

Vance in Armenia – A Tailwind for Yerevan?

As the first U.S. Vice President, JD Vance visits Armenia- TRIPP, defense cooperation, and new momentum in the peace process.

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For the first time, a U.S. Vice President visited Armenia — arriving not only with investment pledges, but with a broader geopolitical offer. TRIPP, nuclear cooperation, and new arms agreements signal a qualitative deepening of relations between Washington and Yerevan. For Prime Minister Pashinyan, this provides momentum in an election year; for Russia and Iran, it marks a further shift in the regional balance of power. The EU, in turn, faces the question of whether and how it can play an active role in shaping this emerging dynamic in the years ahead.

A First with Strategic Implications

On February 9, 2026, a U.S. Vice President visited the Republic of Armenia for the first time. JD Vance's visit to Yerevan not only marks a symbolic milestone in bilateral relations but also comes at a time of profound geopolitical shifts in the South Caucasus. The focus was on the operational implementation of the "Trump Route for International Peace and Prosperity" (TRIPP), new agreements on nuclear and technological cooperation, and political backing for the still outstanding peace treaty between Armenia and Azerbaijan.

The visit took place just months before the parliamentary elections scheduled for June 7, 2026, and provided Prime Minister Nikol Pashinyan with visible international support. In doing so, the United States underscores its continuing and growing claim to play a shaping role in the South Caucasus – offering opportunities for regional stabilization while altering the balance of power in ways that could also entail risks. More than before, the U.S. is now relying on economic interdependence to safeguard its own interests and promote regional stability.

TRIPP as a Geopolitical Lever

As early as January 2026, Armenia and the United States presented the TRIPP Implementation Framework (TIF).¹ TRIPP envisions a long-term – multi-decade – majority stake (74 percent) by American actors in key infrastructure in Armenia's Syunik province. As a "neutral third party," the U.S. intends to moderate both Armenian sovereignty concerns and Azerbaijani security interests.

The project is based on the Washington Agreement signed in August 2025.² For Azerbaijan, TRIPP offers a direct connection to its own exclave Nakhichevan and, prospectively, to Türkiye. For Washington, the project is also motivated by economic and raw materials policy considerations: securing critical supply chains – for example for copper or lithium – has ranked high on the foreign policy agenda since "Project Vault."³

At the same time, the formal peace treaty between Yerevan and Baku remains pending. Pashinyan confirmed to Vance his participation in the "Board of Peace" (BoP) initiated by Donald Trump. European actors view this format

critically, as it potentially creates parallel structures to existing multilateral institutions. Armenia's participation nevertheless signals a clear strategic decision to align more closely with Washington – even potentially at the expense of traditional partners.

Tehran in particular had voiced strong reservations about TRIPP in advance. A strengthened U.S. presence near Iran's northern border is perceived there as a strategic challenge. However, it remains questionable to what extent Iran currently possesses the political or military leverage to substantially influence the project. Vance's visit did not occur by chance during a phase of heightened U.S. military presence in the Middle East, including preparations for the deployment of another aircraft carrier strike group and additional bomber units to the region.⁴

Nuclear Cooperation and Security Policy Reorientation

A central element of the visit was the signing of a so-called "123 Agreement" on the civilian use of nuclear energy.⁵ The agreement paves the way for U.S. technology exports worth up to nine billion U.S. dollars and could, in the medium term, reduce the role of the Russian state corporation Rosatom, which currently operates the aging Metsamor nuclear power plant in Armenia.⁶ For Yerevan, this represents another step toward diversifying its energy policy.

In addition, the Armenian government confirmed for the first time the purchase of American V-BAT surveillance drones worth eleven million U.S. dollars – Armenia's first acquisition of U.S. defense equipment. The choice of a primarily defensive system underscores efforts to expand military capabilities and diversify defense partnerships without provoking additional complaints from Baku.

In the technology sector, Pashinyan welcomed the export authorization granted to Armenia for NVIDIA chips, which are to be used in a 500-million-dollar data center project. Vance emphasized that this demonstrates the deep

trust between Washington and Yerevan. The aim is to position Armenia as a regional hub for AI and cloud services.⁷

Domestic Dimension: Election Campaign and the Question of Prisoners

Vance's open support for Pashinyan ahead of the elections is likely to have domestic political repercussions in Armenia. Despite sporadic contacts between representatives of the Armenian opposition and actors from the MAGA movement environment, particularly through pro-Kremlin voices such as Tucker Carlson⁸, Washington demonstratively chose cooperation with the incumbent government.

A particularly sensitive issue remained the situation of Armenians detained in Azerbaijan in connection with the Nagorno-Karabakh conflict. Although Baku released four prisoners in January, it ruled out the transfer of the remaining detainees. During Vance's stay, public demonstrations took place in which representatives of civil society and the church called for stronger American mediation. Vance announced that he would raise the issue in talks during his subsequent visit to Baku. While a spokesperson for the Vice President later confirmed that Vance had followed through on this announcement, the extent to which the topic was addressed initially remained unclear.^{9,10}

European Perspective: Between Approval and Strategic Questions

The European Union explicitly welcomed the agreements. Nevertheless, Vance's visit and the advancement of TRIPP mark a visible shift in the regulatory balance of power in the South Caucasus in favor of Washington. At the same time, the European Union remains a partner of growing relevance for Armenia – politically and diplomatically, as well as in economic matters and the implementation of an ambitious reform agenda. It possesses a broad and effective set of instruments to further expand its engagement and exert sustainable influence.

These include "Global Gateway" as a strategic framework for infrastructure and connectivity projects, substantial bilateral investment commitments by individual member states, and continuous support for reform processes under the Eastern Partnership. Added to this is the already announced expansion of technical and economic cooperation in the energy and digital sectors. Taken together, these instruments form a solid foundation for Europe's presence in Armenia. However, they can only achieve their full effect if they are strategically bundled, politically communicated coherently, and visibly implemented.

Although specific framework conditions related to TRIPP are still pending before major investments can be made, and a unified European overall strategy is still in development, Europe is noticeably expanding its presence in Armenia: diplomatic representations are being strengthened in personnel, high-level visits intensified, political dialogue formats expanded, and the process of preparing visa liberalization for Armenians traveling to the EU is progressing. Europe is thus far more than merely an observer of developments.

The fact that the EU does not view the South Caucasus solely as a transit or economic space is underscored in particular by the civilian EU Monitoring Mission in Armenia (EUMA). It represents a security policy engagement with normative aspirations and signals long-term political support to Yerevan. The same applies to the recently signed strategic partnership between Armenia and the European Union, which deepens institutional cooperation and enhances it politically.

Germany also signed a strategic partnership with Armenia in December 2025. Both sides now face the task of concretizing and operationally deepening this partnership. A targeted economic presence in TRIPP-related projects can help

maintain visible European influence and support diversification. At the same time, Berlin should work to avoid institutional marginalization by positioning European initiatives as complementary – rather than competitive – to U.S. formats. In this way, Europe can consolidate its role as an independent, long-term shaping partner in the South Caucasus.

Balancing Act Between Diversification and Dependence

JD Vance's visit was not an isolated diplomatic event but rather an expression of an emerging strategic reordering in the South Caucasus. The diversification of Armenian foreign policy is thus visibly advancing. The deepened orientation toward the West – including a marked rapprochement with the European Union – gains additional political symbolism and institutional substance through this high-level visit. Whether this will truly develop into a historic turning point depends on several factors: first, the successful conclusion and reliable implementation of the peace treaty with Azerbaijan; second, domestic political stability beyond the upcoming parliamentary elections and sustained public support for the political priorities defined by the Pashinyan government; and third, the geopolitical evolution of the region, including developments in and around Russia and Iran as well as the deepening of relations between Yerevan and Ankara.

For the European Union, this phase opens an expanded window of opportunity. Economic presence, regulatory standards, and long-term reform partnerships are areas in which Europe continues to possess comparative advantages. The decisive factor will be to combine strategic clarity with operational consistency and to design European offerings in a way that complements and structurally safeguards Armenia's diversification.

¹ US Embassy in Armenia, <https://am.usembassy.gov/joint-statement-on-the-publication-of-the-u-s-armenia-implementation-framework-for-the-trump-route-for-international-peace-and-prosperity-tripp/>

[2 Historic Breakthrough for Peace in the South Caucasus?](#)

³ Financial Times, <https://www.ft.com/content/0a27adbc-1c8b-4361-9c57-c9f7f53f49d3>

⁴ The Wall Street Journal [Exclusive | Pentagon Prepares Second Aircraft Carrier to Deploy to the Middle East - WSJ](#)

⁵Office of the Prime Minister, <https://www.primeminister.am/en/press-release/item/2026/02/09/Nikol-Pashinyan-I-D-Vance-Announcement/>

⁶ Radio Free Europe <https://www.azatutyun.am/a/33675221.html>

⁷ Armenpress, <https://armenpress.am/en/article/1222010>

⁸ Caucasus Watch, <https://caucasuswatch.de/en/news/tucker-carlson-hosts-karapetyans-allies-as-they-link-armenias-church-dispute-and-karabakh-conflict-to-global-assault-on-christianity.html>

⁹ Radio Free Europe azerbaijan-energy-security-nuclear-partnerships-genocide/33675242.html?utm

¹⁰ Massis Post [Vance Raises Issue of Armenian Prisoners' Release in Baku](#) • MassisPost

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