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GEORGIAN AND US ELECTIONS: DEFINING THE NEXT CHAPTER FOR THE SOUTH CAUCASUS

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Executive Summary

The article examines the significant geopolitical ramifications of the upcoming 2024 elections in the Republic of Georgia and the United States, in relation to the South Caucasus. The authors emphasize the region's importance as a strategic crossroad between Asia and Europe (the New Silk Road), with key energy and trade routes passing through Georgia.

The article outlines the uncertain outcome of Georgia's parliamentary elections (taking place on October 26), detailing three potential scenarios. Each scenario poses different consequences for Georgia's relations with the West, Russia, and China, particularly in terms of the country's Euro-Atlantic aspirations. Similarly, the US election will influence the region's future by influencing the behavior of South Caucasus states and neighboring powers.

Introduction:

The Importance of the South Caucasus

It has been said of the South Caucasus that it produces more history than it can consume. This observation has been particularly apt in the three-plus decades since its states—Armenia, Azerbaijan, and Georgia—gained independence from the Soviet Union. This small but strategically important isthmus between the Caspian and Black Seas has seen all three of its countries involved in wars since they became independent. Georgia lost Abkhazia and Ossetia (around 20percent of its territory) as a result of the 2008 Russian invasion; Azerbaijan took control of the majority Armenian-populated Nagorno-Karabakh after launching a war in 2020 and ousting the entire Armenian population in 2023. Georgia maintains good relations with both Armenia and Azerbaijan.

The region has also played a key role in economic and transportation networks between Asia and Europe. The Baku–Tbilisi–Ceyhan pipeline brings Caspian oil to Europe, and the Baku–Tbilisi–Erzurum pipeline does the same for natural gas. Georgia, a transit country for both projects, is slated to build a new port at Anaklia, which could help the country become a trading hub between Europe and Asia.

Following the Rose Revolution in 2008, Georgia adopted a democratic and pro-Western orientation. However, over the past five to six years, Georgia has been expanding relations with Russia and, more recently, has adopted a range of policies that indicate a shift away from a Western

trajectory toward closer ties with Russia and China. Increased trade with Russia and selecting a Chinese-Singaporean consortium to build the Anaklia port are examples of this. All this while Georgia finally was granted EU candidate status in December 2023, which was later halted as a result of the laws passed by the Georgian government. This fall promises no abatement of the region’s political, economic, and military activity. Georgia’s Euro–Atlantic aspirations are at stake; Armenia is pursuing a policy of diversification and closer ties with the West, while Azerbaijan is strengthening its partnership with Turkey and mending differences with Russia.

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Amid these developments, Georgian voters will go to the polls on October 26 in elections that both the government and the opposition see as having vital consequences. The results of these elections and Georgia’s foreign policy orientation will play an important role in shaping the region’s future.

On November 5, American voters will elect a new president. These elections will also affect the geopolitical future of the South Caucasus, determining the level of US engagement in the region and the behavior of South Caucasus states and neighboring powers.

Georgian Elections

The upcoming Georgian elections are less predictable than any in recent memory. The ruling Georgian Dream (GD) party has been steadily losing popularity and is now polling at 34.4 percent.¹

Meanwhile, the opposition remains fractured, with no single party gaining more votes than GD. As a result, GD is likely to use all the resources at its disposal to win. Unless the opposition forms a single bloc, GD may remain the most powerful party in the parliament, even if it fails to secure a majority of seats.

Scenario 1: Victory of Georgian Dream

If GD wins outright and gains a majority of seats in the parliament, the victory will likely be met with mass protests similar to those that occurred this spring in response to the adoption of the “foreign agents law.” External reactions will be critical at this point. Should GD return to power, the Georgian government will continue what it considers to be “balanced diversification,” further improving relations with Russia and China while attempting to balance the two with the EU and the US. Formal diplomatic relations with Russia are unlikely to be reestablished due to the Russian occupation of Abkhazia and South Ossetia and the fact that most Georgians support joining the European Union (86 percent) and NATO (79 percent).² While a sharp U-turn toward Russia is not realistic in the short term, Georgia will likely increase its economic cooperation with Moscow, seeking to capitalize on re-export opportunities, and the latter will look for ways to expand its economic presence.

Meanwhile, China’s involvement in Georgia’s infrastructure—particularly in constructing the Anaklia seaport—will continue. This will further shift Georgia toward China and help China establish itself as a new actor in the Black Sea, heightening competition among major regional powers.

Relations with the West will continue to deteriorate, depending on the post-election situation and how severe a response Western powers adopt vis-à-vis Tbilisi. The EU and the US may not recognize the results if the elections are considered to have been rigged and are followed by large-scale protests. The EU may formally withdraw Georgia’s candidate status, impose sanctions, and cut financial aid, while NATO may formally rescind its membership pledge to Georgia.

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This scenario will likely draw Georgia closer to Turkey and Azerbaijan, which may align more closely with Russia. Such developments would limit the US and the EU’s capacity to influence the South Caucasus. If the West cuts ties with Georgia, Armenia may become the focus of US and EU attention as the only Western-leaning country in the region. On the one hand, this could result in increased economic and political support from the West for Armenia; on the other, Armenia may end up being isolated, with significant security implications (Armenia has only two open borders—one

with Iran and the other with Georgia), while the West may be unable or unwilling to guarantee its security. In such a case of reinforced isolation, Armenia may also have to move closer to Russia, in line with regional developments.

It is also possible that the US regards the region as lost and reduces its overall engagement; as a result, Armenia may receive less attention from Washington over time, and there is a possibility that Azerbaijan will attack Armenia in an attempt to occupy the Syunik province and establish the so-called “Zangezur Corridor.” Deterioration of EU–Georgia relations would also negatively impact Armenia’s engagement with the EU in the long run. It will be unrealistic to expect Armenia’s EU accession without Georgia, as Armenia will not have any border with an EU member or candidate country. Severed relations with Europe could impact Armenia’s economic and military links with the West, which generally run through Georgia.

However, the West could also choose to maintain dialogue with Georgia in hopes of pro-Western forces coming to power in the 2028 parliamentary elections. If Georgia maintains its relations with the West, Armenia could avoid isolation.

Scenario 2: Power-sharing, with neither GD nor the opposition able to gain a majority in the parliament

This scenario would result in plurality and power-sharing between parties that are at odds with each other—an arrangement with no successful track record in Georgia. In the best case, a power-sharing

government might allow Tbilisi to maintain the benefits of its growing cooperation with Moscow and Beijing while avoiding further damage to its ties with the West—but this would not be easy. Moscow will likely adopt a “wait and see” approach toward a coalition government in Tbilisi. China is likely to remain on the sidelines as long as its economic interests are not threatened.

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A stable coalition government that repeals legislation incompatible with Georgia’s EU and NATO ambitions and reaffirms its commitment to Euro–Atlantic integration could mend the relations with Western backers. However, the challenge is whether Tbilisi can do this without jeopardizing its relationship with Moscow. The Kremlin is satisfied with the current government’s policies and may be reluctant to relinquish the benefits it has gained to allow a more representative Georgian government to take shape. With both Moscow and Western capitals increasingly viewing the situation in Georgia in zero-sum terms, neither side will be eager to yield ground.

The region could benefit if Georgia’s coalition government successfully pursues a pragmatic multivector foreign policy. Georgia

could serve as a neutral meeting place for addressing key regional issues, including talks between Armenia and Azerbaijan or Turkey.

Scenario 3: Victory of the opposition and defeat of the Georgian Dream

While an outright opposition victory appears unlikely, some analysts suggest it remains a possibility.³ A new government might be tempted to launch criminal investigations against leading members of the Georgian Dream, which could lead to political and economic instability.

Russia would respond negatively to an opposition victory and will likely reassess its bilateral relations with Georgia, leveraging its economic and diplomatic power against the new pro-Western government. How far its response goes may depend, in part, on the outcome of the US elections.

China's approach to an opposition victory would likely be more cautious, driven primarily by geoeconomic rather than geopolitical considerations. As long as the new government remains aligned with China's Belt and Road Initiative, Beijing will likely continue its investments in Georgia. However, if the new Georgian government cancels the tender awarded to the Chinese-Singaporean consortium for constructing the Anaklia port and opens a new tender, Beijing could react negatively. In any case, any Chinese response would be through diplomatic and economic measures.

If the opposition proves coherent and stable, the new government is expected to prioritize restarting EU and NATO

integration processes by reaffirming its EU candidate status, resuming progress toward opening accession negotiations, and reassuring NATO of its continued viability as a candidate for membership. The restoration of a pro-Western government in Georgia, combined with a Harris victory in the US election, could accelerate Armenia's pro-Western trajectory and facilitate ties between Armenia and the newly elected Georgian government. Western priorities, in this case, will include facilitating the Western aspirations of both countries and, at the same time, leveraging influence over Azerbaijan to foster regional stability.

US elections

When Americans vote on November 5, 2024, the Georgian election results will already be known. While few Americans will have the South Caucasus in mind as they cast their ballots, the outcome could have significant consequences for the region. In either case, Baku may be tempted to use the transition period in the US to start an escalation on the borders with Armenia to test the red lines of the new collective West. A Harris administration would likely respond to the Georgian election scenarios like the current Biden administration, offering limited diplomatic, economic, and security support to countries pursuing democratization and Western integration while ignoring those that are not. Given that the South Caucasus is not a region where the US has vital security or economic interests, the carrots and sticks it uses there will be fairly moderate.

In scenario 1, where the Georgian Dream is the winner, a Harris administration's response would be a key factor in shaping the region's future. If Western monitors

consider the election to have been rigged or report any electoral manipulation, Georgia's Western partners would likely unanimously condemn the election results and halt Tbilisi's Western integration efforts. Suppose no such large-scale election irregularities are reported, and GD holds onto power. In that case, a Harris administration will likely adopt a pragmatic approach. While the administration may not be ideologically aligned with GD, especially given the party's drift away from Western-oriented reforms, the US is unlikely to take punitive measures against Georgia in the absence of documented electoral manipulation.



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In scenario 2, a Harris administration would likely support a power-sharing arrangement but could lose interest if the Georgian government proves ineffective due to political squabbling. Finally, in scenario 3, a Harris administration would offer strong approval if Georgia returned to a pro-Western path, gradually resuming aid, especially if this shift allows Armenia to pursue a more pro-Western course. It is important, however, to temper regional expectations of American support. Even under a stable opposition government in Tbilisi and a Harris administration in Washington, US support for the region

would remain modest, focusing on building democratic governance, promoting regional economic integration, and enhancing military capabilities while improving interoperability with US and NATO forces.

A Trump administration, on the other hand, could bring a very different approach. Trump's foreign policy tends to focus on personal negotiations that result in "single transaction" agreements. He shuns long-term alliances, preferring to keep the US unburdened by commitments that do not offer immediate, tangible benefits. Trump has also shown a preference for "strong leaders" such as Russia's Vladimir Putin, Hungary's Victor Orban, and Turkey's Recep Tayyip Erdoğan. If GD remains in power, Georgian Prime Minister Irakli Kobakhidze may attempt to position himself as such a figure to attract Trump's attention. Azerbaijan's President Ilham Aliyev may try to do the same, with a better chance of success due to Azerbaijan's oil and gas wealth, which could appeal to Trump's interests.

Trump has also demonstrated a preference for dealing with regional powers. A notable example is when he allowed Erdoğan to persuade him that Turkey could manage its border with Syria. After Trump withdrew US troops from the border with Syria, Erdoğan launched a military operation targeting Kurdish forces backed by the US. Given the volatility of the South Caucasus and the unresolved Armenia–Azerbaijan conflict, similar policies could have a negative effect on regional stability. Additionally, Trump and his advisors are mainly focused on perceived threats from China and Iran.

Trump would likely seek to end the war in Ukraine by freezing aid to force Ukraine into negotiations with Russia. Such a forced negotiation is unlikely to produce sustainable peace. Trump will also aim to reset relations with Russia and focus on confronting China and Iran. Should Trump resume his maximum pressure campaign against Iran, Armenia and Azerbaijan—both of which border Iran—would likely play a role in US strategic calculations. This could present a number of challenges in a region as often unstable as the South Caucasus. At the same time, less tension between the US and Russia would allow the countries in the South Caucasus to pursue a more balanced policy without having to choose sides in a zero-sum game. 🦅

1 “Georgia: Polls and Trends for the Georgian Election 2024,” *PolitPro*, September 29, 2024, <https://politpro.eu/en/georgia>.

2 Hans Gutbrod, “October’s Elections Could Shake Eastern Europe. Opposition Parties Must Offer Proper Statehood and Competent Governance,” *OpenDemocracy*, July 16, 2024, <https://www.opendemocracy.net/en/georgia-elections-opposition-russia-eu/>.

3 “IRI Survey: 86% of Respondents Support Joining the European Union, 79%—Joining NATO,” *Georgia Today*, November 16, 2023, <https://georgiatoday.ge/iri-survey-86-of-respondents-support-joining-the-european-union-79-joining-nato/>.

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