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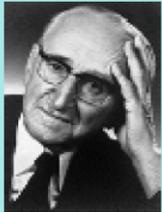
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Ordnungspolitische Diskurse

Discourses in Social Market Economy



Armen Ghazaryan & Anna Kirakosyan

**Armenia as a Digital Bridge Gate:
Innovation and Communication Pathways
with the Global South**

Diskurs 2025 - 11

Armenia as a Digital Bridge Gate: Innovation and Communication Pathways with the Global South

Armen Ghazaryan & Anna Kirakosyan

Abstract

Armenia, strategically positioned at the geopolitical crossroads of East and West, is actively pursuing a transformative agenda to establish itself as a "Digital Bridge Gate." This article examines Armenia's digital infrastructure and burgeoning innovation capabilities, analyzing their potential to foster robust communication and trade pathways with the Global South. Leveraging quantitative metrics from the Network Readiness Index (NRI) 2024, the analysis benchmarks Armenia's performance in ICT development, internet penetration, e-government, and digital trade capacity against key Global South nations and developed economies. The report identifies Armenia's existing digital diplomacy initiatives, such as its cooperation with India on Digital Public Infrastructure and its economic partnership with the UAE. It argues that Armenia's unique blend of advanced human capital in software development and a supportive regulatory environment positions it not merely as a conduit but as a potential "Digital Hub" for South-South digital collaboration. Policy recommendations focus on accelerating infrastructure upgrades, boosting AI research, enhancing digital literacy, and strategically leveraging its digital expertise to deepen ties with the Global South, thereby reinforcing its geopolitical resilience and economic diversification.

Keywords

Digital Gateway-Bridge, Digital Diplomacy, Global South, Digital Infrastructure, Innovation, Digital Diplomacy, Armenia

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Armenia as a Digital Bridge Gate: Innovation and Communication Pathways with the Global South

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1. Introduction: Armenia's Emerging Digital Ambition and Geostrategic Context

Armenia occupies a pivotal geostrategic location in the South Caucasus, a region historically recognized as a vital nexus for trade and communication between Europe and Asia. Situated at the crossroads of East and West, Armenia shares borders with significant Eurasian actors, including Russia and Iran, underscoring its inherent geopolitical importance. In the wake of recent geopolitical shifts, particularly since 2020, Armenia has embarked on a deliberate recalibration of its foreign policy, seeking to diversify its international engagements and reduce its historical dependencies (Iskandaryan, 2024).

Within this evolving landscape, the concept of Armenia as a "Digital Bridge Gate" has emerged as a central tenet of its national strategy. This vision transcends the traditional understanding of a physical transit point, envisioning Armenia as a crucial digital intermediary. By leveraging its growing technological capabilities and unique geographical position, Armenia aims to facilitate digital communication, trade, and innovation flows. This role is particularly pertinent in the context of the burgeoning Global South, a diverse group of nations increasingly seeking diversified partnerships and scalable digital solutions for their own development. Armenia's potential as a digital bridge lies in its capacity to connect the advanced digital economies of the West and East with the rapidly growing needs and markets of the Global South, offering a unique value proposition in the global digital architecture.

This article posits that Armenia, through strategic investments in its foundational digital infrastructure, cultivation of a dynamic and specialized innovation ecosystem, and proactive engagement in digital diplomacy, is uniquely positioned to establish itself as a significant "Digital Bridge Gate" between established digital economies and the rapidly expanding Global South. This strategic positioning is anticipated not only to enhance Armenia's geopolitical standing and economic resilience but also to offer a replicable model for smaller states navigating the complexities of global digital transformations.

2. Digital Infrastructure and Connectivity

Armenia demonstrates strong foundational mobile connectivity, boasting 100% population coverage by at least a 3G mobile network. This widespread basic mobile access is a critical enabler for digital inclusion and the delivery of essential digital services across the country, ensuring that a significant portion of the population can access basic internet services. Furthermore, Armenia's international internet bandwidth, with a score of 67.72, indicates a reasonable capacity for global digital exchange, supporting cross-border data flows and international business operations.

However, while mobile connectivity is pervasive, fixed broadband access, particularly Fiber-to-the-Home (FTTH) subscriptions, stands at 31.03 (Portulans Institute, 2024). This suggests considerable room for expansion in fixed-line internet services, especially in rural and underserved urban areas, where over 75% of Armenian firms currently lack access to high-speed internet. Recognizing this gap, Team Telecom Armenia is actively engaged in modernizing the national network with advanced 4G and 5G equipment and expanding fiber-to-the-home coverage. This ambitious program is supported by significant anchor investments from international financial institutions, including an \$18.5 million commitment from the Asian Development Bank (ADB) and a \$13.5 million contribution from the International Finance Corporation (IFC) through sustainability-linked bonds. These investments are crucial for addressing the estimated \$450-\$600 million needed to close existing digital infrastructure gaps and enhance service quality and reliability (International Finance Corporation, 2025).

3. Innovation Ecosystem and Human Capital

Armenia's innovation ecosystem exhibits notable strengths, particularly in human capital and software development. The country scores highly in mobile apps development (72.4), indicative of a vibrant and skilled developer community capable of producing diverse digital solutions. Its score of 30.9 in GitHub commits further reflects active participation in global open-source development, signaling engagement with international tech trends and collaborative innovation (Portulans Institute, 2024). This is corroborated by an "unexpected increase" in IT experts, with Armenia boasting over 57,000 tech specialists in 2024, proficient in cutting-edge technologies such as artificial intelligence, cybersecurity, and software development. This growing pool of human capital is a significant asset for fostering further innovation and digital transformation (Optimum Partners, n.d.).

While investment in emerging technologies, at 46.25, suggests moderate capital flow, there is substantial potential for attracting further domestic and foreign investment into nascent tech sectors. A critical area for development, however, is advanced research in Artificial Intelligence, as evidenced by a low score of 1.57 in AI scientific publications. Addressing this gap is crucial for Armenia to achieve leadership in future innovation domains (Portulans Institute, 2024).

The growth of Armenia's tech industry is significantly bolstered by robust educational initiatives. Institutions like the TUMO Centre for Creative Technologies, the Foundation for Armenian Science and Technology (FAST)'s Generation AI Program (Antonyan, 2025), and Synopsys's investments in microelectronics education are instrumental in cultivating a new generation of AI researchers and innovators, spanning from school-level to doctoral programs (Optimum Partners, 2024). These initiatives aim to create a sustainable and accessible nationwide AI education framework.

4. Regulatory Environment and E-Governance Initiatives

Armenia's digital landscape is supported by a progressive regulatory environment and commendable e-governance initiatives. The country demonstrates a strong supportive framework with high scores for its ICT regulatory environment (86.31) and e-commerce legislation (75). This indicates a conducive legal and policy landscape that facilitates digital sector growth and digital trade. The score of 69.29 for government online services reflects a notable level of e-governance adoption, which streamlines citizen-government interactions and enhances public service delivery (Portulans Institute, 2024).

In terms of cybersecurity, Armenia's score of 50.5 suggests that while foundational measures are in place, continuous investment and strengthening are required to protect critical digital infrastructure and data, especially given the United States' support for a Cyber Defense Operations Center (U.S. Department of State, 2025).

The observations from Armenia's digital landscape reveal a notable dichotomy. On one hand, the nation exhibits strong capabilities in digital production, evident in its high mobile app development score, active participation in open-source projects, and a rapidly expanding pool of skilled tech professionals. This is further supported by a robust regulatory framework and educational initiatives geared towards cultivating tech talent. On the other hand, indicators related to broader digital adoption and consumption within the domestic economy, such as internet shopping, computer

software spending, and public cloud computing market scale, remain comparatively lower. This suggests the presence of a "two-speed" digital economy: a highly skilled and innovative tech-producing segment coexisting with a broader economy that lags in the widespread adoption and utilization of advanced digital services.

This disparity can be attributed to several factors. The strong human capital and innovation are likely direct outcomes of targeted investments in STEM education and the dynamism of the private sector. However, the slower pace of broader digital adoption might stem from uneven fixed broadband infrastructure rollout, particularly in rural areas, potentially lower digital literacy outside urban centers, or economic barriers hindering technology adoption by small and medium-sized enterprises.

5. The "Crossroads of Peace" Initiative

The "Crossroads of Peace" initiative, launched by Yerevan following the 2020 conflict, represents Armenia's strategic vision to reposition itself as a central Eurasian transit hub.

A critical aspect of the "Crossroads of Peace" is Armenia's unwavering insistence on retaining full sovereign control, including customs and security, over any transit routes passing through its territory. This stance directly contrasts with Azerbaijan's demands for extraterritoriality for the proposed "Zangezur Corridor." This highlights a fundamental link between physical connectivity and digital sovereignty, where control over infrastructure directly impacts national autonomy. The initiative has garnered positive international attention, aligning with the European Union's Global Gateway strategy for fostering sustainable connectivity (European External Action Service, 2024). The United States is also reportedly promoting a connectivity framework that aims to provide a neutral and stabilizing mechanism, potentially involving a U.S.-based operating company, further underscoring the international recognition of Armenia's strategic potential (Shamilzade, 2025).

6. Evolving Foreign Policy and Diversification

Armenia is actively pursuing a significant recalibration of its foreign policy, driven by a desire to reduce its deep-rooted dependence on its traditional ally, Russia, within frameworks such as the Collective Security Treaty Organisation (CSTO) and the Eurasian Economic Union (EAEU). This

strategic shift involves intensifying diplomatic outreach to Türkiye, despite decades of distrust and the absence of formal diplomatic ties.

Concurrently, Armenia is deepening its ties with Western partners. Relations with the United States are being upgraded from an existing bilateral strategic dialogue to a strategic partnership. This includes substantial U.S. investments, approximately \$3.3 billion with \$340 million since 2021, directed towards democratic reforms, economic growth, and defense initiatives, notably the development of a Cyber Defense Operations Center. Similarly, deepening cooperation with the European Union is a key priority, evidenced by a new Partnership Agenda that aims to bolster Armenia's resilience, sovereignty, and sustainable development through enhanced connectivity in transport, energy, and digital domains.

7. Strategic Importance of Digital Pathways

Digital connectivity, encompassing robust data networks and advanced digital infrastructure, is increasingly recognized as a fundamental enabler for economic progress and regional stability. For Armenia, digital pathways offer a crucial means to overcome its landlocked geography and foster new partnerships (Atlantic Council, 2025). The "Crossroads of Peace" is not merely a vision for physical roads and railways; it intrinsically includes the development of digital infrastructure. This comprehensive approach is designed to create new entry points for international firms, particularly from the U.S. and Europe, in sectors such as digital infrastructure and logistics. Digital pathways offer a resilient alternative to traditional geopolitical blockades, enabling the establishment of direct, efficient communication and trade channels with a wider array of global partners.

The pursuit of enhanced digital connectivity and the "Crossroads of Peace" initiative are not merely economic development strategies; they are integral components of a broader foreign policy aimed at diversifying Armenia's international relations and strengthening its strategic autonomy. By becoming a "Digital Bridge Gate," Armenia seeks to reduce its vulnerability to any single external power and to cultivate new interdependencies with a broader, more diverse set of global actors. The emphasis on retaining sovereign control over both digital and physical corridors directly links digital infrastructure to national security and independent statehood. This approach represents a strategic response to historical and ongoing geopolitical pressures, where control over transit has often been a point of contention. Digital pathways, being inherently less susceptible to traditional physical blockades, offer a more resilient and flexible form of connectivity. For

smaller states operating in volatile geopolitical environments, investing in and asserting control over digital infrastructure can thus serve as a powerful instrument of foreign policy, enabling them to project influence, attract diversified investment, and safeguard national sovereignty in an increasingly interconnected and digitally-driven world. The "Digital Bridge Gate" therefore represents a sophisticated strategy for both economic prosperity and geopolitical resilience.

8. Comparative Digital Performance: Benchmarking Armenia's Potential

To fully appreciate Armenia's potential as a "Digital Bridge Gate," a comparative analysis of its digital readiness metrics against a diverse set of countries is essential. This benchmarking provides context for Armenia's strengths and identifies areas requiring further development, positioning its role within the global digital landscape. The analysis utilizes data from the Network Readiness Index (NRI) 2024, comparing Armenia with selected Global South partners (India, UAE, Brazil, South Africa, Indonesia), aspirational developed economies (USA, Germany, Singapore), and a key regional peer (Azerbaijan).

9. Comparative Digital Readiness Metrics

The table below presents a detailed comparison of Armenia's digital readiness across 23 indicators, offering a quantitative foundation for understanding its relative standing (Portulans Institute, 2024).

Table 1: Comparative Digital Readiness Metrics: Armenia vs. Selected Global South and Developed Economies (2024 NRI Scores)

N	Country	Mobile tariffs	Handset prices	FTTH/building Internet subscriptions	Population covered by at least a 3G mobile network	International Internet bandwidth	GitHub commits	Internet domain registra	Mobile apps development	AI scientific publications	Investment in emerging technologies	Computer software spending	Mobile broadband internet traffic within the country	Use of virtual social networks	Annual investment in telecommunication services	Public cloud computing market scale	Government online services	Secure Internet servers	Cybersecurity	Internet shopping	Regulatory quality	ICT regulatory environment	E-commerce legislation	Privacy protection by law content
1	Armenia	61.16	53.84	31.03	100	67.72	30.9	4.65	72.4	1.57	46.25	19.39	5.44	47.38	40.74	7.83	69.29	51.31	50.5	17.42	47.57	86.31	75	67.24
2	India	71.76	69.75	78.92	87.84	96.41	4.77	0.84	71.71	100	64.25	23.94	93.08	25.28	82.9	54.18	77.17	49.16	97.5	8.89	46.84	83.33	75	48.65
3	United Arab Emirates	88.54	100	37.43	100	83.77	13.25	8.82	76.94	5.42	79.5	23.74	27.15	100	61.3	37.64	89.1	58.34	98.08	28.78	72.31	79.76	75	20.5
4	Brazil	71.4	85.04	72.93	39.82	29.21	13.48	5.96	71.16	93.24	39	26.98	41.89	57.21	73.31	54.66	45.98	64.09	96.58	39.66	42.85	94.05	100	80.04
5	South Africa	53.16	59.24	43.4	97.45	77.48	5.05	5.98	61.94	38.57	51.75	36.33	26.54	35.21	65.95	42.94	72.23	76.48	78.5	15.39	43.68	83.69	100	69.47
6	Indonesia	77.1	79.3	66.87	78.36	89.86	4.19	1.39	65.87	100	62.75	37.11	60.38	41.85	72.35	29.46	73.96	60.2	94.92	20.45	52.86	55.95	100	39.51
7	United States of America	82.7	93.55	57.42	95.41	89.68	64.55	65.42	74.16	100	100	100	81.82	60.77	100	100	92.31	94.6	100	86.19	81.46	89.88	100	66.26
8	Germany	85.92	86.83	39.29	99.53	78.74	62.61	70.69	69.63	79.66	86.75	54.88	40.98	71.35	81.65	68.99	76.85	91.67	97.42	68.62	83.75	93.45	100	87.11
9	Singapore	97.86	100	27.83	100	92.95	100	18.23	84.69	6.57	78.5	23.26	12.08	74.72	56.35	46.27	95.8	93.86	98.5	67.2	100	93.45	100	53.41
10	Azerbaijan	66.36	56.28	31.02	100	76.47	4.61	1.28	61.37	3.74	67	5.77	6.07	49.81	41.91	13.81	57.11	45.49	89.23	10.25	45.6	58.93	75	51.05

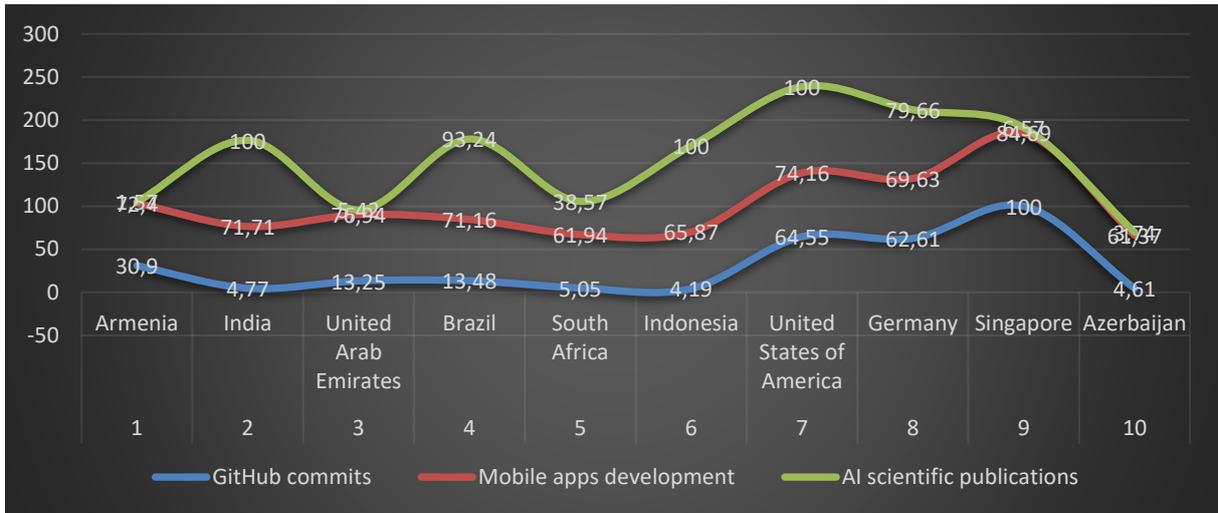
10. Analysis of Strengths and Areas for Improvement

Armenia's digital profile, as illustrated by the NRI data, reveals a unique set of strengths that can be strategically leveraged for its "Digital Bridge Gate" ambition. The country's 100% population coverage by at least a 3G mobile network is a significant foundational asset, surpassing even some developed nations like the USA (95.41%) and Germany (99.53%). This widespread mobile access provides a robust base for digital inclusion. Furthermore, Armenia's high score in mobile apps development (72.4) and a respectable showing in GitHub commits (30.9) indicate a vibrant and skilled developer community, competitive with or even exceeding some Global South counterparts like India (71.71, 4.77) and Indonesia (65.87, 4.19) in specific areas of innovation. The strong ICT regulatory environment (86.31) and e-commerce legislation (75) also provide a stable and supportive framework for digital growth, outperforming regional peer Azerbaijan (58.93, 75) in regulatory quality.

However, the data also highlights critical areas where Armenia lags, particularly in advanced digital adoption and research. Its score in AI scientific publications (1.57) is notably low compared to India (100), Brazil (93.24), and Indonesia (100), indicating a significant gap in cutting-edge research and development in a crucial future technology. Similarly, public cloud computing market scale (7.83), computer software spending (19.39), and internet shopping (17.42) are considerably lower than most benchmarked countries, including Global South nations like India (54.18, 23.94, 8.89) and Indonesia (29.46, 37.11, 20.45). This disparity underscores the observation of a "two-speed" digital economy, where a strong tech-producing sector coexists with a slower pace of broader digital adoption and consumption within the country.

This pattern suggests that Armenia's primary digital advantage lies in its human capital for digital production—specifically in software development, mobile applications, and a supportive regulatory framework—rather than widespread internal digital consumption or enterprise adoption of advanced digital services. The robust educational foundation and targeted tech sector development have successfully cultivated a skilled workforce. The comparatively lower internal adoption and spending can be attributed to factors such as a smaller domestic market, potentially lower purchasing power, or a slower pace of digital transformation among traditional businesses compared to the dynamic IT sector. This positions Armenia not as a massive internal digital market for foreign goods, but rather as an exporter of its digital human capital, software development capabilities, and expertise in digital governance to the Global South. This specialized role could be a significant competitive advantage, allowing Armenia to act as a valuable partner in South-South digital collaboration, particularly in areas like Digital Public Infrastructure (DPI) and custom software development, where its agility and specialized skills can be highly beneficial (see fig. 1).

Fig 1. The Dynamics of Digital Innovation: From Programming to Artificial Intelligence



Source: Portulans Institute, 2024.

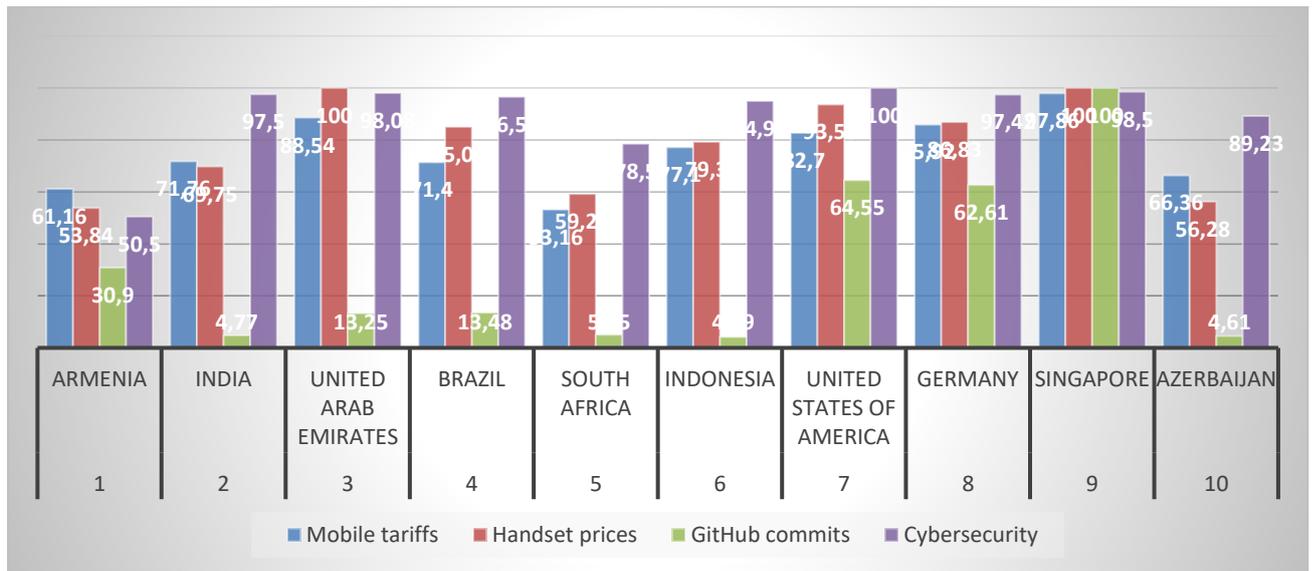
The chart compares three key aspects of digital innovation across countries: GitHub programming activity, mobile app development, and AI-related scientific publications. Armenia demonstrates strong performance in software development and mobile innovation, signaling its emergence as a growing digital hub. While AI research output remains modest, the foundational ecosystem suggests significant future potential.

11. Digital Accessibility and Cybersecurity Across Countries

The chart (fig. 2) presents a comparative overview of digital accessibility and cybersecurity across various countries. The measured indicators include mobile tariffs, handset prices, GitHub programming activity, and cybersecurity level.

Armenia, despite being a small country, demonstrates relatively affordable mobile tariffs and handset prices, along with noticeable developer engagement reflected in GitHub commits. While its cybersecurity index (50.5) is lower compared to leading nations, this highlights significant potential for improvement. Armenia’s digital environment continues to evolve, aiming for technological advancement and a secure digital future

Fig 2. Digital Accessibility and Cybersecurity Across Countries



Source: Portulans Institute, 2024.

Conclusion

Armenia stands at a critical juncture, uniquely positioned at the geopolitical crossroads of East and West. Its deliberate post-2020 pivot towards digital transformation is not merely an economic aspiration but a fundamental strategy for enhancing national sovereignty, overcoming historical geographical isolation, and building robust economic resilience. The analysis has highlighted Armenia's significant strengths in its digital landscape, including widespread mobile network coverage, a burgeoning pool of highly skilled tech talent, and a supportive regulatory environment conducive to digital growth. These internal capabilities are strategically complemented by ambitious initiatives such as the "Crossroads of Peace," which envisions Armenia as a comprehensive Eurasian transit hub, encompassing both physical and digital connectivity.

The successful realization of Armenia's "Digital Bridge Gate" strategy, and its evolution into a "Digital Hub," promises profound benefits that extend far beyond mere economic growth. By fostering deeper digital integration and cooperation with the Global South, Armenia can contribute to greater regional stability, creating new, mutually beneficial interdependencies that transcend traditional geopolitical divides. This strategic digital positioning will significantly reduce Armenia's geopolitical vulnerabilities, allowing it to diversify its partnerships and integrate more deeply into a wide array of global digital networks. Ultimately, Armenia's journey offers a compelling case study and a potentially replicable model for other small, landlocked, or ge-

opolitically constrained nations. Its experience demonstrates how strategic investment in digital infrastructure, cultivation of specialized human capital, and proactive digital diplomacy can fundamentally transform a nation's geopolitical standing and secure its prosperous future in an increasingly interconnected and digitalized world.

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