

The Caucasus and the EU

- 1. General issues;
- 2. Country issues: Georgia, Armenia, Azerbaijan;
- 3. Relations with the EU: from partnership to association, accession being a distant future?
- 4. The specific case of the Russian North Caucasus.

According to the Bible, Noah landed here



Urartu (Büyük Ağrı) 5165m



Promethean Mythology



Jason and the Golden Fleece



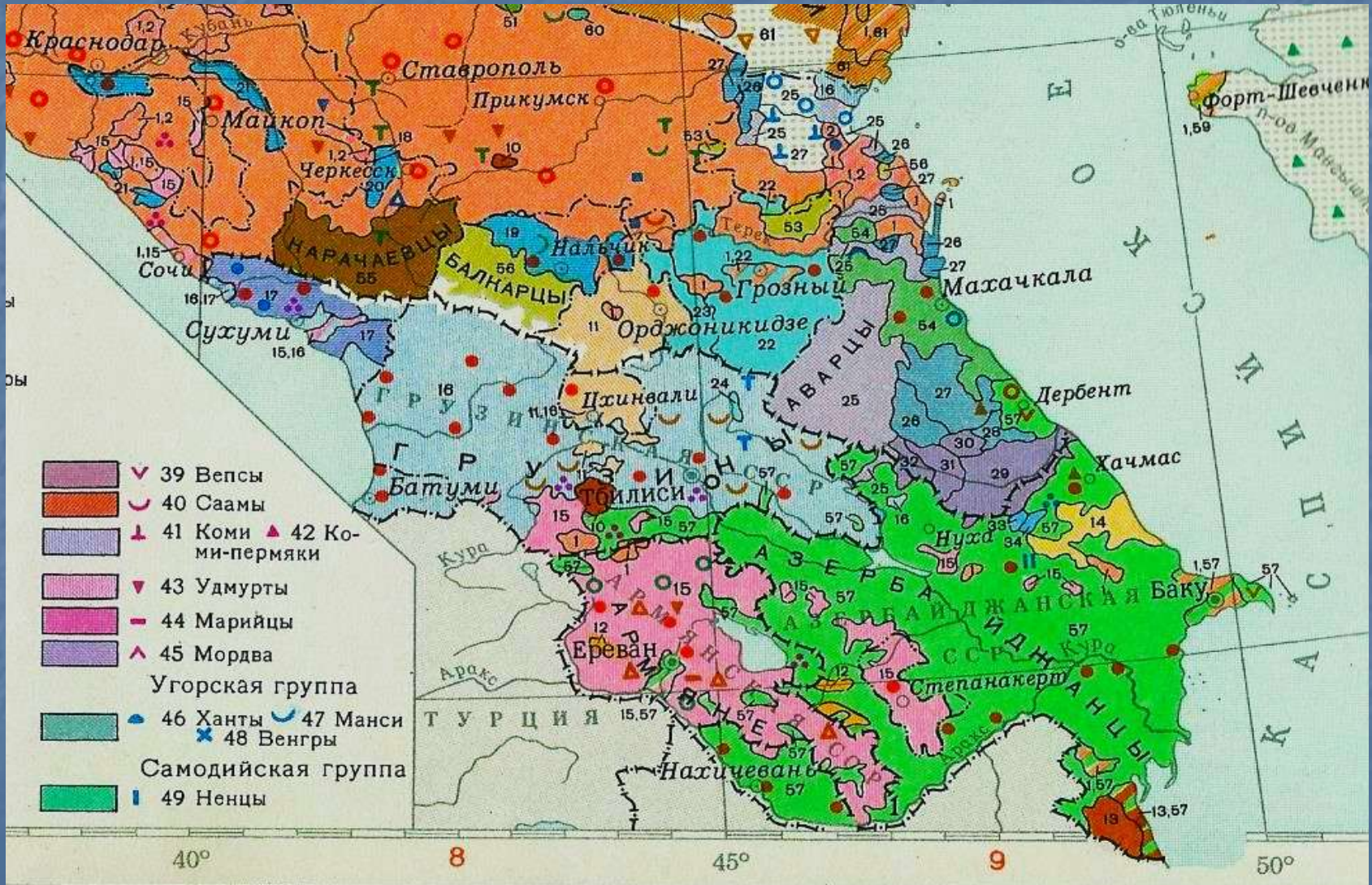
1. General issues

- Diversity of languages and religions;
 - Fragile democracies: inexistant in Azerbaijan, backsliding in Georgia, progressing in Armenia;
 - Poor economic performance;
 - Many border conflicts: between Azerbaijan & Armenia, Georgia & Russia;
- => Increasingly diverging policies.

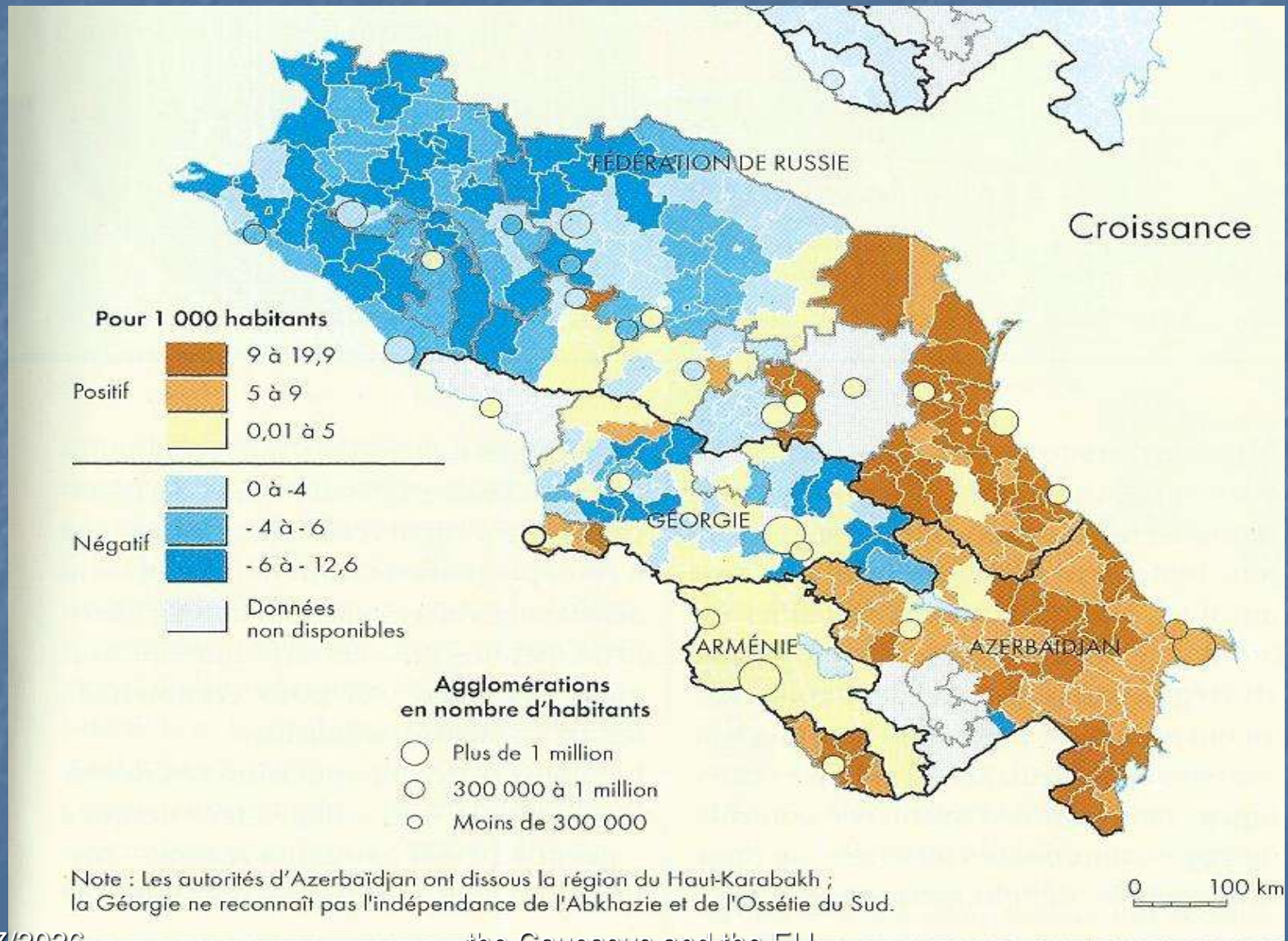
Main features

		Georgia	Armenia	Azerbaijan	South Caucasus
Area	sq km	69700	29743	86600	186043
Population 2025	1000h	5000	2977	10650	18627
	%	26,8	16,0	57,2	100,0
GDP/PPP 2024	millions US\$	91849	60909	225198	377956
	%	24,3	16,1	59,6	100,0
GDP/cap 2024	US\$	25000	20100	22100	20291
	%	123	99	109	100,0

Many languages (Soviet atlas)



Demography



Socio-demographic indicators (2025)	Georgia	Armenia	Azerbaijan
HDI 2025 (max 1)	0,844	0,811	0,789
Literary (%)	99,7	99,9	99,7
Fertility rate	1.94	1.66	1.69
Life expectancy at birth	72,8	76,7	75,9
Infant mortality rate (‰)	20,9	11,3	10,7

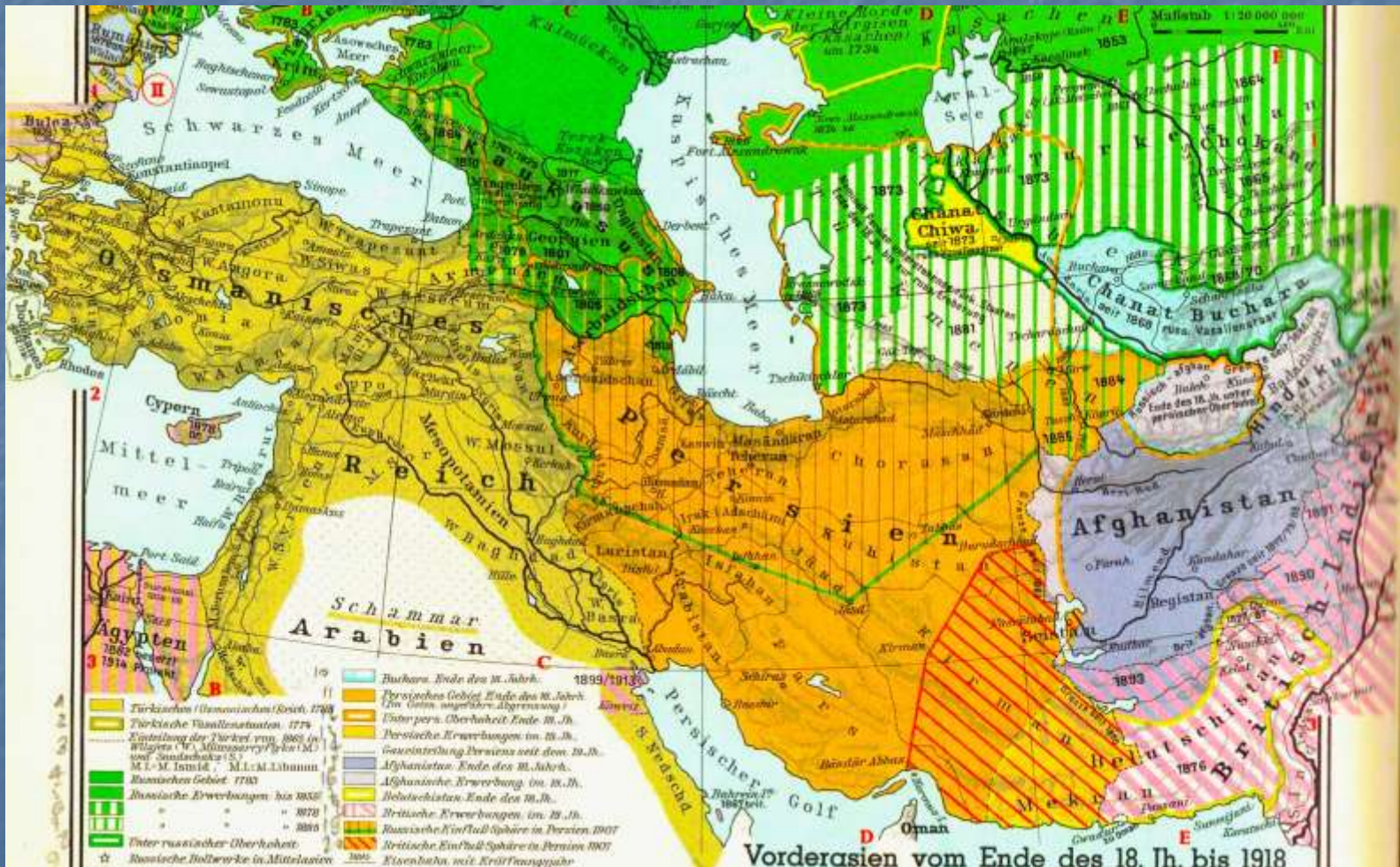
Economy and society

- Poor economic transition ;
- Limited performance (stagnation or low growth except in oil and gas sectors);
- Heavy Soviet heritage (administration, environment, nuclear safety).

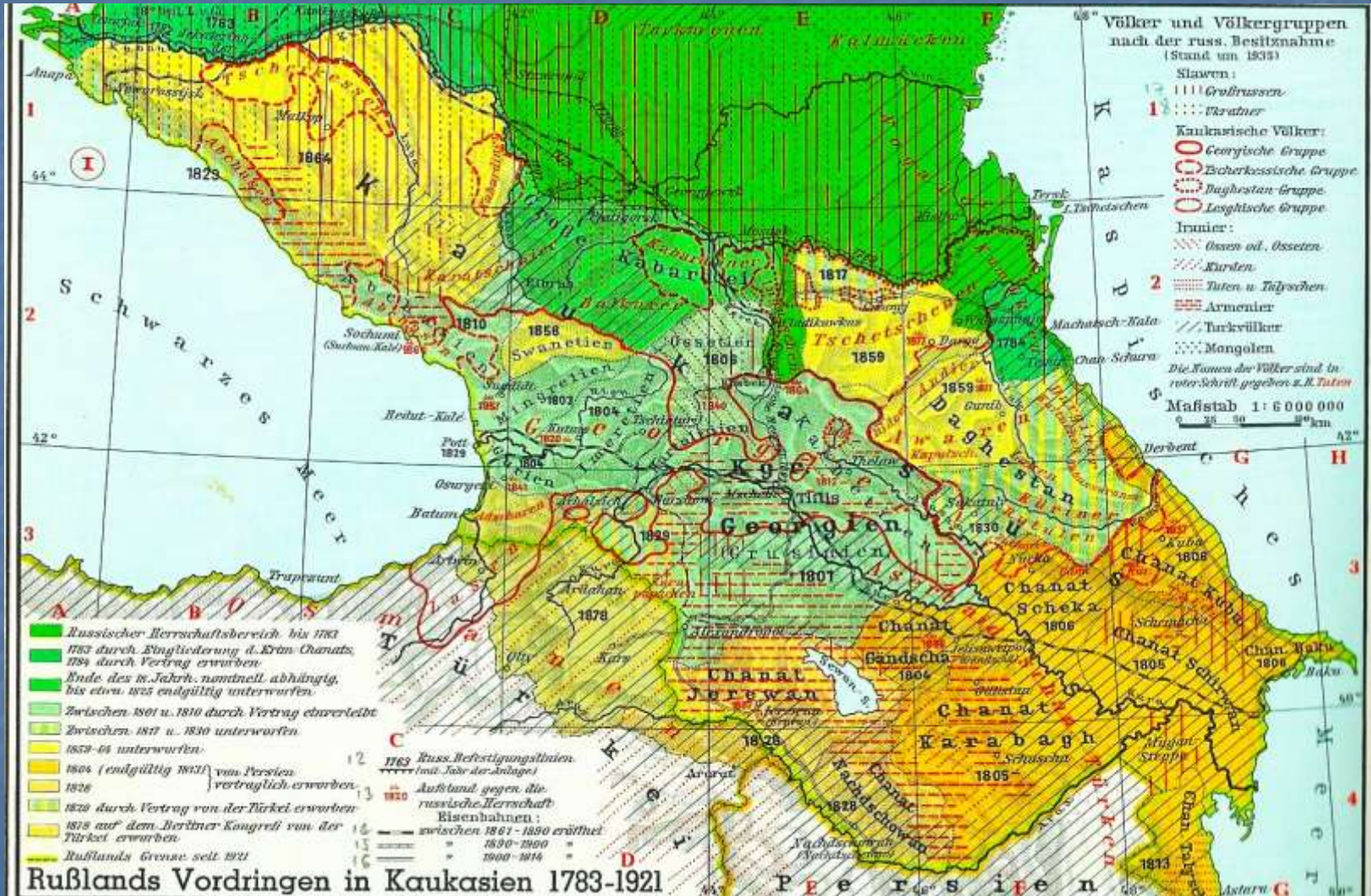
Human rights record (2024-2025)

		Georgia	Armenia	Azerbaijan
Corruption Perception Index: (2024, 180 countries)	score /10	53	47	22
	Rank	53	63	154
Freedom in the world: (2025, 85 countries)				
	Score /10	7,7	7,9	5,5
	Synthesis	Partly free	Partly free	Not free
Reporters without borders: (2025, 180 countries)	Score	50,53	73,96	25,47
	Rank	114	34	167

History: between 3 empires



Caucasus in the 19th Century



Administrative classifications in Soviet Union (1923-1991)

Federated republic (class 1)	Autonomous republic (class 2)	Autonomous oblast (class 3)
SSR	ASSR	AO (oblast)
Georgia	Abkhazia & Adjara	South Ossetia
Armenia	none	none
Azerbaijan	Nakhichevan	Nagorno-Karabakh
RSFSR, then Russia Federation (in North Caucasus)	Kabardino-Balkar, North Ossetia, Chechnya-Ingushetia, Daghestan	Adygey, Karachay-Cherkes

Soviet administration



Since the end of the USSR (1991-2026): many conflicts, never really « frozen »



Heavy military expenditure (2024)

From SIPRI	Georgia	Armenia	Azerbaijan
% of state budget	6,1	18,3	15,2
% of GDP	1,7	5,5	5,1
Total (mUS\$)	615,86	1418,01	3777,09

A long list of conflicts



Août 2008 : Guerre russo-géorgienne et Caucase sous tension



<p>Une importante présence russe</p> <ul style="list-style-type: none"> Fédération de Russie et républiques autonomes Frontière surveillée avec l'aide de Moscou Troupes russes de maintien de la paix avant août 2008 Troupes russes présentes dans le cadre d'un accord bilatéral 	<p>Des républiques aux prises avec les séparatismes</p> <ul style="list-style-type: none"> Géorgie et républiques autonomes République autonome repassée sous le contrôle de Tbilissi République autonome échappant au contrôle de Tbilissi Azerbaïdjan et républiques autonomes République autonome échappant au contrôle de Bakou Arménie et territoires occupés par l'Arménie 	<p>Des enjeux énergétiques</p> <ul style="list-style-type: none"> couloir énergétique existants couloir énergétique en discussion Champ de pétrole 	<p>Août 2008 : nouvelle guerre du Caucase</p> <ul style="list-style-type: none"> ➔ Tentative géorgienne de reprendre le contrôle de l'Ossetie du Sud ➔ Attaque russe pour maintenir le statut-quo voire arracher définitivement l'Ossetie ➔ Attaque abkhaze ☆ Ville ayant subi des bombardements russes
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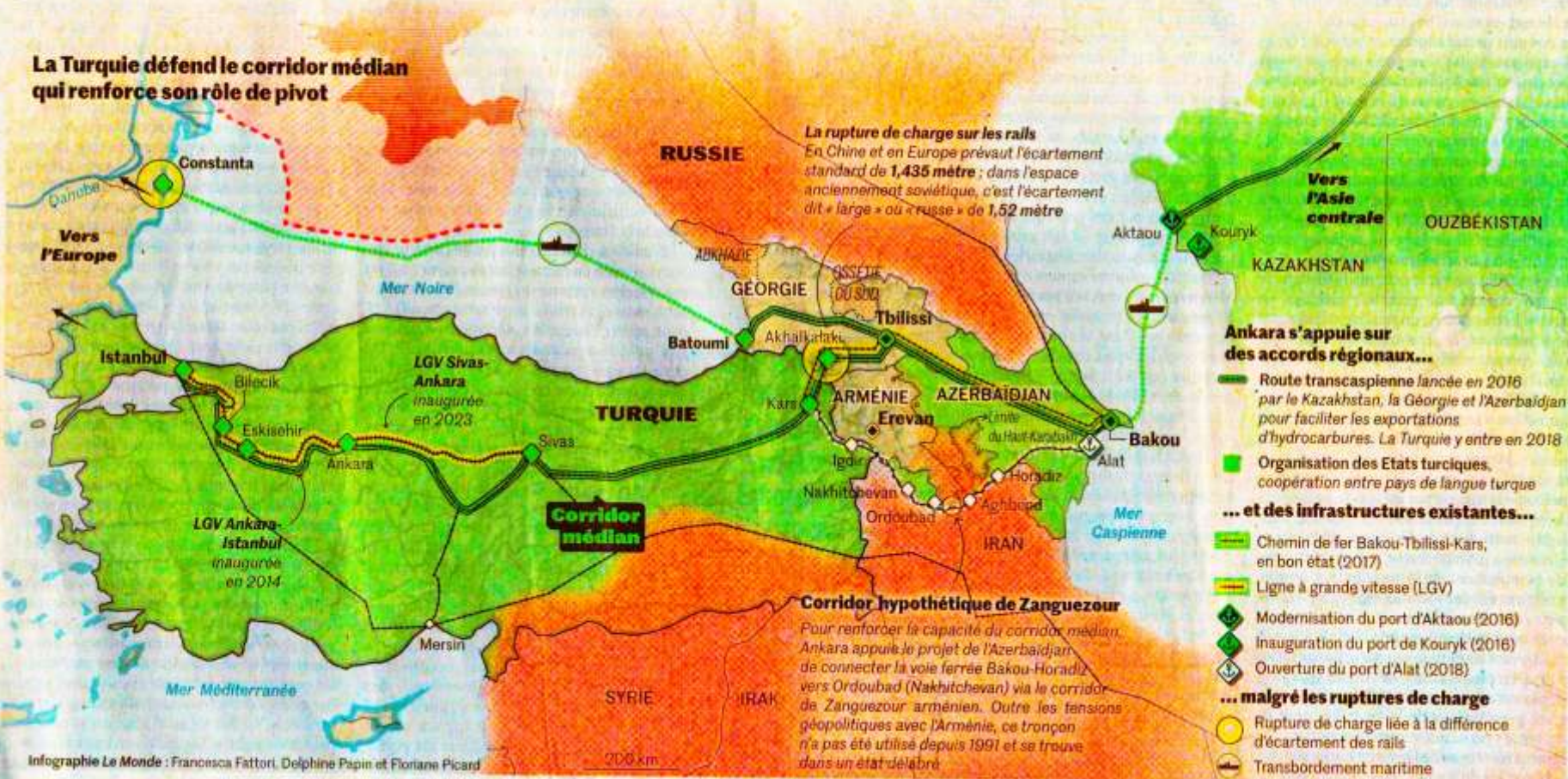
carte par Philippe Perchoc
www.nouvelle-europe.eu
 Août 2008

Losers and winners (2020-2026)

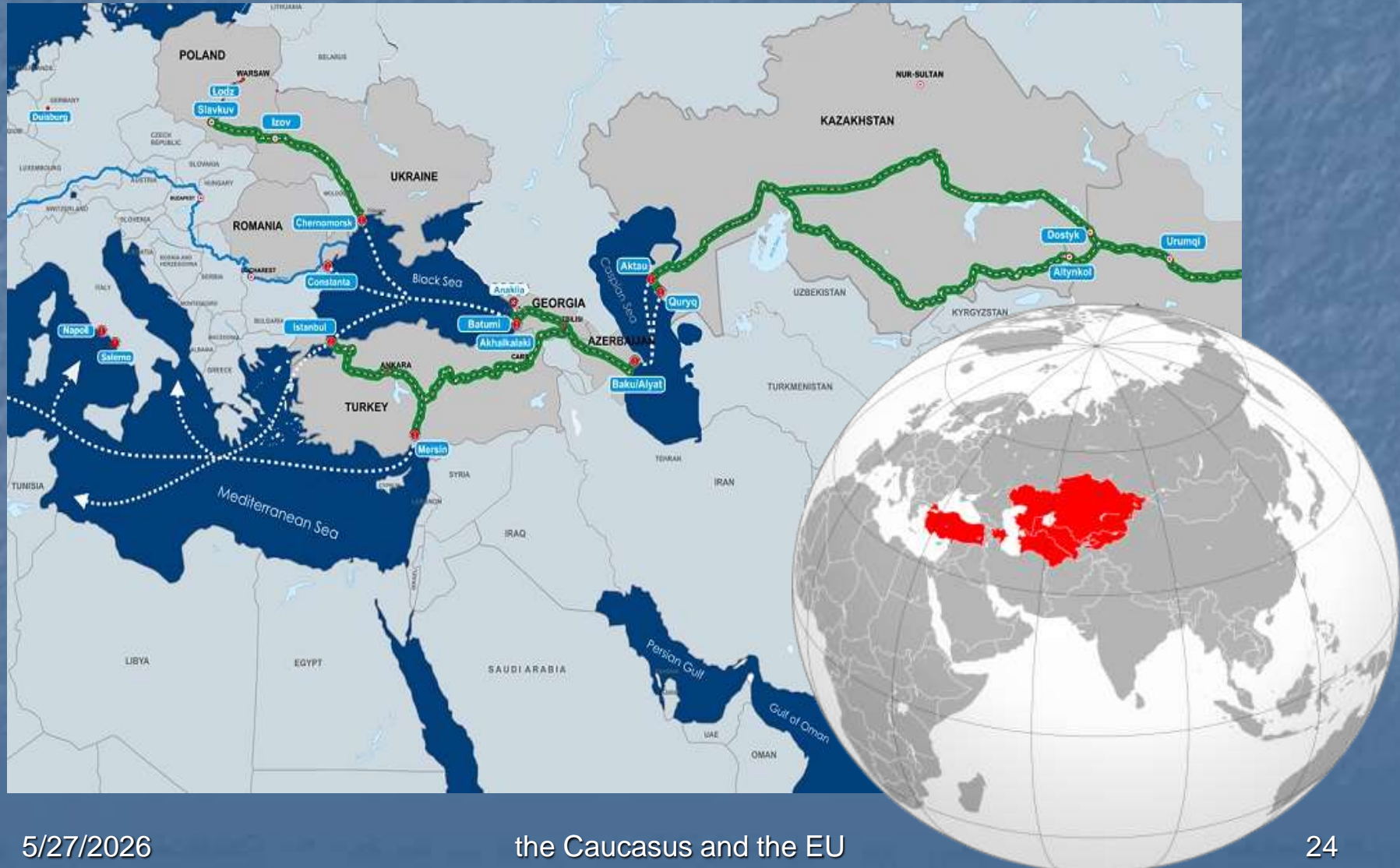
- Armenia lost, Azerbaijan recovered its former province;
- The Minsk OSCE group remaining idle, the US and the EU have lost as well;
- The inactivity of the 2000 Russian soldiers demonstrated Moscow's declining capacity to control the region;
- Is Turkey's strong support to Azerbaijan (diplomacy, drones) to be rewarded?
- What about Iran and Israel, now fearing Turkey's belligerent activity?

De la Chine à l'Europe, une nouvelle route émerge

Avec la guerre en Ukraine, la Turquie en profite pour relancer le projet de corridor transcaucasien



The « middle corridor », unlocking South Caucasus ?



Nakhichevan's strange borders



From the Syunik-Zangezur corridor to the *Trump Route for International Peace and Prosperity*



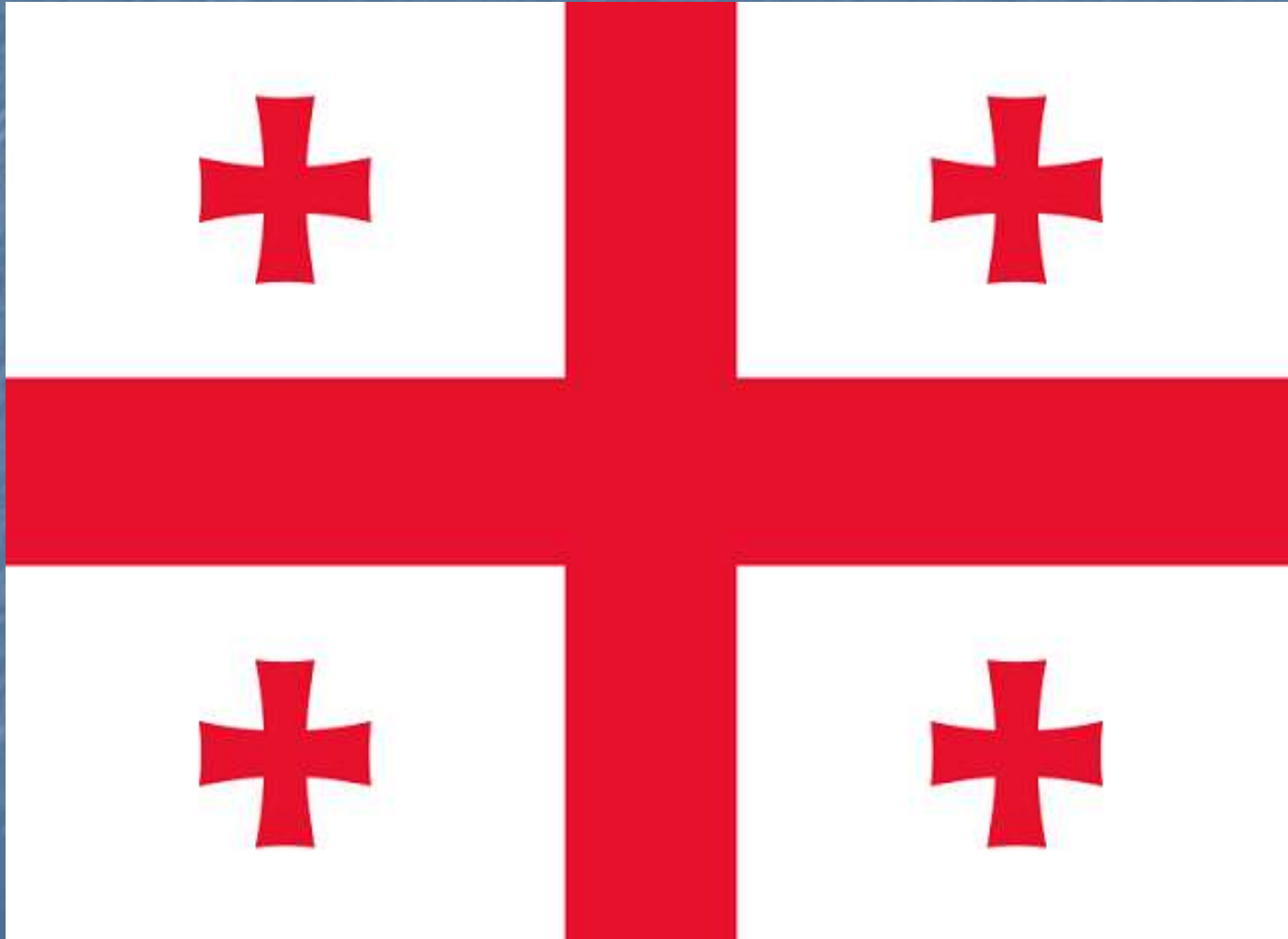
Neither war nor peace: what does Baku really want?

- Machinery of hate remains central in Azeri state ideology to prevent democratisation;
- Baku is ready to reignite the conflict at any moment: military spending is still growing (more than \$5 billion in 2025);
- Deliberate strategy to delay its final signing, to extract more concessions on the Zangezur corridor?

2. Country issues



Georgia





Iossif
Vissarionovitch
Djugachvili
(Stalin)
1878-1953



Lavrenti
Beria
1899-1953

Russian occupation: Abkhazia

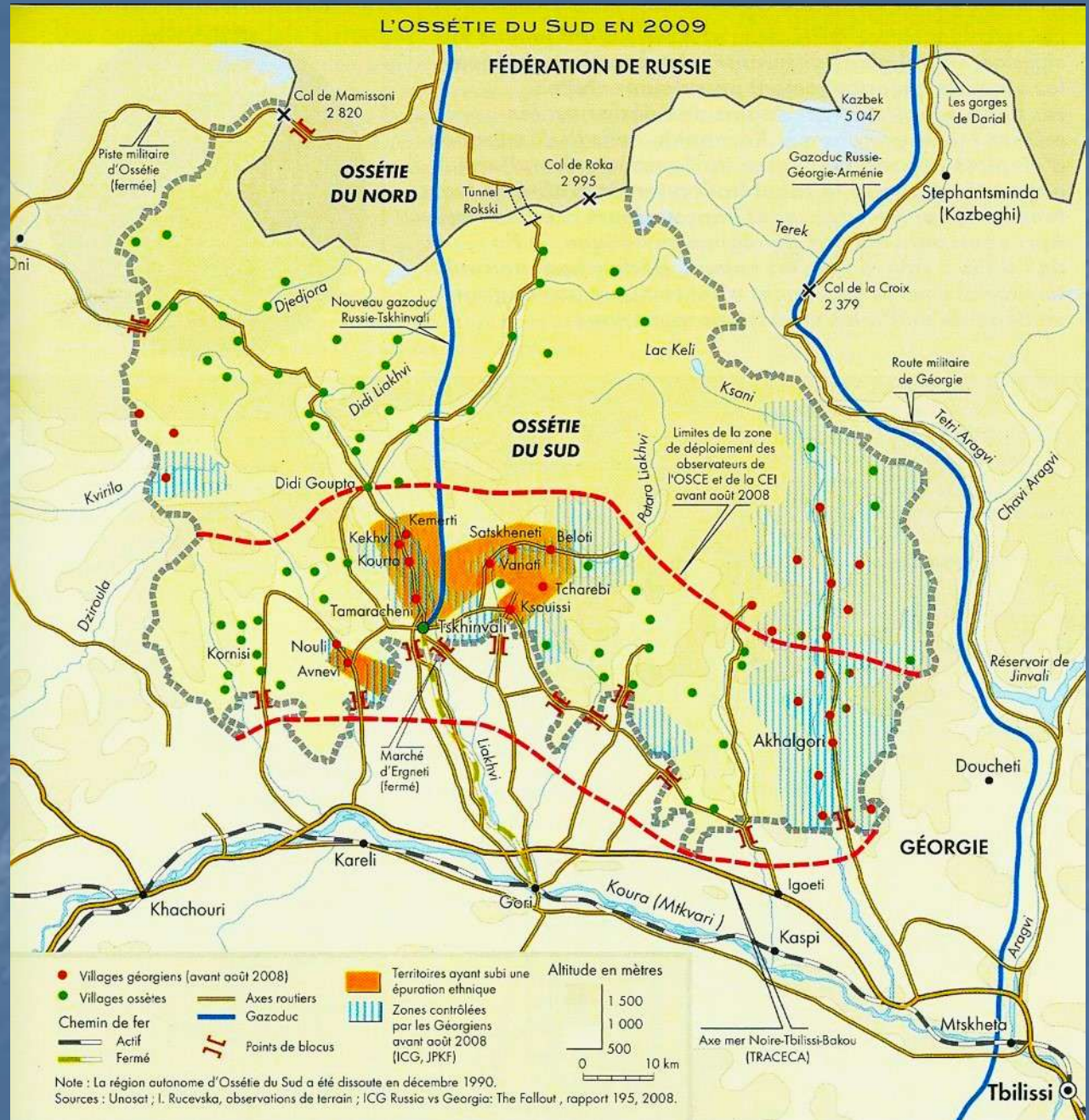




Caucasus
gate keepers,
Ossetes are
living on both
sides of the
Caucasus



Russian occupation in South Ossetia (since 2008)



5/27/2026

**OUR FOREIGN
POLICY PRIORITY
IS THE INTEGRATION
INTO NATO**



Georgia
split
between
Russia
and the
West.

Georgia's backsliding

- March 2022: Georgia applies for membership;
- December 2023: the Council grants candidate status;
- November 2024: Georgia PM suspends accession negotiations until the end of 2028;
- But Georgia is still supposed to join by 2030.

Armenia



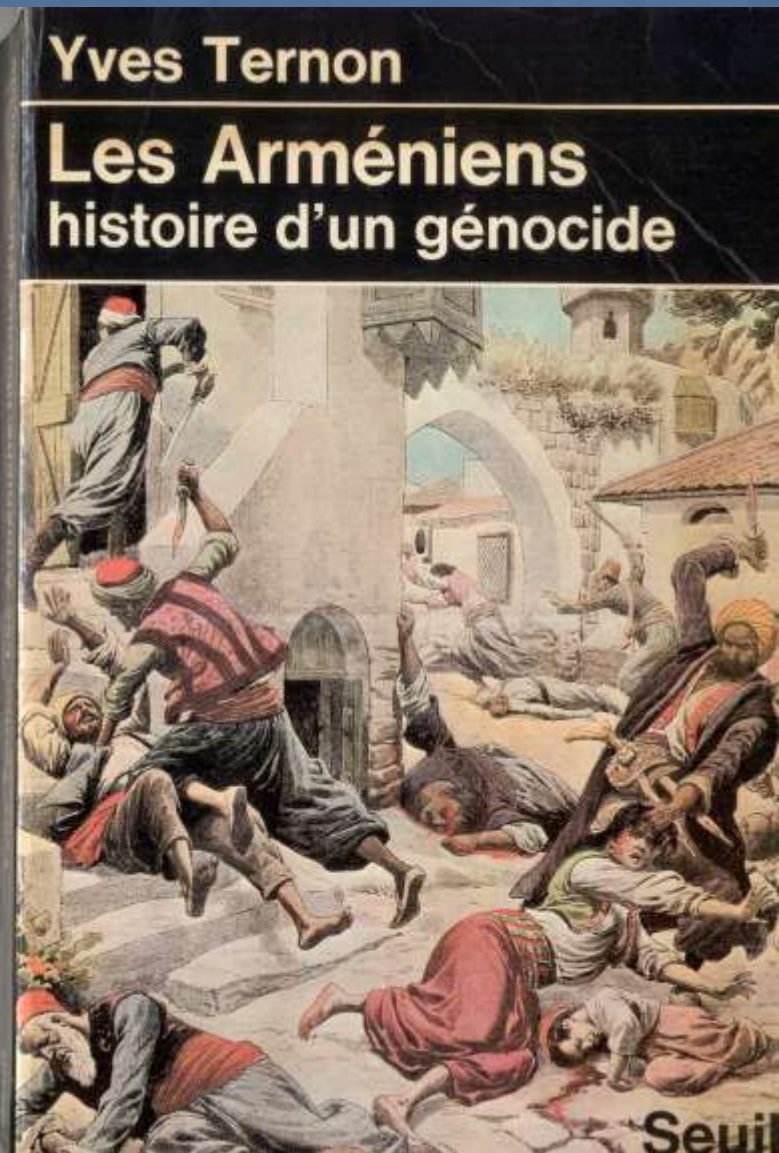
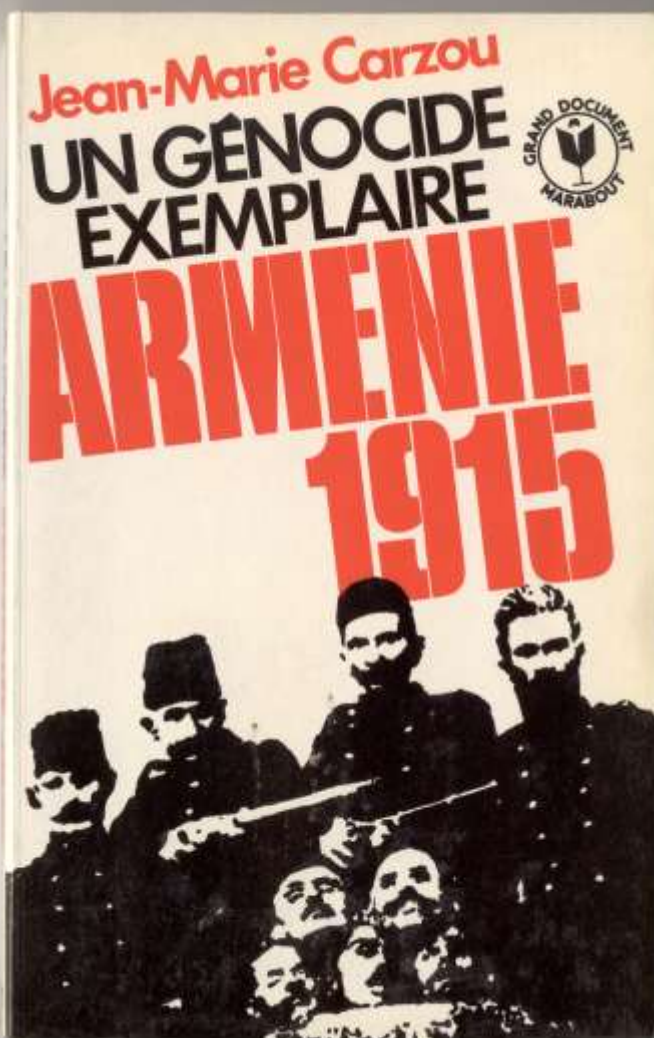
A fateful evolution

- Since independence, due to Nagorno-Karabakh dispute, Armenia accepted to depend on Russia's protection: in 2013 it preferred the Eurasian Union, instead of an Association agreement with the EU;
- Then, the 2018 colour revolution resulted in losing Kremlin's support and Nagorno-Karabakh war;
- Since 2020, Armenia is looking for more Western support.

1915 Genocide figures

- 1914: 2133000 Armenians are living in the Ottoman Empire;
- 1922: 388000 Armenians remain within the limits of the former empire;
- Genocide estimate : 1745000h killed or deported.

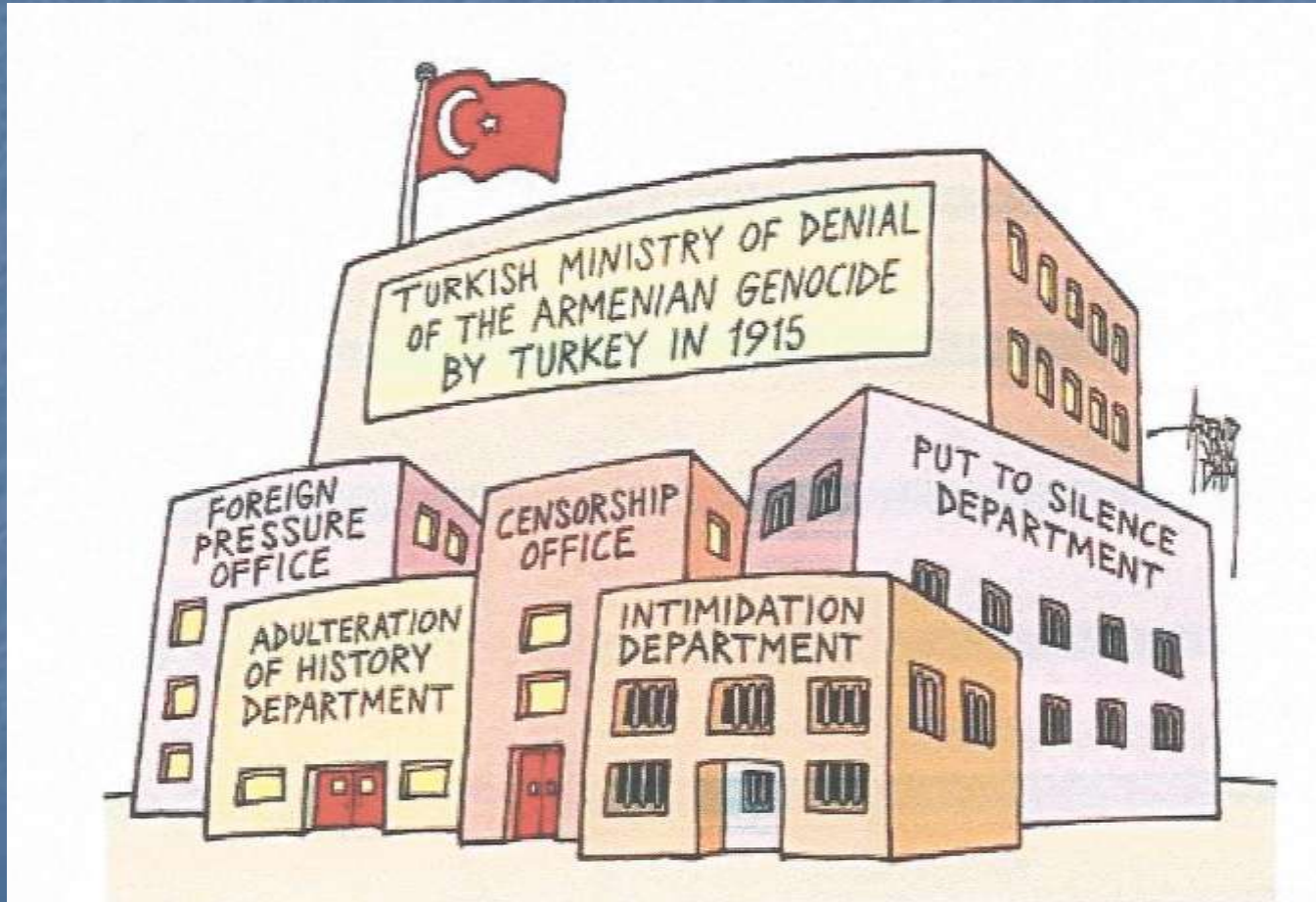
(According to the University of Minnesota's Center for Holocaust and Genocide Studies)



Genocide recognition

- 1919-1920: The [Istanbul trials](#), held by the Ottoman government, acknowledged the massacre of Armenians as "war crimes";
- 1985: the Whitaker report qualifies the systematic 1915 Ottoman massacre of Armenians as meeting the criteria for the UN definition of genocide;
- Since, 33 countries have recognised the Armenian genocide. It is still denied by Turkey, Azerbaijan and Pakistan.

Turkey's doubtful Foreign policy priority



The genocide denial

- As Turkey remains negationist, its diplomacy is pressuring foreign countries to prevent its recognition;
- For Armenia, genocide denial means killing Armenians twice. But only a small minority is asking for territorial and financial compensations.
- Turkish-Armenian border is closed since 1994.

What are the Turks afraid of



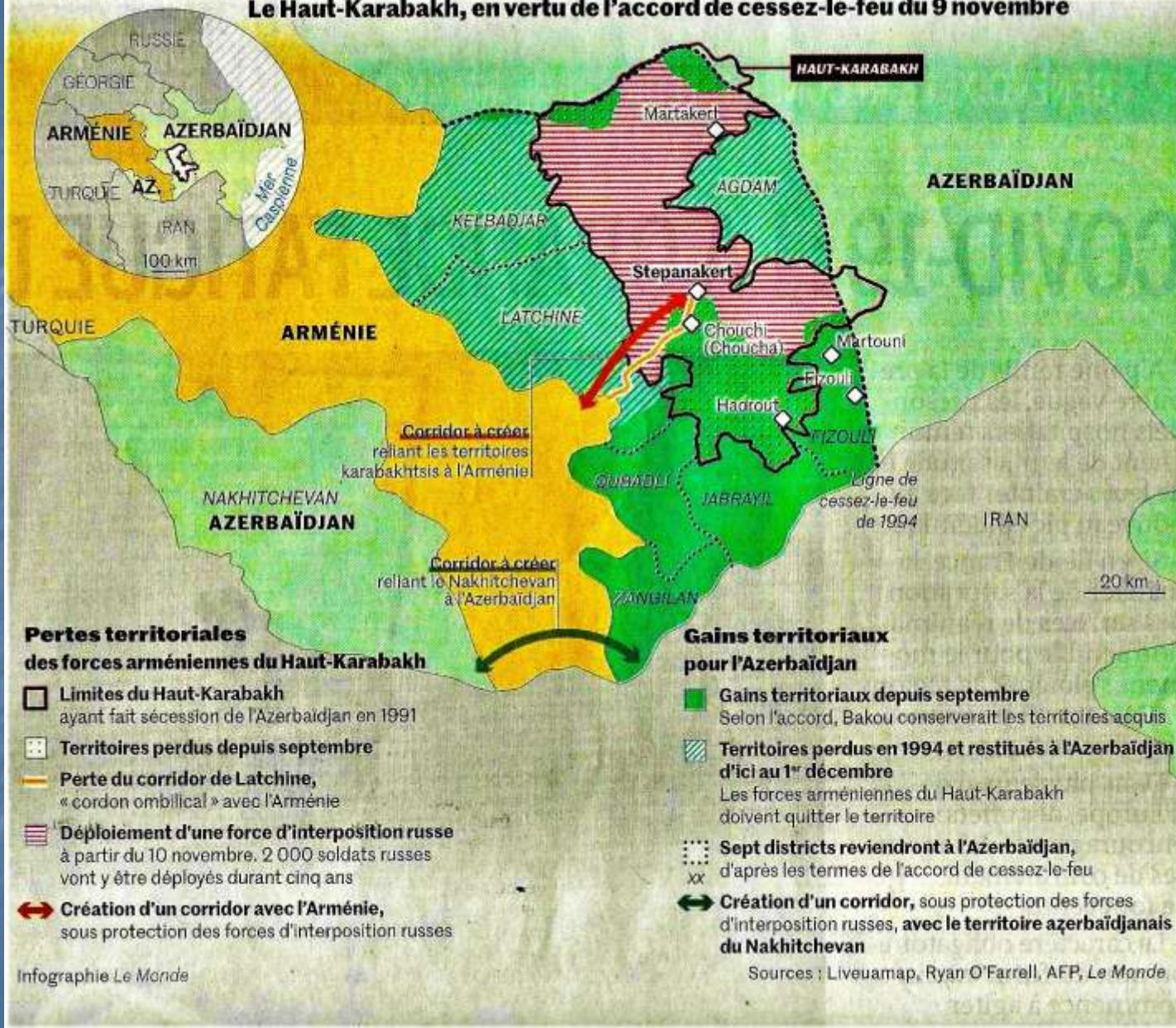
Armenia's losses



Nagorno-Karabakh autonomous region: Stalin delimitation (1923)



Le Haut-Karabakh, en vertu de l'accord de cessez-le-feu du 9 novembre



Nagorno-Karabakh: the end ?



Genocide again?



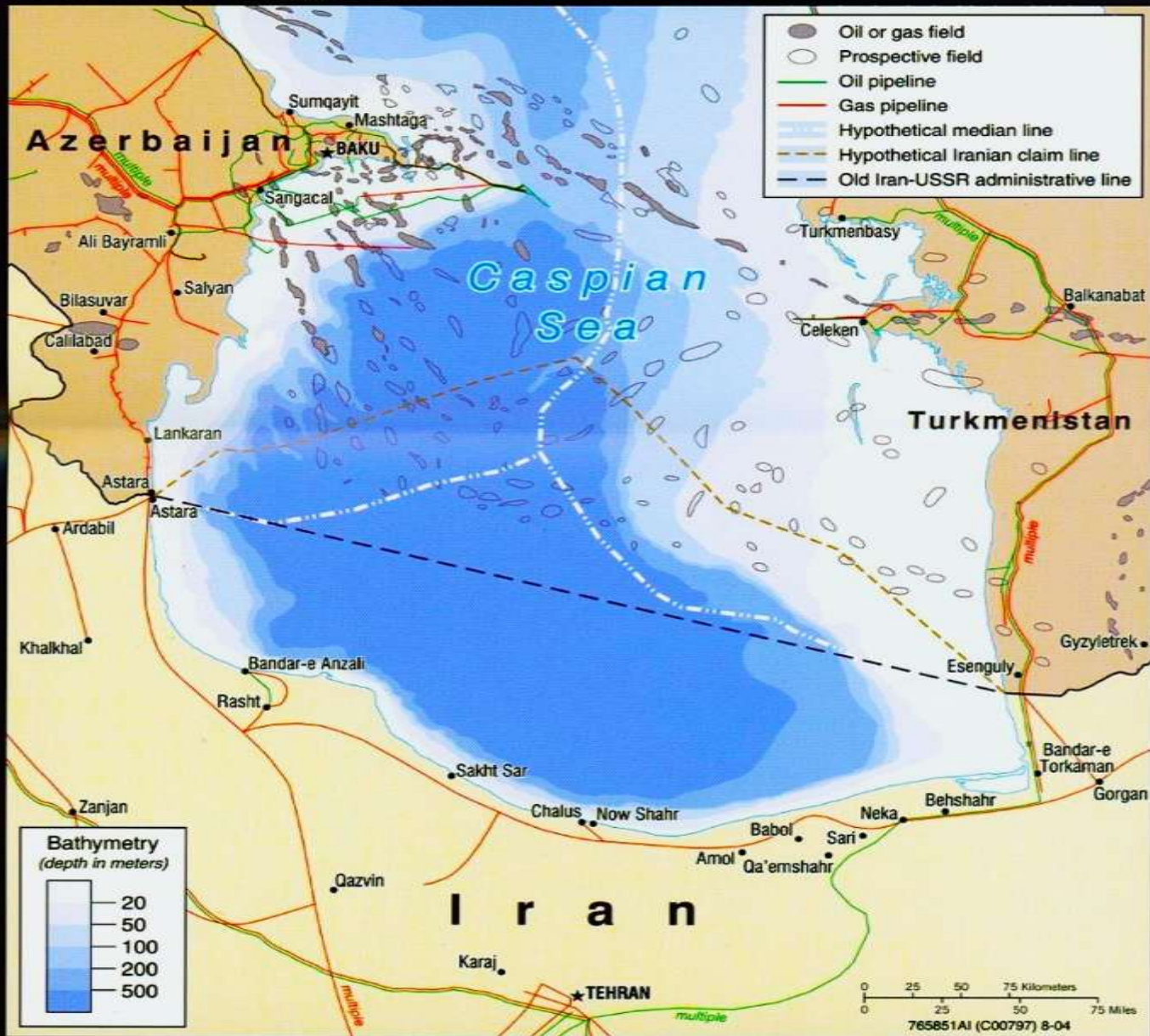
Azerbaijan



Oil & gas production (2024)

- Decreasing for oil: 27,7Mt (max 50Mt en 2010);
- Growing for gas: 50,3 bcm;
- Oil & gas = 90% of exports, 66% of GDP.

Southern Caspian Energy Prospects



Nobel brothers' Baku oil fields



Azeri gas and the EU

- Memo of understanding: delivery of 20 billions cm/year;
- Aliyev: “*Long-lasting, predictable and very reliable cooperation between EU and Azerbaijan in the field of energy is a big asset.*”
- The Southern Gas Corridor transporting Azeri gas to the EU is operational since 2020.

Which future?

According to *The Economist*:

- *“Future is still unreliable, even though the Armenian side has recognized the territorial integrity of Azerbaijan.*
- *The issue of the Zangazur Corridor is the part of the peace agreement between Azerbaijan and Armenia that needs to be clarified”.*

Relations with the EU

- South Caucasus is not a first priority: no common borders, limited trade opportunities, risks of confronting Russia;
- However, there are important political issues: stabilizing EU neighbourhood, energy security (both for production and transit);
- EU's democratic priority (« *more for more* ») contradicts Azerbaijan's role as a main gas & oil supplier.

Association agreements

- 1996: as with other ex-Soviet Republics, 3 APA signed, in force since 1999;
- 2004: not initially included, the 3 countries had been added to the ENP;
- since 2009: participating in the Eastern partnership (3 Caucasians + Ukraine & Moldova), Belarus frozen;
- Limited results.

Trade with EU (2024)

Millions €	Georgia	Armenia	Azerbaijan
Imports	4263	1525	2569
Exports	530	565	15532
Main partners with	(% of total trade)		
EU	22,1	7,5	41,2
Turkey	13,8	1,1	12,9
Russia	10,8	41,1	10,1
Iran		2,4	
US	9,4	1,4	3,7
China	8,2	9,4	7,9

Trade framework

- Georgia: Deep and Comprehensive Free Trade Area (DCFTA), leading to convergence with EU laws and standards. Suspended candidate status;
- Armenia: a member of the Eurasian customs union (with Russia), but applying for an association agreement
- Azerbaijan: not a WTO member (only observer).

EU Georgia

- Deep and Comprehensive Free Trade Area (DCFTA) in the new association agreement in force since July 2016;
- Visa free to Schengen area since 2017;
- Recognised candidate (2023), then suspension until 2028, accession planned for 2030.

EU-Armenia

- 2013: joining the Eurasian Economic Union (excluding an Association agreement with the EU);
- 2021: Comprehensive and Enhanced Partnership in force;
- 2024: Visa liberalisation dialogue;
- 2025: a bill endorsing Armenia's EU accession objective is voted in Parliament.

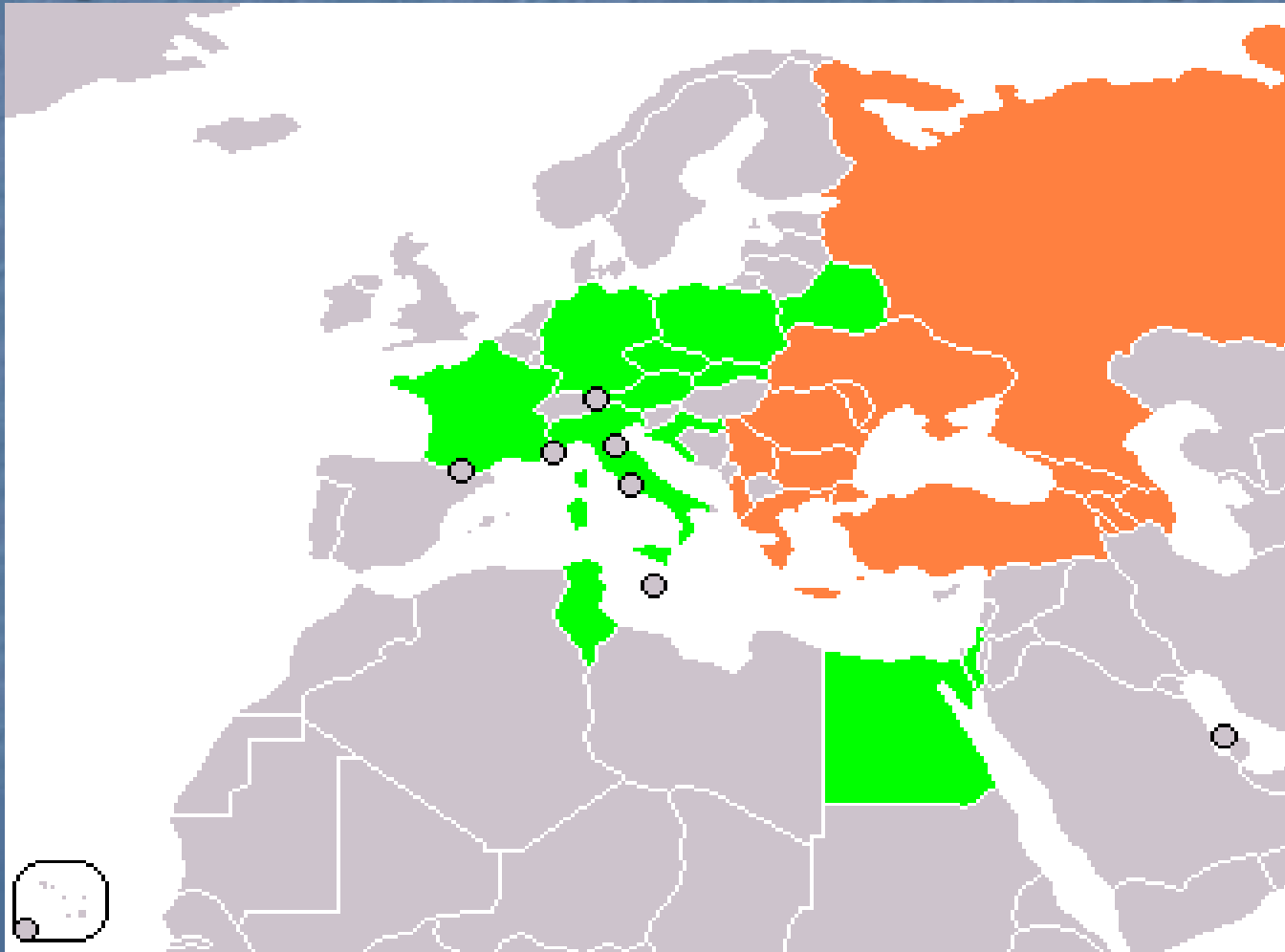
EU Azerbaijan

- Partnership and Cooperation Agreement (PCA) since 1999;
- Limited EU support: visa facilitation and readmission agreement since 2014.

BSEC

- Created in 1992 with 11 member states (7 having direct access to the Black sea + Albania, Greece, Armenia and Azerbaijan)
- Permanent Secretary established in 1994 in Istanbul;
- Black Sea Trade and Development bank established in 1997;
- Charter agreed upon in 1999, giving BSEC the status of a regional economic organisation.

BSEC members and observers (before war in Ukraine)



4. Russian Northern Caucasus

- The Northern Caucasus nationalities of the didn't get RSS status and have remained part of the Russian Federation;
- Chechniya tried twice to win independence and failed, due to heavy Russian reaction;
- Since 2000, the old conflict between the Russians and the Northern Caucasians has taken a religious dimension.

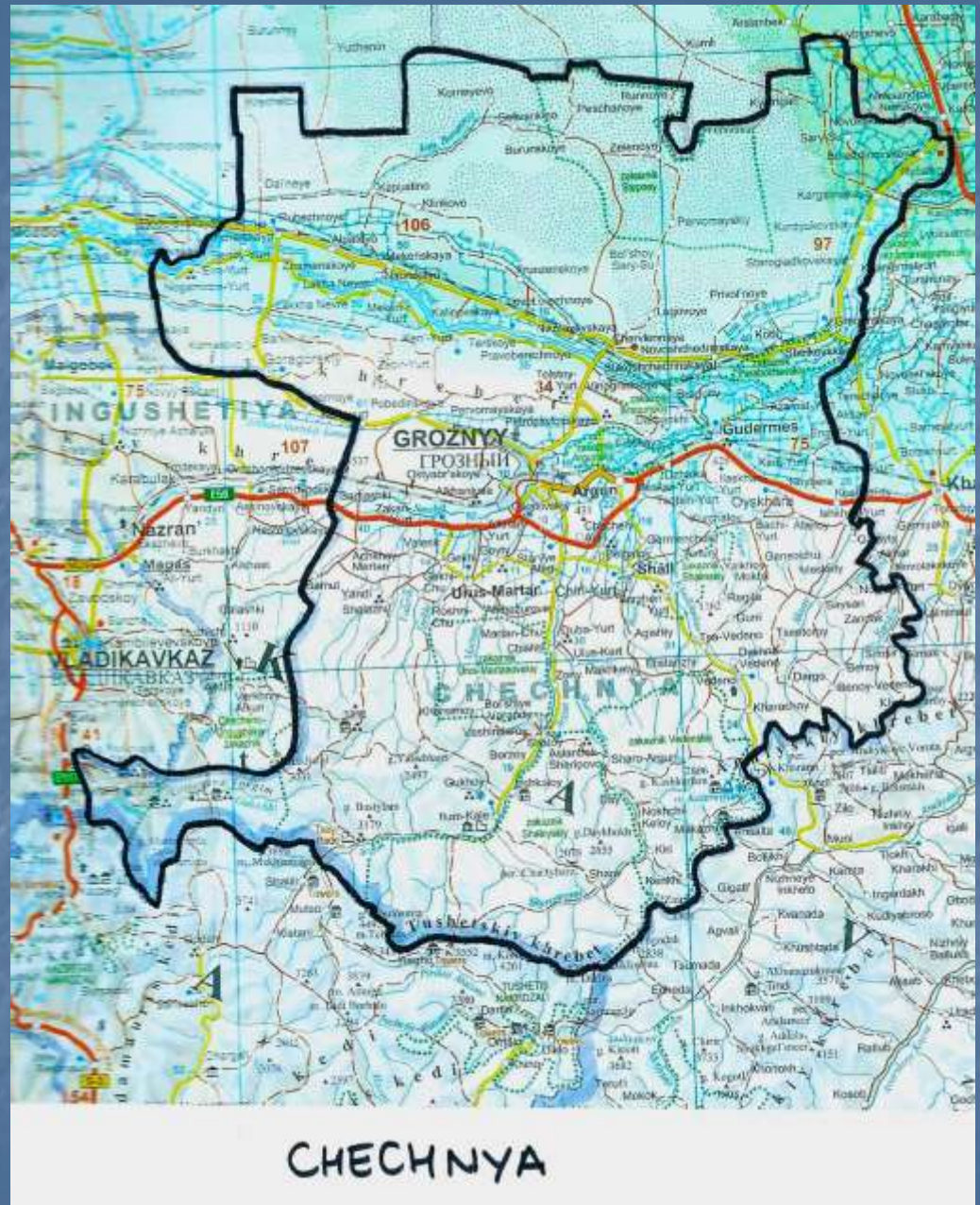
North Caucasus

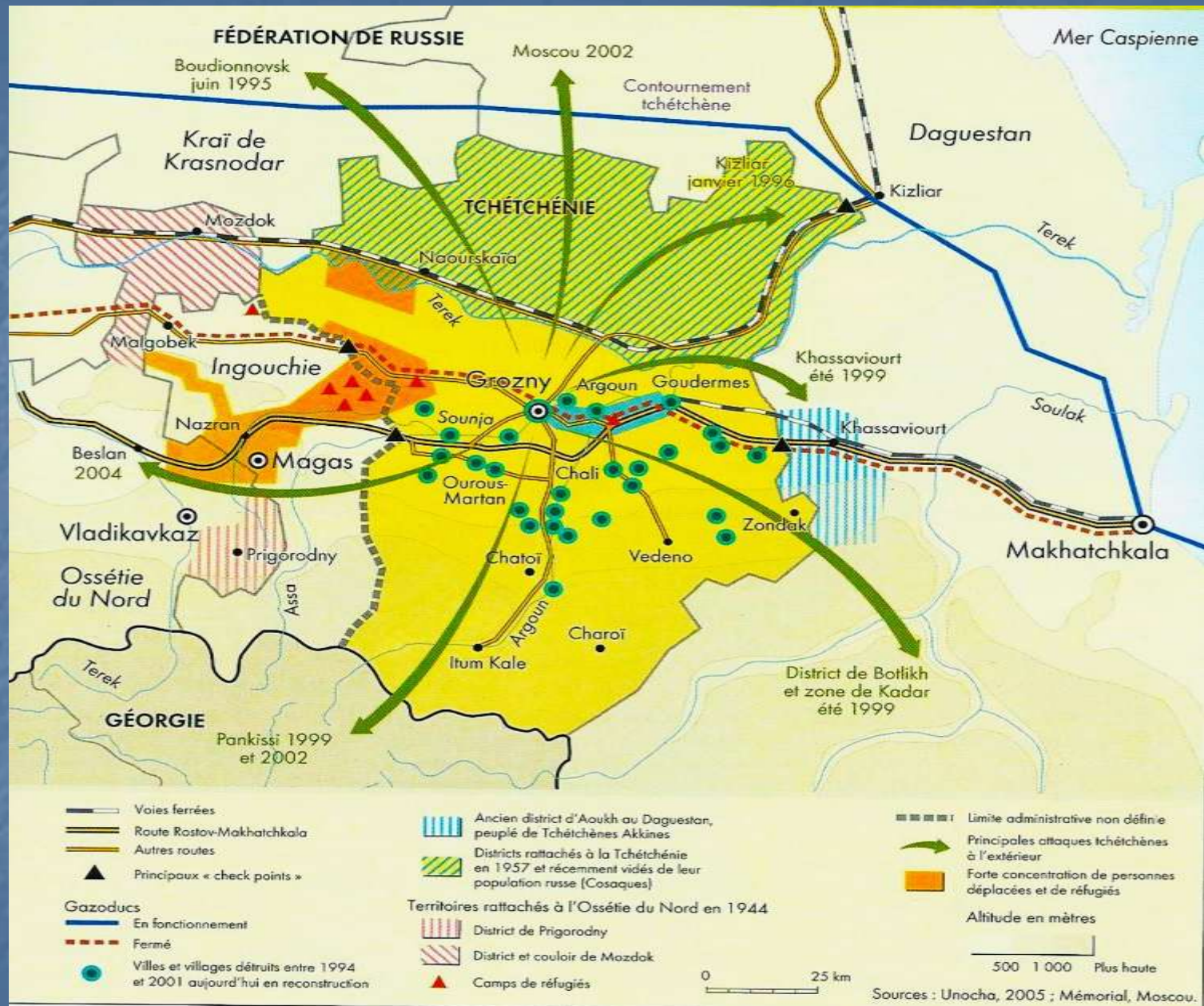
		Population	Titular Nationalities	Russians
Autonomous Republics (ARs)	Area Sq km	2010 1000h	2010 %	2010 %
Adygey	7600	440	26	64
Dagestan	50300	2737	80	9
Ingushetia	3628	517	83	4
Kabardin-Balkar	12500	894	67	25
Karachay-Cherkes	14100	478	53	32
North Ossetia	8000	701	63	23
Chechniya	17300	1268	95	2
North Caucasus ARs	113428	7035	74	16

LE POURCENTAGE DE RUSSES PAR DISTRICT EN 2002



Rebel Chechniya





The islamist dream (258300 sq km, 10 millions inhabitants)



Conclusion : unstable forms of partnership and association

- Lack of political stability;
- No stable borders;
- Russian pressure;
- Limited economic perspectives (except with Azerbaijan).