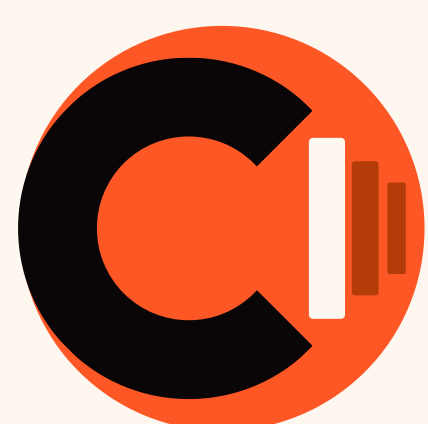


CIVIL INSIGHT

Is Armenia's path to the EU Feasible?

**January 1-15 in Review:
Politics, Narratives, Prospects**



No.3/2026

1. About us

Meeting challenges by expanding our breadth and focus

You are reading the second issue of Civil Insight, a publication by the network of researchers, journalists and practitioners with deep professional knowledge of the South Caucasus, Eastern Europe and Central Asia regions.

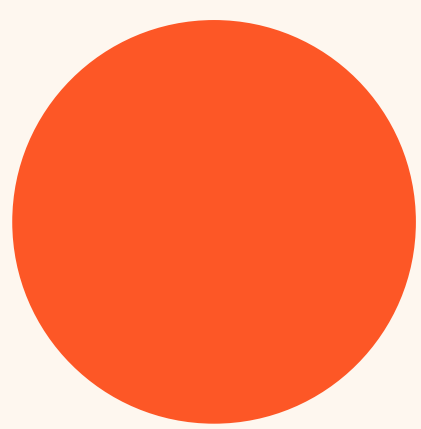
The publication is born from the professional network created by **Civil Georgia (Civil.ge)**, the leading Georgian English-language outlet, its networks and alumni from some 25 years of operation.

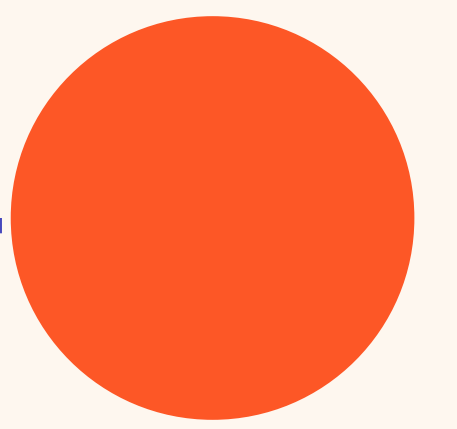
Civil Insight brings you an actionable perspective on the politico-economic context and trends. It is intended for policy-makers and as a reference accompaniment to the field practitioners.

Our mission is to contribute to informed decision-making, and we strive to tap into the best possible expertise available on the ground.

For each issue of the insight, we conduct meetings, interviews, and cross-check our Main Insight with active professionals who review and comment the initial draft.

We are happy to hear your comments.





2. Main Insight

Armenia and the EU: How realistic is Yerevan's EU membership aspiration?

What is happening

On December 2, 2025, Yerevan signed a new Strategic Agenda with the EU to deepen bilateral partnership. In March 2025, the National Assembly of Armenia adopted a bill announcing the start of the EU membership process, drawing on a petition submitted by pro-European political parties and civic groups.

Significance

The dynamics of EU-Armenia ties indicate that European integration has become both a domestic priority and a guiding direction for external policy.

Contrary to arguments that the EU merely offers Armenia a way to diversify its options, recent developments show that Yerevan's chosen trajectory goes far beyond reducing overreliance on Russia: if met with reciprocity, the Pashinyan government appears to be willing to pursue EU membership.

But apart from the geopolitical considerations, Armenia's potential candidacy is hinging on its ability to meet the EU criteria, after decades of pursuing the integration into Russia politico-economic sphere.

Summary

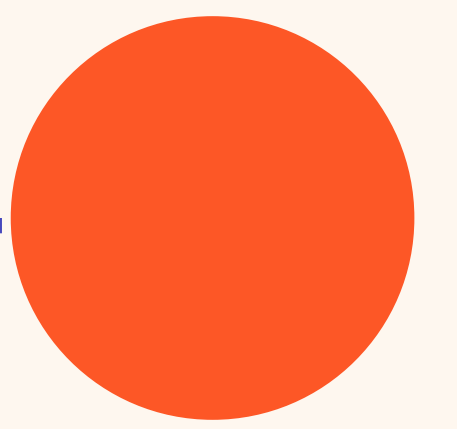
This brief, will assess the country's preparedness for closer EU integration in a more holistic manner.

It first examines public attitudes toward European integration, then evaluate the functioning of state institutions and the economy. Moving on, it will explore the administrative capacity of Armenian institutions to implement EU legislation.

Lastly, the brief will consider the country's alignment with the EU's external policies, as well as other relevant factors such as Yerevan's relations with regional actors.

For each of the thematic sections, an overall assessment is also made, responding to the following question: does this area serve positively or negatively to Yerevan's EU membership aspirations.

European integration has become both a domestic priority and a guiding direction for Armenia's external policy.



Key points

The short-term success of Armenia's "European project" - that is, whether the authorities in Yerevan will remain EU-friendly and whether it will have enough popular mandate to implement painful reforms required for closer European integration - will largely depend on the June 2026 Parliamentary elections, in which President Nikol Pashinyan's Civil Contract party will compete against a constellation of broadly pro-Russian groups.

- Despite Armenia's demonstrative pivot to Brussels, the country's accession to the EU is unrealistic in the foreseeable future. Nevertheless, if Pashinyan's government secures decisive victory in the June 2026 elections, the sides are expected to significantly deepen cooperation.
- Visa-free regime will likely be granted to Armenia, which will increase physical and people-to-people connections, subsequently raising popular support for and economic exchange with the EU.
- The EU will continue supporting Armenia in governance reforms, as well as in economic growth and recovery efforts, with Yerevan showing reciprocal enthusiasm and readiness.
- With EU integration becoming more tangible, socio-political divisions revolving around culture and identity will come to the fore.
- The more in-depth cooperation, including whether Yerevan will file a membership bid and whether it will align fully with EU's common foreign and security policy will depend on broader geopolitical context, especially the end of the Armenia-Azerbaijan conflict and the dynamics of the Russo-Ukrainian war.

Short term success of Armenia's European project hinges on the ability of Nikol Pashinyan's party to secure a clear and clean victory in June 2026 Parliamentary elections.

Background

Armenia's bilateral relations with the EU began shortly after the country regained independence.

Its timeline of partnership with the EU was not unlike that of its neighbor, Georgia – at least on paper. In 1996, Armenia signed the Partnership and Cooperation Agreement (PCA), a framework agreement that remained in force until 2021.

Since 2004, Armenia has also been part of the EU's European Neighborhood Policy (ENP), and since 2009, of the Eastern Partnership initiative (EaP). Relations slowed after the failed attempt to sign the Association Agreement in 2013, relations between Yerevan and Brussels slowed, but from 2015 the sides began negotiating another (but a less in-depth) bilateral agreement. The Comprehensive and Enhanced Partnership Agreement (CEPA) was signed in Brussels in November 2017 and entered into force in March 2021.

CEPA covers the issues of democracy, human rights, good governance, rule of law, mobility, people-to-people contacts, also entailing closer economic and sectoral integration with the EU.

From 2021 to 2024, the EU was actively involved in the Armenia-Azerbaijan peace process, with Brussels officials playing a mediating role between the two sides. In addition, in February 2023 – at Yerevan's request – the EU deployed a civilian mission to monitor incidents near Armenia's border with Azerbaijan. In July 2024, Armenia was also granted its first security assistance through the European Peace Facility.

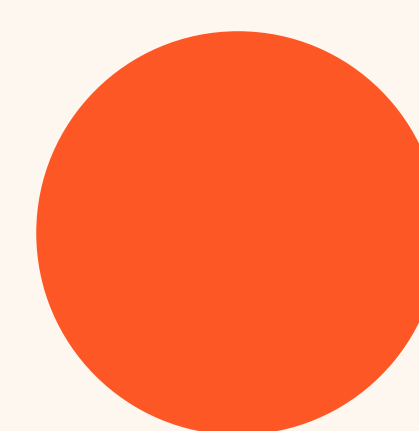
In mid-2024, Brussels and Yerevan began talks on visa liberalization, which – if successful – would allow Armenian nationals to travel to Schengen-zone countries visa-free.

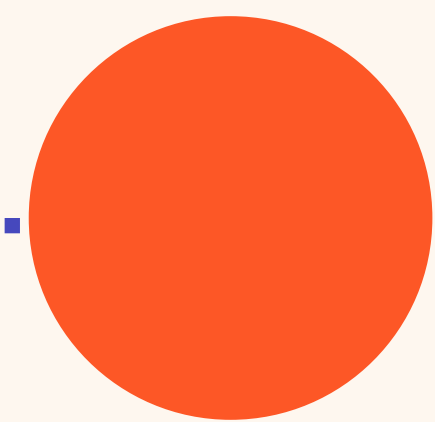
In parallel, several Armenian officials indicated that they could potentially apply for EU membership in the future. In March 2025, the National Assembly of Armenia adopted a bill announcing the start of the EU membership

process, drawing on a petition submitted by pro-European political parties and civic groups. In response, Russia warned that EU membership would not be compatible with membership in the Eurasian Economic Union.

On December 2, 2025, Yerevan signed a new Strategic Agenda with the EU to deepen bilateral partnership. At the time of writing this brief, Armenian officials had not yet shown any signals of a forthcoming membership bid.

Armenia's timeline of partnership with the EU was not unlike that of its neighbor, Georgia until 2013. But Russia has successfully curtailed Yerevan's signing of the Association Agreement. Relations got reinvigorated in 2024.





Analysis

The dynamics of EU-Armenia ties indicate that European integration has become both a domestic priority and a guiding direction for external policy.

Contrary to arguments that the EU merely offers Armenia a way to diversify its options, recent developments show that Yerevan's chosen trajectory goes far beyond reducing overreliance on Russia: if met with reciprocity, the Pashinyan government appears to be willing to pursue EU membership.

A host of challenges remain, including Russia's significant military and economic presence in Armenia, Georgia's gradual shift toward a Russia-aligned policy, and persistent governance issues – these should not automatically hinder Yerevan's aspirations.

Armenia's pivot should be assessed on its own merits, in strict accordance with established criteria. This is not to suggest that geopolitical factors should be dismissed entirely; a favorable geopolitical environment for enlargement is certainly an important consideration.

However, geopolitics is only one aspect. To determine whether a country is ready for closer alignment, one needs to assess the issue across multiple dimensions.

Popular attitudes about European integration

Results of sociological research provide insights into the human side of Armenia's European orientation. Two major takeaways follow from these findings. First, Armenia's support for EU membership lags behind its regional peers, but at a basic level, Armenian society remains broadly receptive to closer integration with the EU. Second, fears that EU membership could affect cultural values remain pronounced.

The CRRC's Caucasus Barometer, region's leading survey, specifically tackles two indicators – Trust in the EU and Support for EU membership. The survey findings show that public support for membership has dropped from 62% in 2011 to 44% in 2024, a figure

significantly lower than in neighboring candidate countries – Georgia at 71% in 2024 (69% in 2011) and Moldova at 63% in 2023 (62% in 2010).

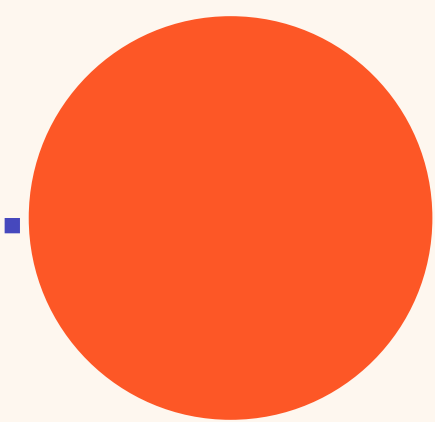
Support for EU membership in Armenia remains lower than in both reference countries, according to another survey, the European Union's annual Neighborhood East poll. In 2025, Georgia showed the strongest support at 74%, followed by Moldova at 59%, while Armenia trailed behind with 45%.

A similar trend emerges with CRRC's Trust in the EU indicator. Confidence in the EU in Armenia fell from 37% in 2011 to 30% in 2024, again trailing Georgia's corresponding levels – 58% in 2024 (45% in 2011).

According to the CRRC survey, in 2021, the main reason Armenians supported joining the EU was the prospect of an improved economic situation (25%), followed by protection from foreign threats (19%) and better relations with the West (16%). In Georgia, the same reasons topped the list; however, support for joining the EU to improve the economic situation was notably higher at 49%, nearly double the share in Armenia. Protection from foreign threats (13%) and improved relations with the West (11%) followed.

Interestingly, among those who did not support Armenia's EU membership in 2024, 10% cited concerns that it would undermine Armenia's cultural identity, while 8% feared it would damage relations with Russia. A similar picture emerges in the EU's Neighborhood East poll. In 2025, the top perceived concerns about EU membership in Armenia were youth brain drain and emigration (21%), potential harm to cooperation with Russia (21%), and the loss of cultural identity and traditional values (19%).





Analysis (...)

Armenia has had a long history of people-to-people relations with European countries. There are strong Armenian diaspora groups in France, Germany, and other European countries.

Additionally, from 2014 to 2020, over 14,750 students and academic staff exchanges have taken place between Armenia and the EU under Erasmus+. Armenia is also associated with the Horizon Europe program, EU4Culture, and other EU-funded initiatives. The tourism statistics, however, show that the share of European tourists is small.

If Yerevan decides to move closer to the EU and this move is reciprocated with tangible economic benefits from the EU, over time, public support will grow – though such gains may be partially offset by increased concerns over identity and relations with Russia.

Russia may have lost its soft power appeal in Armenia, but it still maintains strong influences over media, with a potential to exploit the government's vulnerabilities and undermine trust in the EU integration. Hence, it is crucial that both sides meet the challenge from the onset, and make necessary contingencies. For strengthening its bid, Armenia could also leverage strong diaspora presence in EU countries.

Can Armenia Meet the EU Criteria?

Social and Political Cleavages

Although organized opposition is weak, Armenia's political scene remains vibrant. The environment is generally conducive for opposition activity, but in recent years, there have been numerous reports of alleged political pressure. Nonetheless, political parties and civic groups take active part in public life.

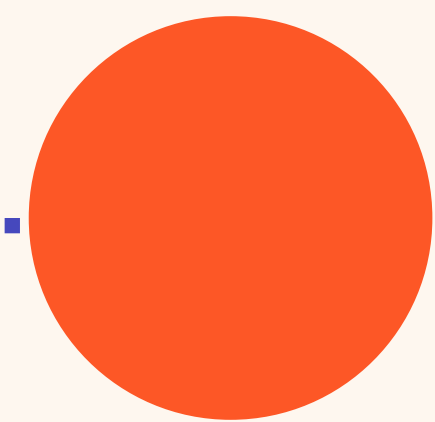
The major political cleavages revolve around security issues: protecting sovereignty and territorial integrity in the face of external threats, and managing deteriorated relations with the former ally, Russia. On the first issue, opponents – primarily from the previous government – accuse the incumbent

administration of mishandling the war with Azerbaijan, as well as of being overly submissive to Baku's demands.

From the government's perspective, Yerevan pursues a measured policy to avoid further Azerbaijani incursions and to lay ground for long-term peace. On the second issue, opponents criticize Pashinyan for failing to secure sufficient support from Russia, while the ruling party favors distancing from Moscow on the grounds that it failed to provide protection. These debates are also taking place alongside government efforts to reshape public discourse around sensitive national issues, such as the Armenian genocide and Nagorno-Karabakh, with the declared aim being to move to a more forward-looking national vision.

If Armenia moves closer to the EU and Brussels reciprocates, public support will likely grow over time.





Analysis - Can Armenia meet EU criteria?

Beyond questions of physical security, a major topic of public discussion is governance reform, particularly in the fields of rule of law, anti-corruption, and judiciary, where Pashinyan's government faces criticism from both pro-democracy and illiberal actors.

Tensions between church leaders and the government have also come under public scrutiny in recent years, with the authorities accusing the church of breaking their vows and interfering in secular affairs, while the clerics criticize the ruling party around the issues of national identity and religion, as well as their handling of the Nagorno-Karabakh conflict.

The European integration is not a subject of heated political debate nor a source of serious social or political divisions. However, if Armenia were to pursue a more tangible approximation with the EU, potential fault lines will emerge, particularly along pro-Russia versus pro-West orientations and among socially conservative segments of society. These tensions might surge in the period leading to the June Parliamentary elections, if the campaign were to acquire a dominant geopolitical dimension.

Level of democracy (checks and balances, rule of law, civil liberties)

Throughout most of its post-independence period, Armenia functioned as a super-presidential republic in which the head of state directed the executive branch, shaping both domestic and foreign policy. With the constitutional amendments that entered into force in 2018, the country transitioned to a parliamentary republic, reducing the presidency to a largely ceremonial institution.

The coming to power of PM Pashinyan raised hopes that the country would make a leap forward in terms of democratization, but progress stalled with the war in Azerbaijan and subsequent skirmishes, as well as other, domestic factors.

Political parties are free to operate, but there are increasing reports of pressure on opposition groups. Elections are competitive and frequently assessed as relatively free and fair, yet reports of irregularities remain widespread, including concerns over the abuse of administrative resources, illegal campaign financing, vote-buying, and violations of ballot secrecy.

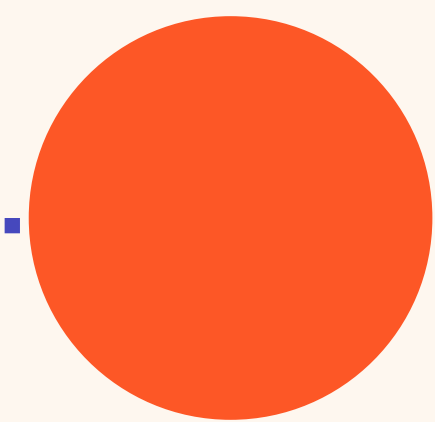
Despite the transition to a parliamentary model, power is disproportionately concentrated in the hands of the prime minister.

The government's anti-corruption efforts have yielded some success, but informal practices and patronage structures remain widespread. Influence of vested interests on politics are also common.

Problems persist within the judiciary, including in terms of political interference in the work of judges. The country has seen positive developments in recent years in terms of safeguarding human rights, but there still are reports of inhumane treatment, arbitrary arrests, and child labor.

Numerous civil society organizations operate in Armenia, many of which engage with the authorities on policy matters. Nonetheless, they tend to be concentrated in Yerevan and are heavily reliant on foreign donors. Sexual minorities continue to experience social stigma and mistreatment.

The EU integration is not a subject of heated political debate yet, but if the accession process starts, fault lines will emerge.



Analysis - Can Armenia meet EU criteria? (...)

Armenia's challenges are well illustrated by international democracy rankings. According to Freedom House's Freedom in the World report, Armenia is rated Partly Free in 2025, with a score of 54 out of 100. Among EU candidate countries, this places Armenia above only Turkey (33), Ukraine (51), and Bosnia and Herzegovina (52). The country is broadly in line with Georgia (55), Serbia (56), and Moldova (60), but ranks visibly below North Macedonia (67), Albania (68), and Montenegro (69).

Unlike other democracy-related domains, the media is relatively better-performing, ranking above all EU candidate countries in RSF's Press Freedom Index in 2025. Social media is the main source of information. Online media is strong and often acting in a watchdog role.

Broadcast and print media is highly polarized, split between the authorities and the businesspeople loyal to the opposition figures from the previous government. The opposition-affiliated media often speaks about pressure from the authorities.

Armenia is not yet ready to meet EU's Copenhagen Criteria. Major structural issues remain outstanding,

Armenia is not yet ready to meet the EU's Copenhagen Criteria, particularly with regard to democracy, the rule of law, and human rights protections. If Armenia and the EU were to pursue closer integration, they would need to address major structural issues affecting governance and policy-making, including corruption, judiciary independence, and electoral irregularities.

Importantly, successful reform would require a more holistic, whole-of-society approach, involving broader consensus across the political spectrum.

Administrative capacity to implement EU legislation (rules, standards, policies)

The public administration is fairly large in Armenia, comprising nearly a quarter of the total workforce (around 270,000 employees). Despite its size and ongoing efforts to implement structural reforms, the administration remains relatively weak.

The EaP Index, which assesses approximation and convergence with/towards EU norms, laws, and policies, identified several challenges in 2025. These include limited legal guarantees for professional neutrality, uncompetitive salaries, talent retention, loose performance evaluation systems, and a lack of meaningful public consultation mechanisms. The Index also highlights insufficient autonomy for local authorities.

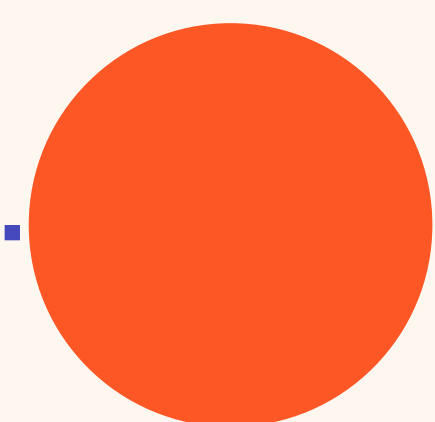
Overall, the report concludes that public administration in Armenia is significantly weaker than in Georgia and Moldova.

Additionally, according to other reports, weaknesses persist in strategic planning, monitoring, and public finance management. There appears to be both a shortage of relevant skills and considerable resistance to change within the civil service.

Public administration reform is part of CEPA. Armenia has also invested in digitalization of services. Additionally, border and customs systems compatibility is part of the Visa Liberalization Action Plan.

Armenia is yet not ready to fulfill another criterion for EU membership, specifically the capacity to effectively implement the EU legislation (the 'acquis').

This challenge can be overcome with enough political and financial investment, as well as by sharing best practices from the EU, but the pace of reforms has – so far – been insufficient to catch up with EU standards. It is questionable whether the EU will be willing or able, given the financial challenges, to adequately assist Yerevan in this regard.



Current state of Armenia-EU Relations:

Economy

Physical connectivity with European Union

Armenia is a landlocked country. Its borders with Turkey and Azerbaijan have been closed since the first Nagorno-Karabakh war.

As a result, Armenia has connected to the outside world primarily through Georgia – either by land to Russia or via Georgian ports to Russia and Europe – or through its southern border with Iran.

Neither route is ideal for trade with the EU due to logistical (and sometimes, political complications). The opening of Turkish and Azerbaijani borders, along with the unblocking of regional transit infrastructure, as entailed by the TRIPP project, would be a potential game-changer for Armenia.

First, it would allow the country to diversify its trade routes – potentially redirecting them from Russia and Georgia to Turkey and onward to the EU – and could position Armenia as a transit hub for East-West trade. Even then, Armenia would still remain vulnerable to geopolitical dynamics and competing interests of regional powers, especially since much of its transit infrastructure is in the hands of Russians.

Share of EU-bound trade in the Armenian economy

EU-Armenia bilateral trade is regulated by a Comprehensive and Enhanced Partnership Agreement (CEPA), in force since 2021.

Armenia's overall trade turnover in 2024 stood at USD 30.1 billion, including 12.4 billion with Russia, accounting for 41.1% of the total trade. This was followed by the United Arab Emirates with 5.3 billion (17.7%) and China with 2.8 billion (9.4%). The EU came fourth with 2.3 billion (7.7%).

Armenia's exports stood at USD 13.1 billion in 2024, including 5.2 billion to the UAE (40.1%), 3.2 billion to Russia (24.1%), 1.1 billion to China (5%), and 0.6 billion to the EU (4.7%). Imports amounted to USD 17 billion, including 9.2 billion from Russia (54.1%), 1.7 billion from the EU (10.1%), and 1.7 billion from China

(10.1%). The key trade commodities were precious metals and ores, machinery/equipment, and minerals. The key export commodities with the EU were manufactured goods and mining products.

For comparison, in 2024, exports to the European Union stood at 8.7% in Georgia, while its imports were at 27.2%, both higher than the figures of Armenia. The difference is more pronounced with Moldova. Here, 67.2% of all exports in 2024 went to the EU, with 50.1% of goods imported from there.

While strong economic ties with Russia have been a key feature of the Armenian economy since the early 1990s, especially in the agriculture and energy sectors, the share of trade with the EU has not always been low (although the actual volume of trade has remained more or less the same).

In 2011, Armenia's exports to the EU stood at 0.6 billion (45.5%), nearly three times the amount of exports to Russia, 0.2 billion (16.7%), while imports were 1.2 billion from the EU (28.2%), also higher than that from Russia, 0.9 billion (21.5%). Similarly, in 2018, Armenia's exports to the EU stood at 0.7 billion (28.3%), while imports were 1.1 billion (23.2%). By the same year, exports to Russia had increased to 0.7 billion (16.7%), and imports were up to 1.3 billion (25.3%), likely due to the effect of the Eurasian Economic Union established in 2015.

Armenia remains dependent on Russia, particularly for imports, with more than half of all imported goods originating there. They also show that the EU accounts for only a small share of the overall turnover, with the trade being largely import-driven.

If Armenia were granted trade preferences, its trade with the EU would increase, which would – in turn – strengthen the drive and support for more political integration. Nonetheless, Armenia's bilateral trade will never reach the level of Moldova, considering the country's geographic distance and its dependence on more traditional markets, such as Russia.

Current state of Armenia-EU relations:

Economy (...)

Comparison with candidate and member states

GDP per capita – which measures the level of economic well-being – stood at USD 8,500 in Armenia in 2024, lower than that of all candidate countries in Western Balkans and Eastern Neighborhood except Moldova (USD 7,617) and Ukraine (USD 5,389).

In comparison, in 2024, GDP per capita was recorded at USD 8,957 in Bosnia and Herzegovina, USD 9,193 in Georgia, USD 9,310 in North Macedonia, USD 10,011 in Albania, USD 12,935 in Montenegro, and USD 13,523 in Serbia. Armenia's level is also visibly below that of the most recent EU member states – Croatia (USD 23,931), Romania (USD 20,072), and Bulgaria (USD 17,412) – and is approximately five times lower than the European Union average (USD 43,145).

This suggests that while Armenia could potentially narrow the gap with other candidate countries in the next few years, reaching the level of economic prosperity in current EU member states, and especially of more advanced Western European countries, would be a lengthy process.

If Armenia were to advance on its European path, certain trade restrictions are likely to be imposed from Russia, worsening the socio-economic situation in the country, and given the structural dependence on Russia, this process may be lengthy. Consequently, this raises questions about the potential availability of EU's accession funds, and, by extension, of cohesion funds.

Given Armenia's relatively small population, supporting its socio-economic convergence would not be excessively costly. For comparison, Moldova – a country of similar size and economic structure – was granted EUR 1.9 billion in assistance for reforms for the period 2025-2027 (roughly 0.6 billion per year).

Additionally, Bulgaria, which has roughly twice Armenia's population and nearly twice its GDP per capita, is eligible to receive EUR 11 billion from cohesion funds for 2021-2027 (roughly

0.4 billion per year). This suggests that Armenia's accession would require approximately EUR 500 million per year to support stabilization and development in the short-term – an amount well within the existing EU budget.

To sum up, Armenia's economy is in an unfavorable state, but with enough investment and assistance (and ideally, also broad de-isolation of its economy) rapid growth is attainable.

Still, it is likely that the country would remain a net-receiver of assistance in the nearest decade (both as a candidate and a member), but its relatively small size would make it easier for the EU to absorb the challenge.

Armenia's economy is in unfavorable state, but with enough investment rapid growth is attainable. Still, the country will remain a net-recipient of EU assistance in the nearest decade.

Convergence with EU policies

Alignment with common foreign and security policy

The European Commission's Partnership Implementation Report indicates that Armenia's alignment with the EU in the field of foreign and security policy (with statements issued on behalf of the EU and Council decisions) has continued to increase. In 2025, it stood at 37%, up from 7% in 2022.

This is a formidable number considering that CEPA – the agreement governing bilateral relations – contains only loose provisions regarding Armenia's alignment with the EU's Common Foreign and Security Policy (CFSP).

A number of reports indicate that Armenia's alignment with the EU has indeed grown, both rhetorically and in practice. For instance, the European Parliament's annual report on the implementation of the Common Foreign and Security Policy welcomes Armenia's decision to suspend its participation in the Russia-led CSTO and expresses support for Yerevan's request that Russia withdraw its border guards from Yerevan airport and from the Armenia-Iran crossing point in Agarak.

In parallel, meetings held under the EU-Armenia Political and Security Dialogue and the EU-Armenia Partnership Council have become more regular. Additionally, the EU has deployed a civilian monitoring mission to Armenia and provided non-lethal military assistance to the armed forces of Armenia. At the same time, the EU has increased the frequency and clarity of its statements in support of Armenia's sovereignty and territorial integrity.

Despite progress in these areas, issues remain in terms of practical convergence. Following the Russian invasion of Ukraine in 2022, Yerevan adopted a cautious approach, shaped by its security dependence on Russia and its complex relations with Turkey, Azerbaijan, and Iran.

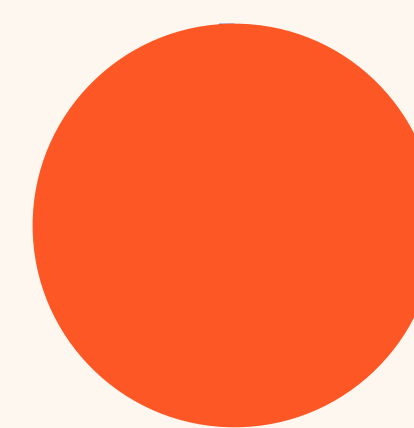
Armenia declined to join the EU sanctions against Russia, citing potential economic and security repercussions. At the same time, Russia continued to wield considerable influence over Armenia, especially through economic and energy ties, and to a lesser extent in domestic politics.

Armenia is still formally a member of the CSTO, and it continues to benefit from its membership in the EAEU, not least due to increased redirected trade flows since the invasion. High-level meetings with Russia are also regular. The EU considers the risk of bypassing EU sanctions via Armenia as "an issue of concern", especially in terms of trade of sensitive battlefield items.

If Armenia was to pursue a membership bid, it would be formally required to align with CFSP.

Considering the geopolitical circumstances, especially with respect to its complex relations with Russia and Iran, it is difficult to imagine how Armenia could fully commit to EU external and security policies. It is also unclear how participation with EEA is compatible with Armenia's candidacy, or membership. As a result, full alignment with the common foreign and security policy will likely remain unrealistic.

Armenia's compliance rate with CFSP is remarkable, considering its position. Yet, it is difficult to imagine, for Armenia to fully comply, given its geopolitical circumstances.



Outlook

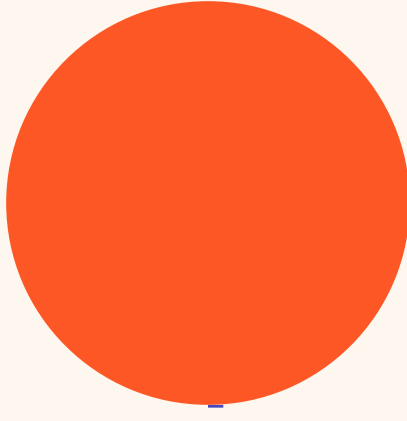
The short-term success of Armenia's "European" project - that is, whether the authorities in Yerevan will remain EU-friendly or whether it will have enough popular mandate to implement painful reforms required for closer European integration - will largely depend on the June 2026 Parliamentary elections, in which Pashinyan's Civil Contract party will compete against a constellation of broadly pro-Russian groups.

The longer-term success will depend on broader geopolitical context, including the resolution of the Azerbaijan-Armenia conflict (and subsequent settlement of relations with Turkey), as well as the end of the war in Ukraine. Domestically, it will hinge on the emergence of a clearly pro-European opposition party capable of challenging the government. Such a force would channel the preferences of disillusioned pro-European voters and help prevent the re-emergence of pro-Russian forces as the primary alternative.

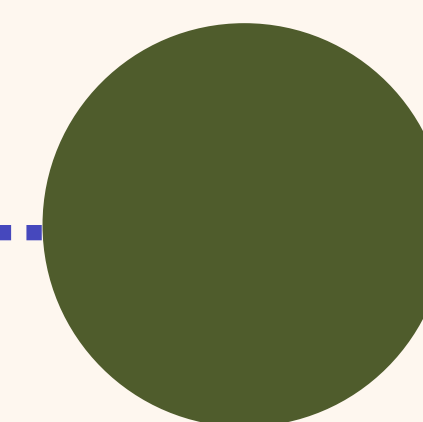
If Brussels reciprocates to Armenia's pivot at commensurate level, gradual approximation in terms of domestic and external policies is possible, but if in-country factors such as popular support, political and legal convergence, and administrative capacity can be increased over time, structural barriers such as geographic distance and dependence on Russia will serve as serious barriers to Armenia's European vocation.

The TRIPP project, and more generally, improved ties between Yerevan, Ankara and Baku may play a positive role, but with Georgia drifting away from the EU and with Russia making gains in Ukraine, Armenia's position will remain precarious.

if Yerevan decides to apply for membership, Brussels will likely endorse the bid, but actual accession will remain unrealistic in foreseeable future. On the Brussels side, the EU's ability to reciprocate to Armenia's pivot, offering investments and support in administrative and governance reforms, economic growth and recovery, and regional connectivity is contingent on the dynamics of accession of the current candidate countries. EU is likely to grant Armenia the visa-free regime, which will promote physical and people-to-people connections, subsequently increasing popular support and economic exchange.



EU's ability to reciprocate to Armenia's pivot, offering investments and support in administrative and governance reforms, economic growth and recovery, and regional connectivity is contingent on the dynamics of accession of the current candidate countries.



3. Context

January 1-15 in Review: Politics, Narratives, Prospects

The first two weeks of 2026 were marked by relative calm, aside from the arrest of former Georgian Prime Minister **Irakli Garibashvili**, who is set to serve five years in prison under a plea deal in a serious money-laundering case. Protests continued throughout the period, with occasional larger marches, including one marking the anniversary of the arrest of journalist Mzia Amaghlobeli.

Below is a breakdown of key developments in the first two weeks of December in Georgia's domestic politics, foreign policy, media, and economy, along with a glimpse of what to expect.

Domestic Politics

Courts are currently hearing so-called “sidewalk cases,” with an estimated twenty-plus protesters facing administrative detention, and the risk of criminal charges in the event of repeat offenses, for “obstructing pedestrian traffic” under the new legislation that took effect in December. Judges, however, have so far postponed issuing the first ruling, which would set a precedent, repeatedly adjourning hearings in several cases.

The effects of the increasingly restrictive environment have also been felt across the media and civil society. Euronews Georgia, the local franchise of the international broadcaster, which has reported on both local and international developments for more than five years, announced it would scale back its Georgia operations and retain only international coverage, citing financial constraints. Meanwhile, Rights Georgia, a human rights watchdog formerly known as Article 42 of the Constitution and active since the 1990s, halted its activities amid the ongoing crackdown.

Foreign Policy

Tbilisi's reaction to the U.S. attack on Venezuela and the capture of Nicolás Maduro was measured, expressing hope that the recent events could prompt Caracas to reverse its recognition of Georgia's Russian-occupied regions. The developments have also divided opinion among Georgian commentators, with some

welcoming what they see as the reemergence of U.S. dominance, while others warn of a return to an international order governed by sphere-of-influence logic.

Georgian Dream government officials undertook their first official trip of the year to the United Arab Emirates, with the multi-day visit featuring meetings and panel discussions focused on the Middle Corridor, investment opportunities, and broader economic ties.

In January, Georgian authorities repeatedly emphasized their compliance with international sanctions regarding vessel traffic along the country's coastline. This included a statement regarding a Liberian-flagged vessel that delivered crude oil to Georgia's Kulevi port from a Russian company, which Tbilisi said was not subject to sanctions, as well as the brief detention of a tanker, previously reported to be registered under the Russian flag, over navigation violations. Separately, it was reported in January that part of the crew of *Marinera*, a Russian-flagged oil tanker seized by the United States in the North Atlantic on January 7, included Georgian citizens, including the vessel's captain.

Economy

Georgia entered 2026 with what the central bank described as “historic-high” international reserves exceeding USD 6 billion, reflecting continued reserve purchases amid macroeconomic stability. The bank also said inflation had begun to

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normalize, noting that long-term inflation expectations remain below the targeted 3 percent level. At the same time, however, authorities have continued to highlight concerns over high grocery prices, with the State Security Service launching an inquiry followed by the establishment of a government commission to examine the issue.

Amid ongoing uncertainty in Georgia–U.S. relations, officials from the Georgian Economy Ministry hosted Carl Kress, Regional Director for Europe, Eurasia, the Middle East, and North Africa at the U.S. Trade and Development Agency (USTDA).

The meeting focused on priorities for future cooperation, including the development of the Middle Corridor. According to the Ministry, the visit also included assessing transport corridor opportunities in Armenia, Azerbaijan, and Bosnia and Herzegovina.

In January, Russia’s state-owned energy giant Gazprom also said it supplied 40.4% more gas to Georgia in 2025 compared to the previous year.

Discourses

Around the New Year, Georgian Dream officials promoted a narrative portraying the EU as being in decline, citing economic challenges, a perceived loss of identity, and declining welfare.

The narrative was particularly promoted by Prime Minister Irakli Kobakhidze, through a series of interviews with pro-government media and public remarks.

Officials framed the EU’s difficulties as an opportunity for eventual reform and a possible reset in relations with Georgia. Kobakhidze also repeatedly implied that the same arguments had been voiced by the Trump administration.

Prospects

Expectations have been building about a possible pardon for some individuals considered political prisoners. Georgian Dream-elected President Mikheil Kavelashvili indirectly suggested that a decision could be made by Epiphany on January 19, though he did not specify who might be affected. More than 100 people remain in prison on criminal charges following arrests linked to ongoing protests and the broader opposition crackdown.

From late January into February, two jailed political leaders, Nika Gvaramia of Ahali/Coalition for Change and Giorgi Vashadze of Strategy Agmashenebeli, are expected to be released after serving full sentences for defying summonses from Georgian Dream’s parliamentary commission. Both leaders face separate criminal charges in a “sabotage” case announced in October, with prosecutors expected to request bail in their cases as well.

Zurab Japaridze, who was recently released after serving a similar sentence and is also facing “sabotage” charges, reversed his earlier principled stance and posted bail, with other opposition figures expected to follow suit.

Following a critical visa suspension report published in December, the EU is expected to suspend visa-free travel for Georgian diplomatic passport holders in January. Brussels had implemented similar measures against holders of diplomatic passports earlier in 2025, and senior Georgian officials have since acknowledged that they need visas to travel to certain European countries.

The new EU Commission report clarifies that the regulations are intended to ensure “a uniform application” across all member states, meaning that no bilateral exemptions will be allowed for holders of such passports this time.

