

# State of affairs in Georgia 2025

In just 12 months, Georgia witnessed the consolidation of an authoritarian regime that took other regimes 5 to 10 years to accomplish. Georgia is currently almost fully de-sovereignized country, captured by the Russian proxy regime with no legitimacy acting against the constitution and the will of Georgian people. It is a deliberate, multi-layered campaign of state capture and repression that, if left unchecked, will destroy the foundations of a pro-Western, pro-democratic anchor in a strategically vital region.

Ruled by the unaccountable and unchecked ruler of the country, oligarch Bidzina Ivanishvili with deeply embedded Russian interests since 2012, Georgia gradually lost all the elements necessary to ensure its democratic and European future and in 2025 finds itself in the state of authoritarian rule. The descent into authoritarianism was particularly steep after the parliamentary elections of November 2024 marred by widespread fraud, vote buying and various irregularities, and described by observers as “fundamentally flawed.” The legitimacy of the results was widely disputed both internally and internationally, fueling mass protests and opposition boycotts. After the consolidation of the one-party rule in Parliament, GD accelerated the consolidation of the autocracy by passing a stream of anti-democratic legislation, incompatible with the aspiration of the Western integration sought by the absolute majority of Georgian citizens.

On 28 November 2024, within days after the announcement of the results of the fraudulent elections they announced that the Georgian Dream government was unilaterally suspending the EU accession and would revive the topic of opening the accession negotiations with the European Union only in 2028. This decision, inconsistent with Article 78 of the Constitution which defines NATO and EU integration as priorities of the Georgian foreign policy, was widely considered as the final pivot of the Georgian Dream from the Western integration of Georgia to return to the Russian sphere of influence. Hours later, Russian president Vladimir Putin praised the move, saying he “admired [Georgian Dream’s] courage and character, which they showed when defending their point of view”.

Massive protest rallies started in November 2024 never ceased and are ongoing for more than 350 days despite widespread violence and torture by police and ruling party-affiliated violent groups against protesters and journalists.

More than 500 peaceful protesters are detained by police forces. Per Amnesty international, at least 300 of them were tortured or otherwise ill-treated during their detention, more than 80 people were hospitalized with serious injuries. More than 50 demonstrators and ordinary citizens are detained on criminal charges and are facing long sentences in prison.

Since June 2025, almost all the leaders of the major pro-Western opposition political parties are behind bars. New charges are brought against imprisoned opposition and civil society leaders, extending their detention indefinitely. The few who remain at liberty are threatened by various repressive methods, pending trials, blackmail, etc. More than 300 representatives of the Georgian Dream party, including Bidzina Ivanishvili & its associates have been sanctioned by UK, US, EU member states and other Western countries.

Having rid itself of any semblance of pro-Western or pro-democracy values, in recent months Ivanishvili’s government has taken major steps towards authoritarian and revisionist forces active in the region and beyond.

The eastern shores of the Black Sea, along with the sole east-west logistics and energy corridor bypassing the territorial control of Iran and Russia, are steadily falling under the control of anti-Western powers.

## GEOPOLITICAL IMPLICATIONS OF AUTHORITARIAN CONSOLIDATION

As expected, the oligarchic State Capture and the resulting authoritarian shift did not escape the attention of Russia and other revisionist powers eager to grab hold of a country once considered a pillar of Western interests in the region. Moreover, the sanctioning of Bidzina Ivanishvili by the U.S. Department of the Treasury’s Office of Foreign Assets Control under the Russian Harmful Foreign Activities Sanctions for human rights abuses and undermining the democratic and European future of the Georgian people “for the benefit of the Russian Federation” revealed disturbing and alarming reality behind once declarative pro-western facade of the Georgian Dream.

Moscow is keen to reap the rewards of its efforts and the resources invested in establishing effective political control over its once pro-Western southern neighbor. The change in the status quo also attracted Iran and China, eager to exploit the long-awaited opening in this strategically important area for Tehran and Beijing.

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## RUSSIA: FROM INFLUENCE TO CONTROL

Based on the geographical, cultural, and historical specifics of Georgia, Russia has traditionally used security, economic/trade, ideological, and religious issues to leverage its influence on Georgian politics. Since the Georgian Dream came to power in 2012, Moscow has achieved significant results in all of these areas, but this trend has accelerated considerably since Putin's Russia's full-scale invasion of Ukraine.

The Georgian Dream's readiness to exacerbate this phenomenon became particularly apparent after February 2022, when Georgian Dream openly departed from the Western approach of isolating Moscow for its criminal actions, instead choosing to increase trade and restore flights to Russia. At the same time, Georgian Dream and propaganda outlets started to actively promote conspiracy theories, claiming that the West was attempting to drag Georgia into a war with Putin and was pushing Tbilisi to open the "second front".

The alarming level of Russian multifaceted influence was evidenced by the unprecedented sanctions imposed by the US State Department on Bidzina Ivanishvili himself and his closest confidant and former Prosecutor General of Georgia, Otar Partskhaladze. Both were designated by the US as people enabling and aiding Russian interests in Georgia. The US named an FSB officer handling Partskhaladze, further lifting the veil on the dealings between the Georgian Dream regime and Russian special services.

## KEY ASPECTS OF GEORGIA'S ECONOMIC DEPENDENCE ON RUSSIA

Georgia's economic dependence on Russia in 2025 remains significant. Georgia's economy relies on Russia mainly through foreign trade (import-export), energy, remittances and tourism. **Remittances:** During the first 5 months of 2025 the inflow money remittances from Russia declined -35% YoY. Despite this decline, Russia remains the third largest source of money transfers, with \$177.1M transferred between January and May 2025. This puts it behind the US \$262.8M and Italy \$244M, respectively. **Trade Relations:** Russia remains one of Georgia's top trading partners. In January-May 2025, the share of the ten largest **import** partner countries in Georgia's total imports amounted to 72.2%, with Russia firmly third with \$808.6M among the top three import partners after the USA \$1.96B and Turkey \$1.75B respectively. Russia remains among top **export** destinations of Georgia during the first 9 months of 2025: Kyrgyzstan (USD 1.08 billion), Kazakhstan (USD 658.5 million), and Russia (USD 543.1 million). In January-September 2025, exports totaled USD 5.1 billion, up 7.7% year-on-year. Per official statistics, Russia's share of the total volume of Georgian wine exports declined from 74% to 58.9% YoY in January-May 2025. However, the Russian market remains the top destination for Georgian wine exports, worth \$57.6M, far ahead of the second most important destination, Poland, with exports worth \$7.4M. Additionally, Russia remains the largest grain supplier to Georgia. **Tourism:** In Q1 2025, Georgia earned \$826M from foreign travel. The top three source countries were again Russia (17% of total), Israel (14%), and Turkey (13%). **Russian Business Presence:** As of November 2025, the number of Russian-owned companies in Georgia reached a historical maximum of 46385, 640% increase in 2021-2025. In 2024, Georgia was ranked 2nd after Thailand in the ranking of real estate purchases by Russians abroad. Foreign citizen deposits in Georgian banks as of April 2025 total GEL 9.3B (\$3.3B), with GEL 3.44B or 37% of those belonging to Russians.

## ENERGY DEPENDENCE

**Natural Gas:** Russia is also an important provider of natural gas, with Georgia sourcing its gas exclusively from Azerbaijan and Russia, with noticeable shifts in supply dynamics. Between January & July 2025, Georgia imported natural gas worth \$236.5 million, up nearly 7% year-on-year.

Payments to Azerbaijan amounted to \$125 million, while imports from the country fell by 6% compared to last year. Payments to Russia reached USD 111.6 million, with imports up by 26% year-on-year.

The trend of decreasing Azerbaijani imports and increasing reliance on Russian gas has continued in 2025. **LPG:** Georgia is highly dependent on Russia for liquefied petroleum gas (LPG), with Russia supplying virtually all of Georgia's LPG imports in recent years. This dependency has increased sharply both in 2023 (16.5% YoY) and 2024 (99% of imported LPG from Russia), making Russia the dominant, and almost exclusive, external source of LPG for Georgia. **Oil:** In 2024, Russia supplied about 698,000 tons of oil to Georgia, worth approximately \$520M, making it the largest source of Georgia's oil imports (far ahead of the second largest supplier, Bulgaria with 221,161 tons of oil, worth \$184M). From January to April 2025, Russia accounted for about 54.9% of Georgia's total oil and petroleum imports by volume, with 289,200 tons out of 526,600 tons imported during that period. Overall, Russia consistently supplies between approximately 44% to 55% of Georgia's oil imports, making it the dominant oil supplier to the country in recent years. **Electricity:** While Russia remains a significant electricity supplier to parts of Georgia, especially Abkhazia, Georgia's overall dependence on Russian electricity imports for its domestic consumption is marginal, and the country maintains a substantial degree of energy independence in electricity.

**Surveillance Technologies:** In April 2022, the Ministry of Internal Affairs confirmed that the Forensic Science Department uses three artificial intelligence software for face, finger-print and weapon recognition. Two of these are owned by Papiilon Systems, a company with links to the Russian security services, and one is owned by a Belarusian company. A cooperation agreement between the security services of Georgia and Belarus has been in force since 2019.

Although the Georgian Dream is now more open about its pro-Russian policies and inclinations, Moscow still regards the GD as a client rather than a partner. While the Kremlin periodically acknowledges the GD's implementation of Russia-friendly policies or adoption of Putin-style legislation, it offers little or nothing in return.

## SANCTION EVASION

Upon closer examination of the policies of the Georgian Dream regime during the three years since Russia's full-scale military aggression against Ukraine in the context of the subsequent economic sanctions and trade restrictions imposed on Moscow, it appears that they play a multifaceted role in the broader sanctions evasion ecosystem alongside China, Central Asian countries etc.: "Destination washing" for transit of goods which are ultimately bound for Russia (For example, in 2024, Georgia's exports to Kyrgyzstan reached USD 1.29B, an 86% increase year-on-year and more than 6900% increase between 2022 and 2025 since the start of the full scale war in Ukraine); The diversion of dual-use goods (for instance, microchip imports to Georgia increased by an extraordinary 33,725% in a single year, rising from just 375 units in 2021 to 130,140 units

in 2022); relocations and hosting of Russian businesses (640% increase to 46385 Russian-owned companies in 2021-2025; 37% of all foreign deposits in Georgian banks); suspicions of origin-laundering of petroleum products etc.

A recent development in the relationship between Russia and Georgia serves as an example of the nature of the relationship between Georgia's ruling regime and Putin's Russia. In October 2025, Russia officially began shipping oil to a newly built refinery in Georgia. The brand new Kulevi oil terminal, which was built with the participation of state investment funds, was inaugurated by the Georgian Dream prime minister, Irakli Kobakhidze. Levan Davitashvili, the former Georgian Dream deputy prime minister and minister of economy, is the chairman of the board. The refinery was constructed and is operated by Black Sea Petroleum, a company formed specifically for this project in 2022. Perhaps more troubling than the reception of Russian oil itself was information uncovered by investigative journalists shortly afterwards. According to media reports, the Georgian owners of Black Sea Petroleum have a close business relationship with the son of Lieutenant-General Alexeyev, acting Deputy Chief of the GRU (Military Intelligence), through their joint ownership of the Russian oil transportation company CDO-Logistics. Alexeyev came to public attention during the so-called 'Prigozhin mutiny', when the infamous Wagner Group marched towards Moscow. Notably, the first shipment to the newly inaugurated refinery originated from RussNeft, a Russian oil company at which General Alexeyev's son was employed prior to establishing his own businesses.

The expansion of Russian-owned entities and the scale of capital flows, the structure of Georgian export-import, the statistical anomalies in dual-use product trade and the overall dynamics of the Georgian economic growth since February 2022 indicates highlight Georgia's emerging role as a critical node in sanctions evasion ecosystem.

### **CHINA - NEW OPENING AT THE BLACK SEA**

Since the mid-2010s, China and the Georgian Dream government have considerably widened their bilateral relationship, elevating it to a strategic partnership and broadening cooperation across political, economic, and cultural spheres. The Belt and Road Initiative (BRI) emerged as a game-changer in this equation, generating greater Chinese interest in the Black Sea-Caspian Sea transit corridor. The strategic partnership agreement between Georgia and China, signed in 2023, appears to mark a turning point in the relationship, with the aim of significantly deepening cooperation. Previously, the Free Trade Agreement between the countries was signed in Beijing in 2017, Georgia being the 1st country in the region having signed such an agreement with China. Chinese citizens have enjoyed visa-free travel to Georgia since September 2023, Beijing reciprocated by granting visa-free travel to Georgian citizens in February 2024.

Following the visa-free agreement and the expansion of direct flights by both countries, there was a noticeable rise in Chinese tourist arrivals (+83% in 2024) and an increase in Chinese business activity in Georgia (a record 291 new Chinese companies were registered in 2024 in Georgia). Furthermore, the central banks of both countries are actively working to strengthen ties, particularly in monetary policy collaboration. Most recently, the Georgian Dream announced its plans to introduce the Chinese language as a second foreign language into the school curriculum.

On 18 April 2025, at the 9<sup>th</sup> meeting of the Sino-Georgian Trade and Economic Cooperation Commission, the sides touted the 17% trade growth, making China Georgia's fourth-largest trading partner.

**Infrastructure and Strategic Projects:** Chinese companies, including state-owned enterprises, are particularly active in implementation of large-scale infrastructure projects in Georgia. As is typical for China in developing countries, its involvement in Georgia has been largely extractive, centered on implementing large-scale road infrastructure projects which are often funded by loans taken by the Georgian government (i.e., to be paid back by Georgian taxpayers) and often from China itself. The actual economic impact of Chinese investment in Georgia remains minimal.

**Anaklia Port:** The Anaklia Deep Sea Port, Georgia's first deep-water container port and a pivotal logistics hub for the wider region, is a strategic infrastructure project of economic, political and social importance not only for the country, but also for the broader region with the potential to transform Georgia's role in regional and global trade. Anaklia port is part of Corridor 2 in the Central Asia Regional Economic Cooperation (CAREC) Program, providing the shortest transit link for landlocked Caucasus and Central Asian countries to Europe and East Asia. The port will considerably enhance the efficiency of the Middle Corridor, a key route for transporting goods from Asia to Europe, bypassing Russia and Iran.

The original Anaklia Deep Sea Port project was suspended in 2020 after the GD government terminated its \$2.5B contract with the Anaklia Development Consortium (American Conti Group International being one of the co-founders of the consortium, and the port's terminal was to be operated by the US company SSA Marine). While the Georgian Dream government claimed that the consortium had failed to fulfill its obligations, investors, experts, and the pro-Western opposition believed that the authorities had deliberately sabotaged the project due to Russia's negative reaction. Indeed, the Kremlin had repeatedly and openly stated that it was opposed to the idea of building a deep-water port in Anaklia, for both geopolitical and economic reasons. The port of Anaklia was widely regarded as a Georgian-American project, with the United States as its main participant and supporter. The then US Secretary of State, Mike Pompeo, had publicly declared his backing for the project, emphasizing its importance both for Georgia and for Western interests in the region. On 29 May 2024, the government announced the Chinese State Corporation China Communications Construction Company Limited (CCCC) as the preliminary winner of the relaunched Anaklia Investor competition. However, one year after this announcement, CCCC still had not been identified as the final winner of the bid. The company can be found in the Office of Foreign Assets Control (OFAC) Non-SDN Chinese Military-Industrial Complex Companies List. The US Department of Defense has identified CCCC as a 'Chinese military company' operating directly or indirectly in the United States. The reorientation of this strategic project and the choice made by the Georgian Dream government provoked negative reactions from the US.

**Poti Free Industrial Zone LLC:** The Poti Free Industrial Zone strategically encompasses the Black Sea port city of Poti, which stands as Georgia's largest and most versatile port and serves as a key juncture within the Caucasian transport corridor. The operation of the Industrial Zone largely depends on the cargo turnover of the biggest sea port of Georgia - Poti Port. 75% of

the Poti Free Industrial Zone LLC is owned by CEFC China Energy, a company involved in international corruption scandals and controversies. Founder of the Georgian Dream Bidzina Ivanishvili and his close business associate Ivane Chkhartishvili own 50% of a company that manages the 75% share owned by CEFC China Energy.

**Highways, Tunnels, Bridges:** China Railway 23rd Bureau Group, subsidiary of China Railway Construction Corporation Ltd. (CRCC), is engaged in building a main highway in Georgia, part of the Middle Corridor international project, as well as in construction of North–South Corridor (Kvesheti–Kobi) Road Project. China Railway Construction Corporation Limited is included in the U.S. Treasury’s NS-CMIC List, subjecting it to investment prohibitions. In 2020, the United States Department of Defense listed CRCC as a Chinese military company under Section 1260H, indicating its association with China’s military-industrial complex. Another Chinese company involved in the construction of North–South Corridor (Kvesheti–Kobi) Road Project is the China Railway Tunnel Group (CRTG) is also blacklisted by the US DOD for its ties to the Chinese military and sanctioned by the World Bank in 2019. Other Chinese companies involved in major infrastructure projects in Georgia include Guizhou Highway Engineering Group Co, China State Construction Engineering Corporation, Hunan Roads and Bridges Construction Group LLC, Sinohydro LLC Corporation and others.

**Surveillance Technologies:** Georgian Dream government widely adopted and put in use Chinese surveillance technologies including surveillance cameras (an estimated 70–80% of Georgia’s state institutions are equipped with them majority of these cameras, operated under state control, are produced by two Chinese companies under international sanctions: Hikvision and Dahua Technology (subjects to Chinese laws, including the 2017 National Intelligence Law, which mandates companies to cooperate with the Chinese government). Out of the 46 procurements made between 2019 and 2024, 26 instances involved cameras procured by Georgian institutions manufactured by Hikvision. Moreover, Tbilisi City Hall uses Chinese-developed software, HikCentral, to manage and support its Hikvision surveillance systems.

Notwithstanding the assertive optimism, this fledgling relationship with China has been predominantly one-sided, with Beijing primarily employing it as a strategic instrument to augment its influence in the region.

## IRAN - EVOLVING RELATIONSHIP

Iran-Georgia relations during 2023-2025 have experienced significant strengthening marking yet another notable shift in Georgian Dream’s foreign policy orientation. The political rapprochement reached symbolic heights when Georgian Dream Prime-Minister Irakli Kobakhidze attended both the funeral of Iranian President Ebrahim Raisi in May 2024 and the inauguration of new President Masoud Pezeshkian in July 2024.

Economically, the relationship has witnessed unprecedented growth, with Georgia’s trade turnover with Iran reaching a record \$322 million in 2024—nearly triple the volume from 2012.

Iranian foreign direct investment has similarly increased substantially, jumping from \$8 million between 2006-2012 to \$41 million in subsequent years, focusing on trade, construction, industry, and transportation sectors. Tourism connections have also strengthened, with 146,000 Iranian visitors arriving in Georgia in 2024, nearly double the 2012 figure. Despite the open and permissive environment, 2025 saw a sharp decline in trade turnover between countries and in the number of visitors from Iran, highlighting the significant impact of geopolitical factors such as the newly imposed sanctions on Tehran, the war with Israel and the regime’s overall region-wide contraction.

As of November 2025, thousands of Iranian companies, with some of them linked to Iran’s armed forces, are operating in Georgia amid sanction evasion concerns. There was a surge in the number of registrations of Iranian companies in Georgia from October 2012 to 2025 going from around 2100 to 12828, increase of 510%, overlapping with the implementation of tough international sanctions on Tehran and Ivanishvili arrival in power. A number of Iranian firms have also participated in public tenders and secured Georgian state contracts.

In 2025, Iran proposed establishing an Iran-Azerbaijan-Georgia transit corridor within the TRACECA framework, with Iranian officials assuming the chairmanship of the TRACECA Intergovernmental Commission. The broader Persian Gulf-Black Sea corridor initiative, represents a key geopolitical project aimed at linking the Indian Ocean and East Asia to Europe with the aim of diversifying Iran’s transport routes. The recent military campaign by Israel and the US, aimed at destroying Iran’s nuclear program capabilities, and the subsequent threats to close the Strait of Hormuz, have demonstrated the importance of Georgia as a vital transport and energy corridor that is not under the control of anti-Western powers.

## CONCLUSION

It is of utmost importance for allies of Georgian people and democracy to correctly identify the disturbing processes underway in Georgia. The rapid consolidation of autocracy, confrontation with Western allies, and rapprochement with Russia and other anti-Western powers should not be misidentified for a policy misstep or a political manoeuvre to claw onto power. The 2024–2025 period made it abundantly clear that Georgia’s rapid descent into authoritarianism and self-imposed confrontation with its Western allies is rather a profound reconfiguration of its domestic and international policies, which will affect its future trajectory and regional geopolitics for many years to come. An isolated Georgia will be compelled to engage in regional formats such as the 3+3, which aims to exclude Western interests from the region and transform it into an area under the exclusive influence of aggressive revisionist powers. This would effectively suppress the last remaining East-West corridor beyond their control. Georgia finds itself on the edge of a precipice in the hands of an authoritarian regime — not only geopolitically, but also existentially—facing a transformation into Russian client state, deeper isolation and in the camp of those fighting against the very international order it has long sought to join.

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