

One Year of TRIPP: Geopolitical and Strategic Implications

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An Assessment of its Geopolitical and Strategic Implications

Introduction

Infrastructure and geopolitics are becoming increasingly connected in the South Caucasus. The creation of new trade and transportation channels is becoming more crucial for both economic connectivity and the strategic objectives of the participating states as conventional patterns of regional influence shift. The Trump Route for International Peace and Prosperity (TRIPP) has become one of the region's most important infrastructure projects in this shifting landscape.

TRIPP is more than just building a new transportation corridor; it is intended to link mainland Azerbaijan with its Nakhchivan exclave via Armenian territory. The project connects more general issues of regional connectivity, foreign investment, and geopolitical impact to the normalization of relations between Armenia and Azerbaijan. Yet its advancement

is taking place within a particularly delicate political and geopolitical context.

This brief looks at TRIPP as part of a larger change in connectivity in the South Caucasus and Eurasia and as a bilateral project between Armenia and Azerbaijan. The project's present status and advancements since the Washington summit in 2025 are taken into consideration first. The broader geopolitical relevance of connectivity and the evolving role of outside players in the area are then examined. Lastly, it evaluates the key issues that could decide if TRIPP becomes a functional and economically viable corridor or remains largely a political framework.

The TRIPP Corridor

The project, which would span the Syunik province of Armenia for about 42–43 kilometers, will include digital connectivity, energy infrastructure, roads and railways (U.S. Department of State, 2026).

President Donald Trump's August 2025 White House summit, where Armenian Prime Minister Nikol Pashinyan and Azerbaijani President Ilham Aliyev signed a joint declaration to end decades of strife, is where TRIPP had its start (U.S. Embassy in Azerbaijan, 2026). The corridor is a well-calculated compromise. While Armenia maintains complete sovereignty, jurisdiction, and operational control over the relevant area and infrastructure, Azerbaijan gains the long-needed overland connection to Nakhchivan. Through a special joint firm in which Washington held a majority stake for the first 49 years, the United States was given a prominent role in the project's development (de Waal et al., 2026).

TRIPP is positioned as a possible part of the larger Middle Corridor, also called the Trans-Caspian International Transport Route, in addition to its bilateral role. In this larger context, the corridor's goal is to lessen dependency on routes that cross Russian territory while enabling east-west connection between Central Asia, the Caspian area, the South Caucasus and Europe (U.S. Department of State, 2026).

The clear connection between infrastructure and peacebuilding sets TRIPP apart from previous corridor concepts. Previous talks over a so-called Zangezur corridor had raised serious concerns in Armenia about security and sovereignty because they were mostly framed in terms of Azerbaijani strategic interests. In contrast, the TRIPP agreement aims to integrate the route into a structure that legally maintains Armenian jurisdiction while separating commercial transit from territorial control. One of the primary concerns about the initiative is whether this distinction can be upheld in reality (de Waal et al., 2026).

Progress After One Year

A year after the Washington summit, TRIPP's work is still mostly preparatory, uneven, and incomplete. The project's current state is still determined

by the disparity between political aspirations and actual execution (Eurasianet, 2026).

Significant progress has been noted on the Azerbaijani side. According to reports, work on the railroad and roadway infrastructure that will link with the Armenian sector is almost finished (U.S. Embassy in Azerbaijan, 2026). Given Azerbaijan's greater financial resources and the long-standing geopolitical importance of establishing a direct land connection with Nakhchivan, this imbalance is not surprising.

Progress has been more constrained and institutional in nature in Armenia. The TRIPP Development Company was founded under a framework agreement between the United States and Armenia, and engineering and technical surveys for the railroad alignment have started. The United States owns a majority stake in this arrangement. The United States also declared in August 2026 that the Trans-Caspian Enterprise Fund, which was initially capitalized at \$201 million and subsequently increased, was now operational with the goal of attracting private investment along the larger Middle Corridor (U.S. Department of State, 2026; Armenpress, 2026).

On the ground, there are already a few tangible outcomes. With regard to Armenia, Azerbaijan has unilaterally removed transit restrictions, allowing the delivery of almost 20,000 tons of oil products and the transportation of roughly 60,000 tons of commodities. The majority of border stability has persisted, and efforts to foster confidence have persisted (U.S. Embassy in Azerbaijan, 2026).

However, the project's most important components are still unrealized. Physical construction of the Armenian section has not yet begun. Because of Baku's persistent demands that Armenia modify constitutional passages pertaining to Nagorno-Karabakh, the ultimate peace deal between Armenia and Azerbaijan is yet to be concluded (OC Media, 2026; Eurasianet, 2026). TRIPP's transition from a framework to a working infrastructure is still unfinished as long as this political barrier exists.

Therefore, the current state of affairs is indicative of a larger trend in Armenia's recent foreign policy: institutional and political participation has progressed more quickly than structural transformation. Although TRIPP has been successful in establishing a new investment and diplomatic framework incorporating the United States, it has not yet resulted in the economic interdependence or physical connectivity that would make a return to war more expensive for both parties. The project's survival will depend more on whether the remaining political obstacles can be overcome and whether building on Armenian territory can start in a reasonable amount of time than on additional announcements.

The Geopolitics of Connectivity

TRIPP illustrates a broader transformation in Eurasian geopolitics, in which connectivity has increasingly become a source of strategic power, economic leverage and political influence. Infrastructure is no longer

simply a means of facilitating trade. Decisions about where railways, roads, energy pipelines and digital networks are built can reshape patterns of economic dependence and determine which states gain influence over regional flows of goods, energy and information. In this context, TRIPP should be understood not simply as a transport project, but as part of a broader effort to reconfigure the South Caucasus and its position within Eurasia.

This shift is particularly significant as Russia's traditional influence over regional connectivity has weakened (Korkmaz, 2026). For decades, Moscow played a central role in shaping the political and economic infrastructure of the South Caucasus. The deterioration of Russia's regional position has created space for new actors and competing connectivity initiatives. According to de Waal et al. (2026), the South Caucasus is increasingly being "rewired" as regional states seek to diversify their economic and strategic relationships and reduce dependence on established routes and infrastructure networks.

Importantly, TRIPP has introduced a new model of regional connectivity. Rather than relying on infrastructure arrangements dominated by a single external power, the project envisages international investment and participation while maintaining Armenian sovereignty over the territory through which the corridor would pass (de Waal et al., 2026). This control over infrastructure can translate into long-term political and economic influence, while diversified ownership and access can reduce the ability of any single actor to exercise disproportionate leverage over regional trade.

While existing transport networks remain vulnerable to geopolitical disruption, the concentration of trade along a limited number of routes can create economic and strategic dependencies. Recent conflicts have demonstrated how quickly political instability can disrupt established supply chains and transportation corridors (Oxford, n.d.). Against this backdrop, additional routes across the South Caucasus can provide greater redundancy and resilience within the wider Eurasian transport system.

This does not necessarily mean that TRIPP will replace existing corridors. Its strategic value may lie in creating an additional route within an increasingly interconnected network. For instance, the Middle Corridor already provides an alternative east-west connection between Central Asia and Europe (de Waal et al., 2026). In this context, TRIPP could complement it by adding another connection through the South Caucasus, increasing the number of available routes and potentially reducing dependence on any single transit pathway.

As governments seek to reduce exposure to geopolitical shocks, the strategic objective is shifting from securing one dominant route to developing multiple viable alternatives (de Waal et al., 2026). Connectivity is consequently becoming less about geographic proximity alone and more about resilience, redundancy and strategic optionality. Within this context, infrastructure projects acquire geopolitical value even before

they reach full commercial potential, as their existence can alter expectations about future trade and investment patterns. Nonetheless, TRIPP's long-term importance will ultimately depend on whether it can attract sufficient commercial activity to become economically sustainable rather than remaining primarily a geopolitical project.

Altogether, connectivity is increasingly being used not simply to facilitate economic exchange, but to reshape strategic relationships, diversify dependencies and create new forms of regional interdependence. TRIPP therefore represents both a response to the changing geopolitical environment and an attempt to shape it.

The Future of TRIPP

Significant questions remain regarding TRIPP's long-term viability. The war in Iran has fundamentally altered the environment in which the corridor is being developed (van Dreven and Zarantoniello, 2026). While TRIPP was initially conceived as a mechanism for strengthening Armenia-Azerbaijan normalization and regional connectivity, the deterioration of the regional security environment has increased the strategic value of alternative routes linking Europe and Asia. This leads to a fundamental paradox: on the one hand, the instability surrounding TRIPP increases the risks to its implementation, while on the other hand, it strengthens the rationale for its development.

Without credible security guarantees and mechanisms for managing potential disruptions, geopolitical uncertainty could increase financing costs and discourage private-sector participation. The corridor's future will thus depend in part on whether its security can be treated as a long-term regional commitment rather than as a temporary outcome of the current diplomatic environment.

Iran will remain a central variable in this equation. The development of a direct route through Armenia would alter existing regional connectivity patterns and reduce Azerbaijan's reliance on Iranian territory for access to Nakhchivan (van Dreven and Zarantoniello, 2026). This could diminish Tehran's economic and strategic leverage in the South Caucasus and reinforce its concerns over any arrangement that could weaken the Armenian-Iranian border or alter existing territorial dynamics (de Waal et al., 2026). TRIPP's long-term viability will consequently also depend on whether its development can be structured in a way that reduces incentives for Iranian obstruction while preserving Armenia's sovereignty and territorial integrity.

At the same time, the disruption of established trade and energy routes is increasing demand for diversified connectivity. Recent geopolitical crises have demonstrated the vulnerability of global supply chains to conflicts affecting major transportation corridors and strategic chokepoints (Oxford, n.d.). This has strengthened interest in alternative overland routes across Eurasia and increased the strategic importance of the South Cau-

casus. TRIPP could therefore become part of a broader effort to diversify connectivity between Europe and Asia, complementing rather than replacing existing routes. Its value will ultimately be determined not simply by the volume of traffic it carries, but by the degree to which it contributes to greater resilience and redundancy within the wider Eurasian transport network.

Its success in moving towards an economically sustainable corridor, instead of a mere political agreement, will require substantial and sustained investment, as well as a strong coordination among states and private actors. Political support will need to survive changes in government and shifts in foreign policy priorities (van Dreven and Zarantoniello, 2026). If TRIPP remains closely identified with a particular US administration, its long-term credibility could be vulnerable to political change. By contrast, embedding the corridor within broader European and international connectivity strategies would provide greater institutional resilience.

Beyond financing and political support, the governance framework established around the corridor requires mechanisms capable of ensuring continuity, transparency and confidence among stakeholders (Aliyev, 2026). A governance model perceived as serving the interests of a single state or administration could generate resistance and undermine investor confidence. By contrast, a broader international framework could help distribute the risks, coordinate investment, and strengthen the corridor's credibility as a neutral transit route. Such arrangements would not only make the project more resilient to political change but could also help insulate it from geopolitical competition by reinforcing its function as a commercial and connectivity initiative rather than a geopolitical instrument.

Taken together, TRIPP's future ultimately depends on resolving persistent challenges related to financing, regional stability, infrastructure security and sustained political commitment. Yet, by connecting peace-building with transport infrastructure, energy security, and digital connectivity, TRIPP reflects a broader shift in how Eurasian connectivity is being conceived. The corridor represents more than a response to changing geopolitical conditions. It is part of a wider effort to shape the future architecture of regional connectivity.

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