

Coercive Migration Engineering as a Tool of Hybrid Pressure in the Wider Post-Soviet Security Space: Operation Lockgate and Lessons for Central Asia and the Caucasus

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ABSTRACT

Background: Coercive migration engineering has become an important instrument of hybrid pressure across the wider post-Soviet security space. Objectives: This article analyses the Poland-Belarus border crisis, commonly referred to in Polish security debate as Operation Lockgate, as a case of migration instrumentalisation with implications for regional security, public legitimacy and decision-making resilience. Methods: The study uses a qualitative single-case design combining documentary analysis, qualitative content analysis and functional process tracing. It examines literature on forced migration as coercion, migration diplomacy, Russian active measures, reflexive control, information-psychological operations and cognitive warfare. Results: The analysis identifies four mutually reinforcing lines of effort: political pressure, security and military resource absorption, social and humanitarian polarisation, and information-cognitive amplification. It shows that the strategic value of an engineered migration flow lies not only in physical movement across a border but also in the narratives, timing and decision pressure attached to that movement. Conclusions: Operation Lockgate demonstrates that migration instrumentalisation should be treated as a multidimensional security challenge relevant beyond the EU-Belarus border. Border resilience depends on lawful control, humanitarian credibility, interagency coordination, evidence-based communication and regional learning.

Keywords: cognitive warfare, coercive migration engineering, hybrid threats, migration diplomacy, regional security

INTRODUCTION

The security of contemporary political communities cannot be reduced to military readiness or territorial defence. In periods of prolonged confrontation, a state's security also depends on its ability to maintain legitimate decision making, public trust and social cohesion under pressure. Border crises are particularly important in this respect because they combine sovereignty claims, humanitarian vulnerability, media visibility and alliance politics. A state may successfully protect its territory and still suffer strategic effects if a border crisis erodes trust, polarises society or forces decision makers to act within cognitive conditions shaped by an adversary.

This article examines coercive migration engineering as one such mechanism. Coercive migration engineering is understood here as the deliberate initiation, facilitation, manipulation or exploitation of population movement in order to impose political, institutional, social or informational costs on a target state. This definition links the literature on forced displacement as coercion with research on migration diplomacy, active measures and cognitive warfare (Adamson & Tsourapas, 2019; Greenhill, 2010; Wojnowski, 2022). The mechanism is not reducible to ordinary migration management. Its strategic significance lies in the deliberate connection between human mobility, state capacity, public emotions and political decision making.

The empirical focus is the crisis on the Poland-Belarus border, commonly described in Polish security debate as Operacja Śluza or Operation Lockgate. The case is important because it shows how migration can be used below the threshold of armed conflict while producing

effects that extend beyond border administration. The movement of migrants created a real humanitarian and security problem. At the same time, the problem was amplified by narratives designed to accuse Poland, the Baltic states, the European Union and NATO of hypocrisy or brutality while shifting attention away from the state-facilitated character of the pressure.

The case is also relevant for the thematic profile of Central Asia and the Caucasus because it concerns the broader security dynamics of the post-Soviet and Eurasian space. Central Asia and the South Caucasus are not identical to the EU-Belarus border, but they share several analytical vulnerabilities: exposure to cross-border pressure, the strategic use of transport and migration corridors, dependence on regional narratives, and the continuing influence of Russian security thinking. For this reason, Operation Lockgate can be used as a mechanism-generating case rather than as a geographically isolated episode. It helps identify indicators that may be relevant for other borderlands and transit regions where migration, infrastructure, information operations and regional security overlap.

The main research question is: how did the Russia-Belarus axis use coercive migration engineering during Operation Lockgate to shape the political, security, social and informational environment of Poland and NATO's eastern flank, and what lessons does this mechanism offer for the study of regional security in Central Asia and the Caucasus? Four subsidiary questions guide the analysis: first, how can migration be transformed into a tool of state influence; second, how does Russian strategic thought frame migration and information-psychological operations as indirect means; third, why can Operation Lockgate be interpreted as part of a broader strategic sequence; and fourth, how did the operation produce reflexive and cognitive effects?

The article advances the following argument. Operation Lockgate should not be treated only as a humanitarian, administrative or border crisis. It should be interpreted as a mechanism of hybrid pressure in which physical pressure at the border was synchronised with information-psychological activity. The aim was not necessarily to achieve one immediate concession. It was to impose costs, test reactions, produce polarisation and shape the cognitive environment in which political and security decisions were made.

The contribution of the article is threefold. First, it connects the literature on weaponised migration and migration diplomacy with research on reflexive control and cognitive warfare. Second, it reformulates a Polish security-oriented case into a comparative regional-security framework relevant for Eurasian borderlands. Third, it proposes a conceptual model explaining how an engineered migration flow can become a hybrid and cognitive pressure mechanism affecting state capacity, social cohesion and public legitimacy.

METHODS

The study uses a qualitative single-case design. Operation Lockgate was selected because it is a strategically significant case of migration instrumentalisation on NATO's eastern flank and because it combines political, military, social and informational dimensions. The purpose is not to quantify all effects of the crisis but to reconstruct the mechanism through which migration pressure was transformed into a multidimensional security challenge.

The research design combines three methods. First, documentary analysis is used to examine scholarly literature, expert reports and strategic or publicistic sources concerning migration, security and indirect methods of state influence. Second, qualitative content analysis is used to identify how migration is framed as an instrument of pressure, how humanitarian narratives are linked to accusations against target states and how the crisis is connected to broader geopolitical claims. Third, functional process tracing is used to assess whether the sequence of actions and effects is consistent with the logic of coercive migration engineering.

The source base consists of four categories: literature on forced displacement as coercion and migration diplomacy; Polish and international analyses of Russian coercive migration engineering, active measures and information operations; Russian-language texts that conceptualise population flows or information-psychological operations as instruments of

influence; and NATO-related and scholarly material on cognitive warfare and reflexive control. The analysis does not rely on classified intelligence and therefore does not claim to prove the existence of a single disclosed Russian operational plan. The argument is functional: it assesses the compatibility of observed mechanisms, stated strategic concepts and documented effects with known methods of indirect pressure.

The analytical framework is organised around four lines of effort. The political line concerns attempts to influence state and EU-level decisions, alliance cohesion and public legitimacy. The security or military line concerns the absorption of border-guard, police and military resources as well as testing the target state's ability to operate below the threshold of war. The social and humanitarian line concerns polarisation around the moral status of border defence, asylum procedures and the treatment of migrants. The informational and cognitive line concerns narrative amplification, perception shaping, trust erosion and pressure on decision makers.

The coding logic distinguishes seven indicators: engineered or facilitated mobility; state facilitation; coercive targeting; institutional burden; narrative amplification; decision-pressure effects; and resilience outcomes. This structure allows the article to move beyond broad claims about hybrid warfare and to specify how the operation worked as a sequence of linked mechanisms. The limitations of the study are addressed in the discussion. In particular, the article does not provide a quantitative measure of public opinion or institutional costs, and it treats Operation Lockgate as a mechanism-generating case rather than a complete comparative study.

RESULTS

CONCEPTUAL FINDINGS FROM THE LITERATURE

The literature relevant to the case can be grouped into four strands: coercive uses of migration, Russian non-military and information-psychological operations, cognitive warfare and reflexive control, and resilience-oriented security governance. These strands are usually discussed separately. The analytical value of Operation Lockgate lies in showing how they intersect.

The first strand concerns forced displacement and migration as instruments of coercion. Greenhill's work on weapons of mass migration showed that population movements can be used as a non-military instrument of state influence and bargaining (Greenhill, 2010). Adamson and Tsourapas developed the broader concept of migration diplomacy, showing how cross-border mobility can become part of states' diplomatic strategies and issue-linkage practices (Adamson & Tsourapas, 2019). These approaches make it possible to understand migration not only as a humanitarian or socioeconomic phenomenon but also as a strategic resource. In the case of Operation Lockgate, this perspective is essential because the pressure was generated at the intersection of humanitarian vulnerability and interstate competition.

The second strand concerns Russian approaches to indirect influence. Wojnowski argues that Russian coercive migration engineering has been used as a form of pressure on NATO's eastern flank and should be studied as part of Russian operational practice rather than as a purely speculative concept (Wojnowski, 2022). His broader work on Russian imperial tools situates active measures as activities designed to influence political, social and economic life in other states in peacetime and wartime (Wojnowski, 2023). Depczynski and Elak similarly emphasise that information operations in Russian operational art are not merely an auxiliary element of military action but an instrument of strategic rivalry (Depczynski & Elak, 2020).

Russian-language strategic and publicistic sources reinforce this reading. Manoilo, Petrienko and Frolov frame the information-psychological domain as a field in which perception, social emotions and readiness for decisions may be shaped (Manoilo et al., 2012). Vladimirov's writings on anthropoflows describe population flows as a strategic instrument capable of influencing social consciousness and the stability of state structures (Vladimirov, n.d.-a, n.d.-b). Tonkonogov and Malyuk similarly treat migration wars as tools of contemporary geopolitics

(Tonkonogov & Malyuk, 2016). These sources should not be read as transparent descriptions of a single plan. Their analytical value is that they demonstrate a strategic vocabulary in which migration can be imagined as a means of pressure rather than as a neutral social process.

The third strand concerns reflexive control and cognitive warfare. Reflexive control refers to the transmission of specially prepared information or premises to an adversary so that the adversary makes a decision favourable to the actor applying the influence (Smolyan, 2013; Thomas, 2002, 2004). Ionov's typology, discussed by Wojnowski, includes pressure, false information about the situation, influence on decision algorithms and manipulation of decision timing (Wojnowski, 2015). Cognitive warfare is broader. NATO and related literature describe it as an effort to influence attitudes, perceptions, emotions and behaviour by targeting cognition at individual and group levels (Briggs & Tusor, 2025; du Cluzel, 2020; NATO Allied Command Transformation, 2023). In this article, reflexive control is treated as a decision-oriented mechanism, while cognitive warfare is treated as a wider condition-shaping process.

The fourth strand concerns resilience. Resilience literature emphasises the capacity of systems or communities to absorb disturbance, adapt and continue functioning (Folke, 2006; Norris et al., 2008). Institutional resilience in transboundary crisis management requires more than planning for predictable emergencies; it requires governance arrangements capable of learning, coordinating and maintaining legitimacy under uncertainty (Boin & Lodge, 2016). A border state exposed to engineered migration pressure needs robust legal procedures, redundant operational capacity, rapid coordination, credible communication and public trust. Without these resources, a temporary border crisis can generate long-term social and political effects.

CASE BACKGROUND: OPERATION LOCKGATE AND THE POLAND-BELARUS BORDER CRISIS

Operation Lockgate refers here to the deliberate generation and exploitation of migration pressure on the external border of the European Union and NATO, especially along the Poland-Belarus border. The term is used in Polish debate to describe the Belarusian-facilitated movement of migrants toward the border and the accompanying political and informational campaign. The case unfolded in a regional context marked by Belarus's deepening dependence on Russia, Russian-Belarusian military exercises, escalating tensions with the West and the subsequent full-scale Russian aggression against Ukraine.

From a humanitarian perspective, the crisis involved vulnerable people who were placed in a dangerous border environment. From a state-security perspective, however, the movement was not a spontaneous migration route in the ordinary sense. The value of the case for security research lies in the combination of migrant vulnerability, state facilitation and geopolitical pressure. The target state was placed in a dilemma: every response could be reframed either as weakness in border protection or as inhumanity toward migrants.

The case should therefore not be reduced to a border, administrative or humanitarian problem. Its trajectory suggests that migration pressure can create political, social, informational and military effects without the direct use of armed force. The Polish state had to mobilise border services, police and military support; the public debate became polarised between humanitarian and security narratives; and Russian-Belarusian communication gained material for accusing Poland, the Baltic states and the EU of double standards.

The chronological context is significant. Szachon-Pszenny and Zaręba link the instrumentalisation of migrants with a broader destabilisation of the EU's eastern external border in the context of the war in Ukraine (Szachon-Pszenny & Zaręba, 2024). This does not mean that the border crisis mechanically caused later military events. Rather, it indicates that the crisis can be interpreted as part of a broader sequence of pressure against NATO's eastern flank, in which political, military, social and informational actions mutually reinforced one another.

The case also resembles earlier examples of migration pressure used for political bargaining. Wojnowski discusses, among other cases, the Finnish-Russian migration crisis of 2015-2016, in which the opening and subsequent closure of an Arctic migration route suggested the possibility of controlling migration pressure as an instrument of negotiation (Wojnowski, 2022). This precedent is important because it shows a repeated logic: the flow is generated or facilitated, then becomes a bargaining and perception-shaping instrument directed at the target state.

MAIN LINES OF EFFORT

Coercive migration engineering works because it connects a physical event with political, institutional, social and informational consequences. The movement of people is the visible trigger, but its strategic value depends on how the event is timed, administered, narrated and linked to the vulnerabilities of the target state. The analysis identifies four mutually reinforcing lines of effort.

In the political line of effort, migration pressure creates a dilemma for democratic states. A restrictive response can be portrayed as violating humanitarian norms; a permissive response can be portrayed domestically as loss of border control. The adversary benefits from the target state's exposure to both types of criticism. This is consistent with Greenhill's insight that democracies may be vulnerable to coercive migration because humanitarian commitments and domestic political constraints can be exploited (Greenhill, 2010).

In the security and military line of effort, border pressure absorbs resources. The engagement of border guards, police and military units does not necessarily prevent the state from responding elsewhere, but it does impose operational, financial and cognitive costs. A cautious formulation is therefore required. It is more accurate to state that the crisis reduced flexibility, consumed attention and forced a costly concentration of resources on the border, rather than to claim that Poland was deprived of the ability to react militarily to Russia's war against Ukraine.

In the social and humanitarian line of effort, the state is exposed to polarisation. Migrants are both vulnerable individuals and instruments in a coercive design. Democratic debate tends to split around this dual status. One side emphasises the protection of life and human dignity, while the other emphasises sovereignty, public order and border security. A hostile information campaign can intensify this division by selecting images, amplifying emotional language and framing every institutional decision as morally illegitimate.

In the informational and cognitive line of effort, the crisis becomes a narrative platform. The strategic effect does not depend only on what happens at the border, but on how events are made visible and interpretable. Images of suffering, accusations of brutality, claims about Western hypocrisy and narratives about the alleged collapse of liberal values can transform an operational border incident into a cognitive pressure campaign. This mechanism is central to the shift from classic hybrid action to cognitive effects.

COGNITIVE AND REFLEXIVE EFFECTS

Operation Lockgate has both reflexive and cognitive dimensions, but they refer to different analytical levels. Reflexive control concerns the decision-making process of the adversary. Cognitive warfare concerns the broader shaping of perceptions, emotions, social trust and interpretative frames.

From a reflexive-control perspective, migration pressure can be used to shape the decision environment. The target state receives a situation that appears urgent, morally ambiguous and politically costly. The initiator of pressure may not need to dictate one exact decision. It can instead restrict the target's perceived options, accelerate decision timing and make each available response costly. Ionov's categories are useful here: force pressure, false or distorted information about the situation, influence on decision algorithms and manipulation of decision timing (Wojnowski, 2015).

From a cognitive-warfare perspective, the goal is wider than a single decision. The aim is to influence how citizens, media, political elites and international audiences understand the crisis. The border becomes a symbolic scene. If the target state is framed as brutal, hypocritical or incompetent, the adversary can erode trust in institutions and alliances. If the state is framed domestically as unable to protect the border, the adversary can strengthen fear and demand for radical measures. Both effects are valuable because they reduce the stability of the target's cognitive environment.

The relationship between the three concepts can be summarised as follows. Coercive migration engineering provides the material trigger. Reflexive control attempts to shape the decision logic of political and security elites. Cognitive warfare broadens the effect to society by influencing perception, emotion, identity and trust. Institutional and societal resilience determine whether the target state can absorb the pressure without losing legitimacy or coherence.

This distinction is important for publication quality. It prevents the article from treating cognitive warfare as a catch-all label. Instead, the article can show how a border event becomes cognitively significant: the engineered flow creates a crisis; the crisis imposes institutional burden; narratives define the meaning of the burden; and the target society and decision makers respond within an information environment partly shaped by the adversary.

DISCUSSION

IMPLICATIONS FOR REGIONAL SECURITY STUDIES

The analysis has implications for regional security beyond the immediate Poland-Belarus border. It suggests that migration instrumentalisation should be studied not only as a European border problem but also as a type of coercive practice that can be applied wherever borderlands, transport routes, labour mobility, information operations and regional rivalries overlap. Central Asia and the Caucasus provide important comparative contexts because both regions are shaped by cross-border mobility, external influence, contested narratives and the legacy of Soviet and post-Soviet security governance.

The most important analytical lesson is that migration becomes strategically consequential when it is connected to institutional strain, public emotion, narratives and trust. In regions where labour mobility, border management and diaspora politics are already sensitive, a sudden change in movement patterns can become a political instrument even when the migrants themselves are not adversarial actors. This distinction is essential: the object of analysis is the actor instrumentalising movement, not the people being moved.

The case also suggests that small or medium-sized states located near larger power centres should treat engineered mobility as a possible early-warning indicator. Sudden opening of routes, organised transport patterns, synchronised narratives, involvement of state-linked actors and unusual timing with military or political developments should not be viewed separately. They may be part of a sequence designed to test institutions, influence public debate and create bargaining pressure.

For Central Asia and the Caucasus, the concept is particularly relevant in relation to corridors, borders and information ecosystems. The same mechanism can be adapted to different settings: it may involve labour migrants, asylum seekers, internally displaced people, transport bottlenecks or humanitarian crises. What matters analytically is not the identity of the migrants but the strategic conversion of movement into pressure. This is why the Operation Lockgate case can contribute to broader research on Eurasian regional security even though the immediate empirical site is the EU-Belarus border.

INSTITUTIONAL AND COMMUNICATION LESSONS

First, the case shows that resilience must be understood as an interagency capacity. Border guards, police, armed forces, local authorities, social services, courts, ministries, humanitarian organisations and strategic communication units all become involved. If these actors operate

without coordination, the state may appear inconsistent or reactive. Institutional resilience therefore requires pre-agreed decision procedures, legal clarity and channels for rapid coordination.

Second, communication is an operational resource. In engineered migration crises, silence or inconsistency creates space for hostile narratives. However, communication must avoid dehumanising migrants because this would strengthen the adversary's framing and undermine the target state's legitimacy. A resilient response must communicate two messages simultaneously: the state protects the border and the law; the state also recognises migrant vulnerability and acts within humanitarian standards.

Third, the case shows that resilience depends on trust. Hostile information campaigns seek to make every institutional action appear either cruel or incompetent. If citizens distrust official information, they become more vulnerable to emotional amplification and conspiracy narratives. Trust is therefore not a soft variable. It is part of the security infrastructure of a democratic state.

Fourth, resilience requires alliance-level and regional learning. Operation Lockgate was directed not only at Poland but at the EU and NATO eastern flank. A purely national response is insufficient when the narrative target is the credibility of the West as a whole. The same logic applies to regional organisations and neighbouring states in Central Asia and the Caucasus. Shared attribution procedures, rapid exchange of evidence, common humanitarian standards and coordinated strategic communication would reduce the effectiveness of future operations.

The policy implications can be grouped into five recommendations. States exposed to coercive migration engineering should maintain a public evidence archive documenting facilitation patterns; build an interagency crisis cell combining border protection, intelligence, legal and humanitarian expertise; develop strategic communication that explains the dual nature of the crisis; protect humanitarian standards as a source of legitimacy rather than as an obstacle to security; and integrate migration-pressure scenarios into regional resilience planning.

LIMITATIONS AND FUTURE RESEARCH

The study has three principal limitations. First, it does not rely on classified intelligence and therefore cannot demonstrate the complete planning chain behind the crisis. Its contribution is a functional reconstruction of mechanisms. Second, it does not provide a quantitative measure of public opinion, resource expenditure or institutional costs. Third, it does not conduct a full comparative study of Central Asia, the Caucasus and the EU-Belarus border.

These limitations create clear directions for future research. Scholars could develop a chronological dataset of border incidents, map official and hostile communication narratives, compare Poland's case with Finland's 2015-2016 experience, and examine public-opinion data on trust, threat perception and humanitarian attitudes. Comparative work could also examine how migration and mobility pressures interact with regional security dynamics in Central Asia and the Caucasus. Such work would strengthen the article's empirical base and make the mechanism more replicable.

A further line of research should examine the relationship between migration diplomacy and coercive migration engineering. Not every use of migration in foreign policy is coercive or unlawful. States routinely negotiate labour access, readmission, visas and border cooperation. The analytical task is to identify when ordinary migration governance becomes coercive pressure. Indicators include deliberate facilitation of irregular movement, targeting of a specific state, synchronisation with hostile narratives and exploitation of humanitarian vulnerability for political leverage.

CONCLUSION

This article has interpreted Operation Lockgate as a case of coercive migration engineering directed against the political, security, social and informational environment of a border state.

The argument does not require proof of one disclosed operational plan. It rests on a functional reconstruction of mechanisms: migration pressure was generated or facilitated; the pressure imposed administrative and security costs; narratives amplified the humanitarian and political meaning of the crisis; and the resulting situation shaped public emotions, institutional trust and decision-making conditions.

The central conclusion is that migration instrumentalisation should be treated as a multidimensional regional-security challenge. In the Polish-Belarusian case, the crisis operated through political, security, social and informational lines of effort. Its strategic value did not lie only in the presence of migrants at the border. It lay in the conversion of that presence into a dilemma for democratic governance: how to protect the border without losing legitimacy, how to defend humanitarian standards without enabling coercion, and how to communicate under hostile narrative pressure.

The distinction between coercive migration engineering, reflexive control and cognitive warfare is essential. Coercive migration engineering supplies the operational trigger. Reflexive control describes the effort to shape the adversary's decision logic. Cognitive warfare describes the wider battle over perception, emotion and trust. Resilience is the condition that determines whether these pressures produce lasting destabilisation or are absorbed through adaptive governance.

For policy makers, the key lesson is clear: coercive migration engineering should be included in threat forecasting and resilience planning. The state must be prepared not only to secure a border, but also to protect the social and institutional conditions under which that border is governed. A sustainable and resilient response must combine lawful control, humanitarian credibility, interagency coordination, evidence-based communication and regional solidarity. For scholars of Central Asia and the Caucasus, the case offers a transferable mechanism for studying how mobility, information and regional power politics can be fused into instruments of hybrid pressure.

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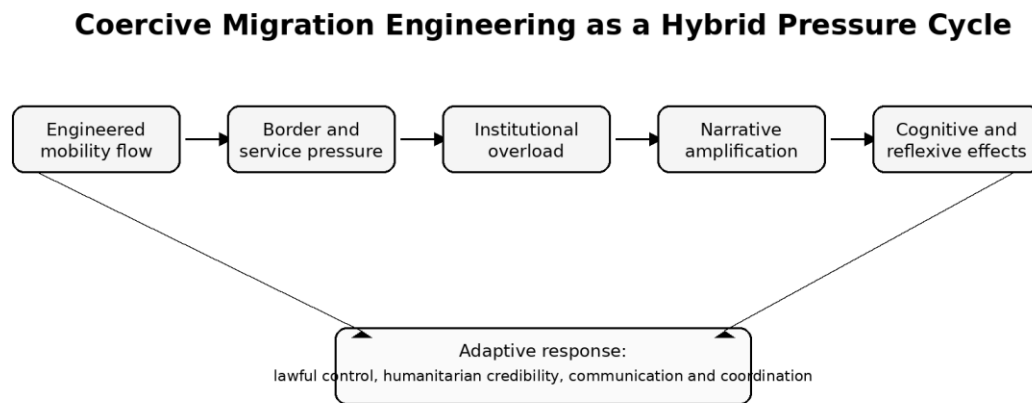
TABLES AND FIGURES

Table 1: Analytical reconstruction of the main lines of effort in Operation Lockgate.

Line of effort	Operational mechanism	Cognitive/reflexive effect	Security implication
Political	Pressure on national and EU decision makers; creation of policy dilemmas.	Forces leaders to choose under external time pressure and public scrutiny.	Tests legitimacy and coherence of crisis governance.
Security / military	Absorption of border-guard, police and military support capacity.	Creates a sense of permanent emergency and uncertainty about escalation.	Reduces flexibility and increases costs of maintaining readiness.
Social / humanitarian	Use of vulnerable migrants to produce moral conflict within the target society.	Polarises public debate between humanitarian and security narratives.	Weakens social cohesion and trust if communication is inconsistent.
Informational / cognitive	Narrative amplification, selective images, accusations of hypocrisy and brutality.	Shapes perception, emotions and assumptions used by citizens and decision makers.	Targets trust, credibility and adaptive decision-making capacity.

Table 2: Conceptual distinction between coercive migration engineering, reflexive control, cognitive warfare and resilience.

Concept	Primary object	Main mechanism	Role in the case
Coercive migration engineering	Mobility and border pressure	Deliberate facilitation or exploitation of population movement	Creates the physical and administrative crisis.
Reflexive control	Decision-making elites	Prepared premises, timing pressure and distorted situational awareness	Shapes how leaders evaluate options and costs.
Cognitive warfare	Citizens, groups, elites and audiences	Influence on perception, emotion, meaning and trust	Turns the border crisis into a contest over interpretation.
Societal and institutional resilience	State capacity and social cohesion	Absorption, adaptation, coordination and legitimacy under stress	Determines whether pressure produces lasting destabilisation.



The same physical event becomes strategically consequential when it is linked to institutional strain, public emotion, narratives and trust.

Figure 1: Coercive migration engineering as a hybrid pressure cycle. Source: authors' conceptualisation.