

Implications of a 12 Day Israel-Iran War for the South Caucasus: Reshuffling the Deck or Same Old Geopolitics Still in Play?

Leyla Rustamli ¹

¹ *Philosophy and Sociology Institute of the Azerbaijan National Academy of Sciences*

115 H. Cavid Avenue, Baku, AZ1073, Azerbaijan

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Corresponding Author:

[Leyla Rustamli](#)

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Abstract. Ever since the Islamic Revolution, the world community in general, and the Middle Easterners in particular, had been exposed to the dread of the outbreak of the Israel-Iran war. This danger, which had been looming for four decades, eventually materialised and struck the region as a geostrategic quake on June 13, 2025. The so-called 12 Day War has far-reaching implications not only for the Middle East but also for the South Caucasus, since the security of this region is effectively intertwined with that of the Middle East. On August 9, 2025, after less than three weeks since the end of the Israel-Iran War, Armenia and Azerbaijan initialed peace accord, as well as signed a deal that will reopen a transit corridor linking Azerbaijan to its enclave Nakhchivan, also connecting Asia and Europe named Trump Route for Peace and Prosperity (TRIPP) development rights of which is given to the US. This event marks the shifting geopolitics of the South Caucasus and highlights how developments in the Middle East impact the region. This article examines the immediate outcomes and possible repercussions of the Israel-Iran war for the geopolitics of the South Caucasus region, critically analysing the continuity and change in security perceptions and dynamics of the area.

Keywords: regional security; South Caucasus; Israel; Iran; 12 Day War; Middle East; Azerbaijan.

INTRODUCTION

Two essential premises lie at the core of this article, on which it builds its further arguments: first, the South Caucasus has now reached a point where it can be considered a region from an International Relations perspective; second, it is undeniable that the security of the South Caucasus is inextricable from the security of the Middle East. According to Paul's definition, "...region is a cluster of states that are proximate to each other and are interconnected in spatial, cultural and ideational terms in a significant and distinguishable manner" [1, p. 4]. Based on this definition, the South Caucasian countries, which certainly possess cultural, historical, and geographical proximity, would be viewed as a single region. On the other hand, from the perspective of security studies, in particular Barry Buzan's Regional Security Complex Theory, a region is "...a set of countries whose major security processes ... are so interlinked that their security problems can-

not be analysed or resolved apart from one another" [2, p. 44]. Without delving deeper into the notion of region and regionalism, as it is out of the scope of this article, it should be noted that, although the South Caucasian countries comprised a region as they have shared culture and history, their security orientations, motives, and policies were usually different, at times at odds, which made this geographical area an incoherent region. Armenia's membership in the Russian-led Collective Security Treaty Organisation and its almost complete reliance on Moscow in terms of security, Georgia's resolute commitment to EU and NATO integration, and Azerbaijan's unique close ties with Türkiye illustrate how separate the paths the three Caucasian nations have followed. This situation underwent significant changes initially as a result of the Second Karabakh War, and then due to the Israel-Iran 12 Day War. Currently, the South Caucasus presents exceptional opportunities to enhance regional cooperation and integration, including in the se-

curity sector. The inextricability of South Caucasian security from the processes in the Middle East is primarily contingent upon the fact that two major powers of the Middle East, Iran and Türkiye, are also key players in the South Caucasus. The second necessary preposition is that connectivity becomes a crucial element of consideration for all international and regional actors while projecting their policies. The South Caucasus, in this sense, is the focal point of transit routes connecting the Middle East to Central Asia and Russia, as well as the Caspian Sea to the Black Sea, and Europe to Central Asia and beyond. 12 Day War significantly transformed geopolitical considerations and overall security landscape of the South Caucasus, as it restrained Iranian capabilities to influence the region, reinforced both Israeli and Turkish (albeit it may sound weird) power, paved the way for the US's proactive involvement after a long period of negligence and possibly will invigorate European policies.

Unlike the EU and the USA, which have traditionally approached Azerbaijan, Georgia, and Armenia as a whole, without considering the unique characteristics of each nation, Israel and Iran have developed distinct and nuanced relationships with all three countries in the region.

METHODS

The author employs a qualitative research approach, incorporating historical and comparative analysis, to examine how security calculations in the region have evolved, taking into account the historical context and geopolitical shifts. The resources used mainly include news, newspaper articles, academic journals, and, to a lesser extent, policy reports. The study employs a dual comparison approach, examining, on the one hand, the policies of Iran and Israel regarding the South Caucasian countries, and on the other hand, the policies of the two countries during the pre- and post-2020s periods.

RESULTS AND DISCUSSION

Iranian Relations with the South Caucasian Countries before the 2020s. Iran's regional strategy, which reflects its leadership ambitions, appears rational and natural from Tehran's perspective, as Iran is not an extraneous actor due to its imperial past and geographical proximity. The relations between Iran and Azerbaijan were the most

uneasy of the relations Tehran had with the Caucasian nations. Iran and Azerbaijan have numerous issues, ranging from ideological discrepancies to pragmatic concerns, such as the use of hydrocarbon resources in the Caspian Sea. Mutual distrust constitutes the central leitmotif of the bilateral relations of the two countries. Iran's Islamic regime has huge suspicions towards the secular Azerbaijani government because of its close ties with Tehran's archenemy, Israel. Azerbaijan, on the other hand, finds Iran hypocritical, because the Islamic regime, which extensively employs religious solidarity rhetoric and portrays itself as the protector of Muslims elsewhere, has always sided with Christian Armenia despite the latter's occupation of Azerbaijani territories for more than 30 years, making hundreds of thousands of Azerbaijanis refugees and IDPs in breach of international law. Another significant point of friction is the issue of South Azerbaijan. Azerbaijanis living in the modern Republic of Azerbaijan, as well as in the East and West Azerbaijan, and Ardabil provinces of Iran (which is referred to as South Azerbaijan in relation to the Azerbaijan Republic), are part of the same nation of Azerbaijani Turks. Iranian official narrative claims that Azerbaijanis of Iran and the population north of the Arax River "... despite the use of Turkish language from a cultural, historical and social standpoint belong to the Iranian world" [3, p. 52], and are not marginalised, on the contrary, are well represented in all the state, military, economic, and clerical spheres [3, p. 50]. However, there are data-based studies and an abundance of news which suggest that the Iranian regime systematically suppresses the language, culture and traditions of Azerbaijanis, trying to assimilate them [4–7]. On the other hand, the nationalist discourse in the Republic of Azerbaijan, although not officially endorsed by the government, but rather taking place at a public level, apparently irritates Tehran.

Iran's relations with Armenia are mutually beneficial and built on reciprocal trust and cooperation. The core incentive behind this collaboration is the perception of the Türkiye-Azerbaijan alliance and consequent Turkish influence as a threat by both Iran and Armenia. Landlocked Armenia has open borders only with Iran and Georgia, as Türkiye and Azerbaijan closed their borders since the early 1990s in response to Armenia's invasion of Azerbaijani lands. Relies heavily on Iran for trade, as the latter is Armenia's third-largest economic partner. Iran, which

also has its own fair share of isolation due to the sanctions imposed on it by the US and its allies, views Armenia as a "gateway to the Eurasian economic markets" [8]. The Armenian leadership also invested in improving relations with the Azerbaijani community, bypassing the Azerbaijani government. Armenia, to defuse negative emotions among the Iranian-Azeri population, insisted on closer economic and commercial ties with the Iranian Azeri provinces" [9, p. 41]. The significance of this tie is also contingent on the fact that the Armenia-Iran border is, in fact, the South-Azerbaijan-Armenia border, meaning it is the Azerbaijani provinces of Iran that border Armenia.

As for Georgia, its principal strategic value for Iran lies in its geographic location on the coast of the Black Sea. Iran, as mentioned earlier, faces difficulties in reaching the European market due to US-imposed sanctions. One of the few options Tehran has is gaining access to the Black Sea through Georgia. Diversifying its transit routes is of crucial importance to Iran. One of the international transit projects that Tehran promotes is the Persian Gulf-Black Sea project. This project envisions the delivery of goods from Gulf countries and India through the territories of Iran and Armenia to the Georgian ports, and from there to Bulgaria and Greece. Iran's main objective was to diminish Türkiye's influence by creating an alternative to the Turkish route to Europe. However, with new developments taking place in the region, this project remains conceptual mainly. Moreover, Georgia has also had constraints in developing relations with Iran. Tbilisi's determination to integrate into Western institutions, particularly the US-led NATO, is inherently at odds with Iran's regional strategy.

Israeli relations with the South Caucasian countries before the 2020s. Unlike Iran, Israel is geographically quite far away from the South Caucasus; nevertheless, it has a special interest in the region. After the dissolution of the USSR, Israel reached out to all three South Caucasian countries with the intention of including them in its updated periphery doctrine. However, the regional processes, in particular the Nagorno-Karabakh conflict and strained relations between Iran and Azerbaijan, predetermined the development of Israel's regional strategy, and Azerbaijan became Israel's key ally in the South Caucasus.

Israel and Azerbaijan enjoy one of the most unique relationships between two independent states, which some view as a strategic partnership, others as pragmatic cooperation, and yet others as a marriage of convenience. Regardless of the label, among the three South Caucasian republics, Azerbaijan has the most developed bilateral relations with Israel. Their relations are multifaceted, encompassing economic, military, technological, and cultural cooperation, and are based on mutual interests and shared values. Azerbaijan is one of the largest importers of Israeli weapons, and with its close to 50 % share in the Jewish state's oil needs, it is its key provider of energy resources [10]. People usually describe bilateral relations as high-level, and Azerbaijani president Ilham Aliyev often says, "Israeli-Azerbaijan relations remind me of an iceberg," signifying much deeper and invisible cooperation between the two [11]. Furthermore, Azerbaijan intends to use the Israeli Lobby in the US to counterbalance the outsized influence of the Armenian Lobby, which is immensely successful in promoting anti-Azerbaijan policies in the United States. Without underrating all mentioned aspects, it is essential to note that the most critical pillar of Israel's Azerbaijan policy is the containment of Iran.

Israel-Armenia relations, by virtue of geopolitical realities, were doomed to remain on a relatively low level, since Armenia's second closest partner in the region after Russia has been Iran, Israel's arch nemesis. As mentioned elsewhere above, Israel's key ally in the area is Azerbaijan, which has been Armenia's number one enemy throughout the decades. Unlike the cases of Azerbaijan and Georgia, Armenia doesn't have a local Armenian community of immigrants in Israel with strong economic ties to their homeland that promote bilateral relations. Nor does Armenia host any significant Jewish community, unlike Azerbaijan or Georgia, which would play its part in fostering ties between the two countries. Armenia attempts to revitalise its relations with Israel despite the odds and restraints. Thus, despite Israel's reluctance to reciprocate, in 2019, Yerevan announced that it would open an embassy in Israel, which was implemented in 2020, only to suspend its activity the same year, citing Israeli arms sales to Azerbaijan in the Second Karabakh War [12].

Israel's policy towards Georgia has been coherent since Georgia gained independence. The bilateral relations of these countries receive less

attention from researchers and the media than Israel's relations with Azerbaijan or Armenia; however, Georgia has significance on its own in Tel Aviv's South Caucasian strategy. Alongside economic ties, Georgia's strategic value stems from its location in the energy supply chain of Israel, as it serves as the transit country for the BTC pipeline, a significant route for Azerbaijani oil reaching Israel. Moreover, one of Georgia's main foreign policy priorities has been a strategic partnership with the USA, which is also one of Israel's key allies. In this sense, the geopolitical preferences of Israel and Georgia overlap.

The new developments - reshuffling the deck. As a result of the Second Karabakh War of 2020 and the day military operation of September 2023, Azerbaijan restored its sovereignty and regained complete control over its internationally recognised borders. This development had a colossal impact on the region. One of the tangible reflections of the changes it brought, and relevant to the purposes of this article, was the opening of the Azerbaijani Embassy in Tel Aviv. Despite the sophisticated relations between the two countries that have effectively developed since 1992, Azerbaijan was unwilling to open an embassy in Israel. The rationale behind this move was that Azerbaijan didn't want to risk the support of the Muslim countries, which consistently voted with Azerbaijan in the United Nations Organisation to support its territorial integrity in the conflict with Armenia over Nagorno-Karabakh. With the restoration of its sovereignty, Azerbaijan freed itself from this constraint and began to manoeuvre more confidently in its foreign policy decisions. On March 29, 2023, Azerbaijan inaugurated its first-ever embassy in Israel. Both Israeli and Azerbaijani media praised the unprecedented act as a "historical," "landmark," and "catalyst" event [13–16]. One eye-catching detail in the Israeli news coverage about Azerbaijan is the emphasis on the latter's Muslim and Shia identity; this is important for Israel to accentuate that its conflict with Arab countries doesn't have to do with religion. The timing of the embassy's opening was also significant, as it coincided with the most strained period in Iran-Azerbaijan relations. The Azerbaijani Embassy in Tehran was attacked on January 27, 2023, and suspended its operations on January 30, 2023 [17]. Israel seized the opportunity to strengthen its position in the South Caucasus even more. The Azerbaijani government has also positioned itself as a mediator between Israel and Türkiye, as well as Is-

rael and the new Syrian leadership, which signifies an increasing mingling of the security interests of the two regions [18, 19].

Another important event that fundamentally affected the security landscape of the South Caucasus is Russia's war with Ukraine. As Russia overwhelmingly canalises its economic-military resources into the invasion of Ukraine, Moscow gradually loses its traditional dominance in the South Caucasus. It can also explain the fact that Russia couldn't give any effective reaction to the Israel-Iran War of 2025 and the US strikes in the Iranian nuclear facilities, confining itself to mere condemnation of Israeli and American actions. President Trump stated in his "Face the Nation" address that Iran's nuclear facilities were "totally obliterated", calling the US's "Operation Midnight Hammer" a spectacular military success [20]. Recent expert assessments, on the other hand, reveal that the operations mostly destroyed only one nuclear site out of three, casting doubt on their success [20].

Another desired objective of the Israeli campaign, though not quite embraced by the US government as it conflicted with Donald Trump's foreign policy vision of keeping the US out of protracted wars, regime change in Iran was not successful either. The Iranian regime not only survived but also managed to consolidate its power as the people of Iran gathered around their flag to confront foreign aggression. Despite these failures, the 12 Day War severely weakened Iran's position in the Middle East and the South Caucasus as well. One reverberation of Iran's declining influence in the South Caucasus is Armenia's rapprochement with Azerbaijan and Türkiye. Armenia resisted the opening of the Zangezur Corridor, a proposed transport route envisioned to connect mainland Azerbaijan with its exclave, Nakhchivan, which Azerbaijan had proposed after the 2020 Second Karabakh War, relying on Iran. Tehran is categorically opposing the Corridor because this project not only links Azerbaijan to Nakhchivan, but it also provides a connection between Türkiye and Azerbaijan, and via Azerbaijan, to the Central Asian Turkic Republics. Armenia's resistance was broken after the 12-day Israel-Iran war of 2025, as Iran's positions were weakened, and Yerevan realised this. Thus, on August 8, 2025, Azerbaijan and Armenia initialled a peace treaty that also includes the opening of transport routes, in particular the "Trump Route for International Peace and Prosperity" (TRIPP), which in essence is the Zangezur Corri-

dor. Iran furiously vowed against TRIPP, with a senior adviser to the Supreme Leader, Ali Akbar Velayati, claiming that the Corridor will be "not a gateway but a graveyard for Trump's mercenaries" [21]. Iran's dismay over the strengthening of Türkiye's influence in the South Caucasus is bound up not only with Tehran's traditional fear of Turan, the unity of Turkic peoples, but also with the fact that growing Turkish influence portends growing American presence in the region.

CONCLUSIONS

Game-changing developments are reshaping the South Caucasus, and some of them undoubtedly link to the processes in the Middle East. Similar to the Middle East, the South Caucasus lacks effective institutional arrangements in the security field, which exacerbates the importance of military strength among countries and the balance of power in the region. Russia is losing its traditional dominance over the area, Iran's ambitions are curbed because of the 12 Day war with Israel and the smashing of its proxies, while Türkiye and Azerbaijan are cementing their positions, and Armenia is pursuing a rational policy based on peace with Azerbaijan and involvement in regional connectivity projects that the country needs badly. Georgia, having its own fair share of problems due to the country's political crisis, tries to navigate the geopolitical changes so that its status as a transit hub is preserved. Two extra-regional actors – Israel and the USA are also

reinforcing influence in the region. Azerbaijan seized the opportunity to establish itself as a rising regional power through proactive, multi-vector diplomacy. However, it remains to be seen whether the government will be able to sustain this momentum.

Observers have yet to see the long-term consequences of the Israel-Iran War, and scholars and policymakers still debate the achievements of both Israeli and American operations in annihilating Iran's nuclear capabilities. However, by and large, the 12 Day War signifies a new period in the security dynamics of the Middle East, as well as the South Caucasus, which is reflected in both the foreign policies of Israel and Iran, and in the security considerations of the Caucasian countries. Security issues are increasingly intertwining the South Caucasus with the Middle East, making the region a more cohesive entity. Under these circumstances, all involved actors, regional and non-regional, are in the process of recalibrating their policies to correspond with the new geopolitical realities. Numerous studies focus on different aspects of the security architecture in the Middle Eastern and South Caucasian regions, as well as the geopolitical shifts that both areas are undergoing. While acknowledging the need for further and deeper investigation of the topic, this study aims to contribute to the integrative body of research that explores the tangibility of interregional security dynamics in the Middle East and the South Caucasus.

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