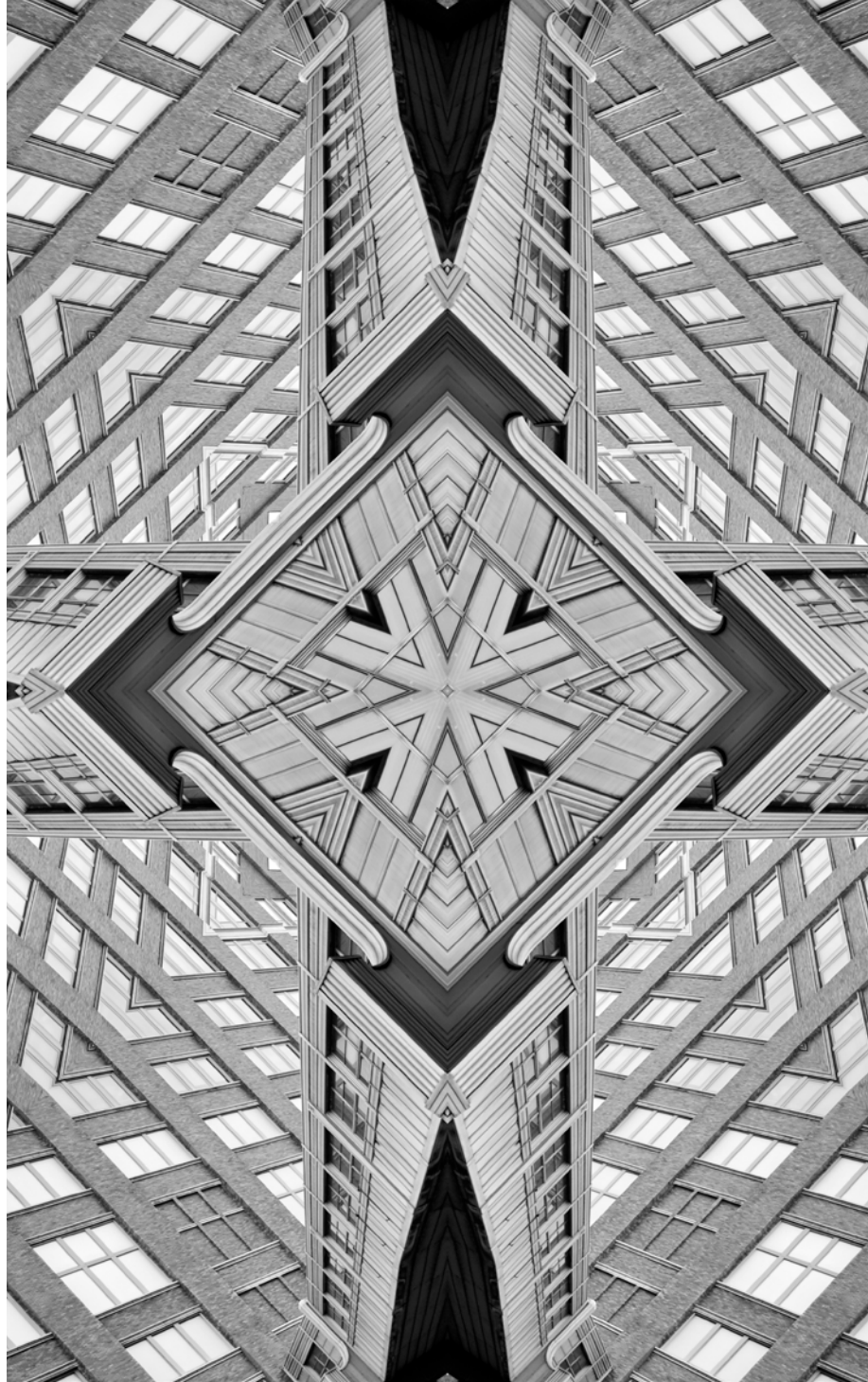


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Brief

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Armenia's Defence Deep-Tech Landscape in a Shifting Regional Order: The Ramifications for India

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Abstract

This brief assesses the growth of Armenia's defence deep-tech landscape, and the geopolitical ramifications of its development for India, in particular. Tracing its historical development and current status in light of the current strategic volatility in the South Caucasus, the brief highlights the scope for closer cooperation between Yerevan and New Delhi in the deep-tech domain, shaped by such factors as issue-based convergences, Armenia's push towards strategic diversification, and industrial bases in both countries that while already established, are also growing further. The brief discusses the opportunities for further cooperation and delves into the geopolitical and economic challenges. It offers recommendations around diplomatic and industrial options that may be deployed by India in pursuit of greater cooperation and a stake within Armenia's burgeoning defence deep-tech sector.

Located between Russia, Iran, and Türkiye, Armenia represents the complexities of the current multipolar world order. The country stands amid worsening ties with its traditional security guarantor Russia and continued volatility along its borders following successive wars with Türkiye-backed Azerbaijan and the loss of its exclave Artsakh in 2023.¹ Yerevan is thus undertaking efforts to diversify and strengthen its relationships with varied partners, from the United States (US) and France to Iran and India.²

With New Delhi, Armenia's strategic partnership is also driven by three additional immediate reasons beyond its own longer term efforts towards insuring itself against global geopolitical volatility. First, the advantages India presents as a defence and security partner to Armenia; second, the growth of Armenia's indigenous defence deep-tech ecosystem, involving both the government and the private sector; and third, the strategic convergence between New Delhi and Yerevan on key regional security issues. These range from mutual concerns around the emergence of a Turkish-Pakistani security nexus in the Caucasus and its adverse implications for Armenian territorial integrity, and the geopolitical risks facing existing connectivity projects in the region.

This brief situates the emergence and growth of Armenia's defence deep-tech^a landscape over the late 2010s and early 2020s in relation to India's foreign policy objectives vis-à-vis Armenia, the region, and beyond. The brief examines the growth of this deep-tech ecosystem, from Armenia's historical role as the scientific and engineering locus of the Soviet Union to present circumstances in the country catalysing greater domestic investment in this field.^b It also presents an overview of the current defence ecosystem in the country, assessing its current state, domestic and global ambitions, and priorities. The brief assesses the consequent geopolitical opportunities and challenges for India, and outlines a set of recommendations for growth in cooperation.

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- a While 'deep-tech' is a term that is amorphous in definition, this brief builds on the framing proposed by such scholars as Schuh et al., that deep-tech innovations "refer to breakthrough scientific and technological discoveries that demonstrate significant advances over existing technologies" characterised by "technological novelty and sophistication", making them "unique and difficult to imitate or substitute" (See: Günther Schuh, Bastian Studerus, and Carsten Hämmerle, "Development of a Life Cycle Model for Deep Tech Startups," *Journal of Production Systems and Logistics* 2, no. 5 (2022)). Given the subject matter of the paper, the "significant advances" in question will be limited to the realm of defence and security, with a focus on their corollary impact on Indo-Armenian relations and foreign policy.
- b While the analysis in this paper is primarily guided by secondary literature, evidence from primary data, such as anonymous interviews conducted by the author with persons of interest in Armenia, will support the arguments. When assertions are made based on the latter, they are duly cited.

The Soviet Past

Armenia's defence ecosystem can be traced to the country's role as the engineering and scientific powerhouse of the erstwhile Soviet Union, particularly from the Second World War onward. Armenia's intellectual traditions, natural resources, and proximity to geopolitically contentious neighbours such as North Atlantic Treaty Organisation (NATO) member-state Türkiye allowed the small republic to project outsized influence both within the Soviet Union and externally due to significant investments in its industrial and manufacturing base.³ By the 1950s, the Armenian Soviet Socialist Republic (SSR) engineering institutes had become among the best in the USSR, pioneering developments in early computer engineering with the establishment of the Yerevan Computer Research Institute in 1956 and catalysing research and development resulting in the production of new computer models in the Soviet Union, from Aragats (1958 onwards) to Nairi (1964) and Razdan (1958), among others.⁴

The Armenian SSR was also known for the production and design of electronics, such as transistors and silicon chips that drove the Soviet economy, as well as nuclear energy production, which was meant as a form of extended deterrence against potential NATO aggression from the West.⁵ Likewise, Soviet space technology in the 1960s and 1970s was pioneered by advances in computer engineering in Armenia, led by Armenian scientists such as Alexander Kemurdzhian, who designed the Lunokhod line of Soviet lunar rovers in the 1970s.⁶

With the collapse of the Soviet Union, much of the funding available for research and development available for Armenian scientists and innovators dissipated. Yet the industrial base established in this time stayed. In recent years, it has gained new importance for Armenia and its strategic partners, as the crucible within the country's defence ecosystem has evolved over the past decade. This industrial base also generates opportunities for extraregional stakeholders such as India.

Wars with Azerbaijan

Armenia's post-Soviet wars with Azerbaijan have underscored its geostrategic vulnerabilities as a small and landlocked nation bordered by two hostile neighbours in the east and west^c and increasingly at risk from its security guarantor-turned-foe, Russia. Wars with Azerbaijan in 2016 and 2020

^c Azerbaijan and Türkiye, respectively.

over the disputed Nagorno-Karabakh region have reiterated the need for Armenia to develop a domestic defence ecosystem, insulating it—at least to some extent—from the political preconditions attached by external parties. Senior sources in Armenian defence deep-tech companies have stressed that the initial impetus for Armenia to develop a technologically driven defence ecosystem complementing its wider national security interests can be traced to 2016, during the country’s four-day war with Azerbaijan over Nagorno-Karabakh, when Moscow put pressure on Yerevan to make concessions to end the conflict—a development that diminished positive public perceptions of Russia among the Armenian population from 80 percent to 64 percent.^{7,8} Subsequent wars with Azerbaijan in 2020 and 2023, alongside resentment and security concerns due to Russia’s Declaration of Allied Cooperation with Baku have added to a sense of urgency. This has resulted in the development of defence industrial facilities and a business landscape conducive for a cohesive domestic defence ecosystem that is now being viewed not just as desirable but critical for the country’s national security.^{9,10}

The Current Situation

Complementary policies of diversification and indigenous design and production in the defence sector appear to have insulated Armenia from overdependence on any single party.¹¹ Having withdrawn from the Russia-led Collective Security Treaty Organisation (CSTO) in mid-2024, Armenia is now looking to continue diversifying and scaling up its strategic partnerships with various countries. To this end, the presence of a dynamic innovation ecosystem focused on defence and dual-use deep tech not only serves as a device of national resilience but also externally buttresses its claims within the region and beyond as a hub for defence innovation.

Amid the war with Azerbaijan, Armenian defence startups today are primarily focusing on technologies such as loitering munitions and autonomous/semi-autonomous weapons platforms, which determined the outcomes of the Nagorno-Karabakh wars of both 2020 and 2023.¹² The fledgling yet rapid emergence of a domestic design and manufacturing base focused on such technologies has been facilitated by a number of factors, from the rapid expansion of Armenia’s defence budgets in the early 2020s (which expanded by a hundred times in the past four years alone¹³), the galvanising efforts of the Armenian diaspora—who have played a leading role in domestic unmanned aerial vehicle (UAV) design and production during both wars¹⁴)—and the exchange of technical expertise and manufacturing and design capabilities with partner nations such as India and France at both government and private-sector levels.¹⁵ These changes have also led to the emergence of companies such as the Yerevan-based Zeel AI, which is focused on UAV design

and production and autonomous/semi-autonomous defence platforms like loitering platforms.¹⁶ The pace of these developments demonstrates not just the ambition of Armenia's defence deep-tech landscape but also the efforts of the public and private sectors in the country.

Yet, while Armenia's defence ecosystem remains primarily focused on kinetically oriented defence technologies, such as UAV design and production, loitering munitions, and similar autonomous/semi-autonomous defence platforms, the country seeks to develop capacities in areas such as space weaponry as well as dual-use electronics and components including semiconductor manufacturing and design in partnership with partner countries to insure itself against future foreign aggression.¹⁷

Such opportunities indicate openings for partner states like India to embed themselves within Armenia's defence deep-tech landscape, both to augment the scale of bilateral cooperation and to embed itself as a stakeholder within the geopolitics of the South Caucasus. Yerevan's efforts to diversify its strategic partners have attracted the attention of governments that are willing to exchange their technological and industrial services for diplomatic influence. The Armenian diaspora, particularly in the US, has been a key intermediary facilitating technological cooperation between the two countries, with Microsoft setting up an innovation centre in Yerevan in 2011, followed by US software and hardware company NVIDIA in 2022.¹⁸

Likewise, and influenced in part by bilateral support for technological exchange, France has begun to express an interest in tapping into Armenia's defence and deep-tech sectors, with French defence and tech company Thales establishing its presence in the country through a liaison with Armenian software startups such as Revytech to collaborate on cybersecurity solutions and innovation.^{19,20} The extent of involvement by both governments remains constrained by existing challenges, such as Armenia's landlocked geographic position and investor concerns about stability given its border disputes with Azerbaijan and Türkiye. Nevertheless, the involvement reflects both the potential for bilateral and multilateral cooperation in the defence deep-tech sector as well as the promise of untapped returns becoming available to governments such as India, which may seek to develop these linkages and establish a presence within Armenia's deep-tech sector to achieve its geostrategic ambitions within the Caucasus.

Opportunities

India-Armenia bilateral relations have been on an upward trajectory, primarily due to the centrality of their defence partnership, with India proving to be a reliable defence supplier to Armenia. Starting with a US\$40-million deal in March 2020 to supply Armenia with Swathi weapon-locating radars, Indian military aid to Armenia has become increasingly kinetically focused, notably with the sale of Pinaka missiles in 2023 and the Akash surface-to-air missile (SAM) platforms in August 2024.²¹ The rapid growth of an indigenous defence deep-tech ecosystem in Armenia presents new opportunities for India, especially for emerging technologies and dual-use platforms.

Indian investment and involvement in Armenia's defence deep-tech landscape has been welcome for a number of reasons. First, for Armenia, which seeks to integrate Russian and Western military technologies, India presents an ideal model.²² Despite diminishing defence cooperation with Russia due to strained diplomatic relations, Armenia's defence landscape remains saturated by Russian weaponry.²³ India, in contrast, has successfully balanced its close defence ties with Russia with growing purchases of Western defence platforms and effectively integrated the latter in the country's military systems.²⁴ Armenia's attempts to bolster ties with India highlights its quest to rapidly reservice its existing Russian weapon systems at short notice during wartime and later replace these with Western and Indian defence platforms.²⁵ In this context, India is well placed to enter and leverage gains within Armenia's defence deep-tech landscape, providing technological and industrial know-how to bolster bilateral defence relations and further embed itself within the geopolitics of the South Caucasus to realise strategic dividends in the future.

Second, Armenia also sees India as a key strategic partner helping insulate it against the revived likelihood of regional aggression. Amid tense ties with Russia, traditionally Yerevan's primary security partner, and military defeat in wars with Azerbaijan in the early 2020s, Armenia has sought to widen its strategic partnerships as a defence mechanism—from France, to the European Union (EU) as a whole, to the US, United Kingdom (UK), Gulf Cooperation Council (GCC) states, and even India.²⁶ Defence partnerships, at the levels of both the state and private sector, thus support Yerevan's wider foreign policy interests.

Additionally, despite the growing Sino-Armenian defence partnership, beginning with the bilateral military cooperation agreement signed in January 2012, and seen more recently in the September 2024 visit of Armenian Defence Minister Suren Papikyan to Beijing to parley with his recently appointed counterpart Dong Jun, suspicion remains regarding China and its intentions towards Armenia.^{27,28} Interviews conducted by those working within private defence companies indicate that the private sector, and especially the deep-tech ecosystem, is where this sentiment holds the greatest salience.²⁹ This provides India with a first-mover advantage for embedding itself through expanded linkages with private actors before Beijing—which is also India’s primary strategic rival in its neighbourhood and beyond—can introduce significant economies of scale.

Armenia’s small size, coupled with its landlocked space within the Caucasus, limits the size of the industrial base that it can aspire for within its borders. India’s growing technological prowess, large spaces for industrial production, and proximity to continental and maritime transport corridors connecting its industrial base to African and Middle Eastern markets is considered to be key to the growth of Armenia’s defence deep-tech ecosystem. Additionally, most industry stakeholders view India as a reliable country to partner with to scale up and export dual-use technologies such as Artificial Intelligence (AI), UAV design, semiconductors, and space technology for both Indian and Armenian use as well as for export to markets that are further afield in Africa and West Asia.³⁰

Challenges

A potential relationship between India and Armenia is not without challenges, primarily as the two countries continue to diverge on key issues.³¹ India shares close ties with Israel, whereas Armenia has poor relations with Israel on account of the latter’s intelligence and military support for Azeri forces in the Nagorno-Karabakh wars.³² However, this does not preclude current Indo-Armenian defence cooperation, with private-sector actors prioritising the potential gains from a relationship with India over auxiliary security challenges that may emerge from Israeli involvement in India’s defence-industrial base.³³ Indeed, indications of the Armenian military’s enthusiasm to purchase the Barak surface-to-air missile system—a joint Indo-Israeli project—suggest that Israeli involvement in Indian defence supply chains is a negligible issue for policymakers in Yerevan.³⁴ However, it is likely that these concerns may impact the willingness of either side to scale up cooperation.

Implications for India

India may also have concerns about the security vulnerabilities posed to New Delhi through its involvement in Armenia's defence ecosystem, particularly in the absence of robust and reliable intelligence-sharing frameworks with Armenia. The arrest of a senior Armenian military official by the NSS in 2023 on charges of passing secret information about Indian weapons platforms to an unnamed foreign intelligence service highlights the persisting counterintelligence challenges and the onus on both sides to develop robust security frameworks.³⁵

Finally, the barriers to entry into the Indian defence market pose a persistent issue, and not just for Armenia; there have been numerous objections to tariffs to entry into Indian markets, especially from the US and the UK.^{36,37} However, this issue, like the others, must be mitigated at the institutional level and through negotiations between Indian and Armenian trade officials rather than those in the defence sector.

Ultimately, much of the success of Indo-Armenian defence cooperation—which may be expressed in the extent to which New Delhi is willing to enter Armenia's defence ecosystem as an active stakeholder—is contingent on the trust that both sides have on one another to maintain the security of their technological and defence secrets. A loose threshold will limit the scale of cooperation.

Within the context of these opportunities and challenges, India can undertake a number of steps to secure a position within Armenia's defence deep-tech ecosystem and become a prominent stakeholder in the geopolitics of the South Caucasus while bolstering its relationship with Armenia. Negotiations between Indian and Armenian intelligence officials on the establishment of robust mechanisms for intelligence liaison would have a profound impact, both as a confidence-building measure and as a means to secure Indian involvement in Armenia's defence deep-tech ecosystem. Such steps bolster the confidence of both Armenian and Indian stakeholders in the security of their investments and add an element of cooperation within the India-Armenia bilateral. This is especially important at present, with Armenia's intelligence community undergoing changes, with the establishment of a dedicated external intelligence agency, the Foreign Intelligence Service (FIS), separate from the country's domestic intelligence/counterintelligence service, the National Security Service (NSS).³⁸ With the FIS tasked with constant liaison with private-sector players in Armenia's defence landscape, intelligence cooperation with the agency would provide a solid undergirding to the wider defence bilateral between both countries.³⁹

Research and development exchanges, particularly state-sponsored educational exchanges, may be another means by which to grow interoperability between India and Armenia in science and technology. Armenia hosts a large population of Indian students and there is also a growing number of foreign university campuses on its soil. India may be able to facilitate the exchange of scientific knowledge crucial to the establishment of a robust industrial and defence manufacturing base.^{40,41}

Finally, both sides should establish joint mechanisms to explore avenues for cooperation on emerging technologies within defence cooperation. India has become an emerging hub and adopter of AI technologies for global semiconductor manufacturing and design as well as a global space power. With Armenia seeking to establish an increasingly formalised space agency and national space architecture by late 2025, Armenian officials have expressed interest in establishing joint orbital centres to monitor civilian and satellite movements.⁴² In leveraging its capabilities as an active stakeholder within Armenia's defence deep-tech ecosystem, India could secure a first-mover advantage in this relatively untapped sector.


A key mechanism to achieve this goal may be the formation of bilateral, strategically guided frameworks for information and technological exchange, similar to the India-US Strategic Trade Dialogue (IUSSTD) and the India-

US Critical and Emerging Technologies Initiative (iCET) signed between Washington and New Delhi in 2023 and the Technology Security Initiative signed with the UK in 2024.^{43,44} These initiatives have enabled India to substantiate its growth as a technological power within the region and beyond and establish a precedent when it comes to the negotiation of future bilateral agreements with countries such as Armenia.

Similarly, with an eye on South Block's penchant for "geometric" diplomacy,^d minilateral groupings involving Armenia and led by India may help deepen India's involvement not only in Armenia's defence deep-tech ecosystem but also with like-minded and non-threatening global actors.⁴⁵ Here, too, a precedent exists. The I2U2 grouping—comprising India, Israel, the US, and the United Arab Emirates—aims to facilitate private-sector and technological collaboration and exchange among partner states.⁴⁶ A similar initiative would serve a number of simultaneous strategic purposes: the growth of Indo-Armenian relations, the augmentation of India's strategic foothold in the Caucasus, and deepening ties between partner states, including India's ties with other parties in the grouping. One such partner may be France, which has close defence and technological ties with both India and Armenia. Similarly, Saudi Arabia may be included within such a grouping, given its close ties with India, its establishment of diplomatic ties with Armenia in November 2023, and a détente with its regional rival and Armenia's neighbouring ally Iran amid the escalation of war in the Middle East.^{47,48}

d 'Geometric diplomacy' is the turn of phrase used by observers, including US Ambassador to India Eric Garcetti, to describe India's approach of using smaller, issue-based groupings involving itself and like-minded, diverse state partners to achieve outsized influence on the world stage and position itself as a leader on specific global issues.

Conclusion

Armenia's defence deep-tech landscape, although small, is growing rapidly. The opportunities provided by this growth are immense, especially for countries like India, which may be able to leverage the defence ecosystem—and its own strengths in relation to it—to both bolster its fledgling yet robust ties with Armenia and to position itself as a key extra-regional stakeholder in the geopolitics of the South Caucasus. While the opportunities are accompanied by challenges, deft statecraft from India and correspondent support from Armenian authorities could aid in the achievement of convergent objectives in this critical space. 

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