

A greater US presence in the Caucasus. Vice President Vance in Armenia and Azerbaijan

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On 9–10 February, US Vice President J.D. Vance visited Armenia and Azerbaijan. In Yerevan, he signed an agreement with Prime Minister Nikol Pashinyan on cooperation in the field of nuclear energy, enabling US investment in this sector of Armenia's economy. In Baku, Vance and President Ilham Aliyev signed a charter on a US–Azerbaijani strategic partnership, providing for the establishment of working groups to develop specific joint projects. A similar charter on cooperation with Armenia was signed more than a year ago, in the final days of the Biden administration. For both countries, this marked the first visit by a US politician of such senior rank.

Vance's visit confirmed that Washington seeks to increase its presence in the region, particularly in the transport and energy sectors, and that it intends to continue its efforts to achieve a comprehensive peace between Armenia and Azerbaijan. The visit also signalled support for Armenia as it seeks to gradually reorient its foreign policy from Russia towards the West, as well as for Prime Minister Pashinyan personally, less than four months ahead of the parliamentary elections.

Nuclear power for Yerevan, a transit hub for Baku

The deal with the United States on cooperation in the field of nuclear energy opens prospects for Yerevan to reduce its dependence on Moscow in this sphere, in view of the planned shutdown of the Metsamor nuclear power plant in 2036. The facility dates back to the Soviet period, and its operator and supplier of nuclear fuel is the Russian state corporation Rosatom. A decision on who will build a new reactor is expected soon, although Pashinyan has not ruled out extending Metsamor's operation by 10 years. Vance's declaration that the US could invest \$9 billion in Armenia's nuclear energy sector should be interpreted as a signal of Washington's readiness to take part in the project. The two countries also plan to enhance military cooperation. In the near future, Armenia is expected to purchase US drones worth \$11 million.

The charter on strategic partnership between the governments of the United States and Azerbaijan provides for close cooperation in the development of regional transport routes, with particular emphasis on the Middle Corridor, as well as land, maritime and air infrastructure, energy links, and data transmission connections. It also envisages the introduction of trade and transit facilitation measures and cooperation in other related areas. The document refers to joint efforts to support economic growth, promote investment, and improve the bilateral business climate.

The United States has declared its support for Baku's efforts to strengthen Azerbaijan's position as an energy, trade, IT, financial, transport, and logistics hub in the Caspian region. The charter also envisages close cooperation between the two countries in the fields of security, including cyber security, defence, and counterterrorism. The document provides for the establishment of working groups on economic and trade cooperation, energy, connectivity, artificial intelligence and digital development, as well as security and defence. Within three months, these groups are to present a list of specific projects and plans for their implementation.

A similar strategic partnership charter was signed by the United States with Armenia more than a year ago, while Washington's strategic partnership with Georgia has been effectively suspended.

Peace under US auspices

The most striking manifestation of the US presence in the region is TRIPP (Trump Route for International Peace and Prosperity), mentioned twice in the US–Azerbaijani charter and also referred to by Vance in Yerevan. The project combines commercial and peacebuilding elements, as it would facilitate an Azerbaijani–Armenian agreement, alongside a clear public relations component aimed at promoting the US president. It envisages a roughly 40-kilometre stretch of road and railway and, in the future, additional connections, including a fibre-optic link. This would allow communication between mainland Azerbaijan and its exclave of Nakhchivan, and further on to Turkey, via Armenian territory.

The rules governing the future use of this route, which has been blocked since the early 1990s, have been one of the main points of contention between Baku and Yerevan. Azerbaijan sought what would, in practice, amount to an extraterritorial corridor (known as the Zangezur Corridor). Yerevan insisted that transit must respect Armenia's territorial integrity. TRIPP, which is to be operated by a US–Armenian company established in January, reconciles Baku's expectations with Yerevan's interests. The agreement has been concluded for a period of 99 years.

The TRIPP project was first presented on 8 August 2025 in Washington, on the occasion of the signing of a peace declaration by President Trump, President Aliyev, and Prime Minister Pashinyan (see '[The Washington Declaration: moving closer to peace in the South Caucasus](#)'). The document referred to the need to continue efforts towards concluding a peace agreement, the text of which had been initialled by the foreign ministers of Armenia and Azerbaijan and expressed the intention to unblock regional transport routes.

Baku insists that the preamble to Armenia's constitution, which refers indirectly to Nagorno-Karabakh, be amended, which would require a referendum. Therefore, it does not appear likely that a formal peace treaty will be signed soon. Nevertheless, peace has, in practice, already taken hold. Last year's Washington declaration sealed this reality. For many months, there have been no armed incidents between the two sides. In October, Azerbaijan lifted restrictions on the transit of goods to Armenia, effectively ending the blockade imposed on the country since 1989. With the borders still closed, goods, including Azerbaijani fuel, continue to be transported via Georgia.

A new balance of power in the region

The launch of TRIPP is likely to reinforce the emerging balance of power in the region, in which Azerbaijan, backed by Turkey, is becoming the dominant local actor. While maintaining pragmatic cooperation with Russia and Iran, including north–south transport and energy links, Baku is primarily expanding east–west routes. As a result, it is becoming an increasingly important link in trade between the Far East and Europe. The need to tranship goods onto vessels across the Caspian Sea will, however, remain a constraint on the functioning of the Middle Corridor. Azerbaijan has adopted an assertive approach towards Russia and does not shy away from confrontation (see *'Another stage of the crisis between Baku and Moscow'*).

Once regional routes are unblocked, Armenia is likely to gain greater room for manoeuvre, thereby strengthening its position vis-à-vis Russia. It has already begun to supplement grain imports from Russia, on which it was entirely dependent, with supplies from Kazakhstan via Azerbaijan. However, the reorientation of its foreign policy towards the West must be gradual, given the country's multi-layered dependence on Russia, including the military base in Gyumri, Russian assets in the economy and significant influence within the Armenian Apostolic Church. It also remains unclear whether the railway component of TRIPP can be launched without Moscow's involvement, as Russian Railways owns Armenia's railway network.

The continuation of Armenia's gradual disentanglement from Russia, as well as further normalisation of relations with Azerbaijan and Turkey, depends on Pashinyan remaining in power after the parliamentary elections scheduled for 7 June. In this context, Vance's visit may be regarded as a gesture of support for the incumbent prime minister. Nor can the opening of a border crossing with Turkey ahead of the elections be ruled out, as this would demonstrate the effectiveness of Pashinyan's policy. His main opponents question the need to normalise relations with both Turkic neighbours. At the same time, Georgia, which has been de facto drifting towards Russia and distancing itself from the West, will lose its position as the region's principal transit state. The transport of goods from Azerbaijan to Turkey and from Russia to Armenia will be able to bypass Georgian territory. Oil and natural gas will remain the exception, as they will continue to transit via Georgia. There are no plans to build new pipelines via Armenia.

The strengthening of the US position in the Caucasus, which is also significant in the context of Iran, is likely to accelerate Russia's displacement from the region. Operating TRIPP will require a US presence on the Iranian border, thereby increasing Washington's pressure on Tehran. A discreet military presence under the pretext of protecting the route cannot be ruled out. The need to transport Azerbaijani fuel to Nakhchivan via Iran would also cease to exist. As a result of the second Karabakh war in autumn 2020, Azerbaijan altered the status quo that had been in place since the early 1990s. In September 2023, it unilaterally dismantled the remnants of the separatist Nagorno-Karabakh Republic and subsequently compelled the withdrawal of Russian peacekeeping forces from the region.

Moscow is aware that the processes unfolding in the South Caucasus threaten its established position. It should therefore be expected to intensify political pressure on the region in the coming months, combined with hybrid activities, in order to limit the adverse consequences. In the short term, it is also likely to attempt to influence the outcome of Armenia's parliamentary elections in June, with the aim of removing Pashinyan's party from power.