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COERCION THROUGH THREAT AND USE OF FORCE IN HYBRID AND CONVENTIONAL WARFARE: THE SOUTH CAUCASUS AS A CASE STUDY IN THE 2008 RUSSO-GEORGIAN WAR AND THE 2020 SECOND KARABAKH WAR

INTRODUCTION

Hybrid warfare conceptualizes the evolution of modern conflicts, incorporating key assumptions from fourth- and fifth-generation warfare. These forms of warfare emphasize the use of economic, political, and social factors to undermine opposing leadership, rather than relying solely on military force. In such conflicts, military superiority alone is insufficient; a deep understanding of local culture, history, and societal dynamics becomes essential. By integrating cultural, social, legal, psychological, and moral dimensions into warfare, hybrid strategies reduce the necessity for large-scale military engagement, making the broader use of armed forces less relevant (Iskandarov, Gawliczek, 2020b). Hybrid warfare, as a modern form of conflict, integrates conventional military operations with unconventional tactics such as cyberattacks, disinformation, economic pressure, proxy forces, and irregular warfare. In contrast, conventional strategy follows traditional military doctrine, emphasizing decisive engagements between regular armed forces, clear frontlines, organized battle formations, and direct military confrontation. Analyzing conflicts over the past two decades demonstrates that both strategies remain relevant and are inherently interconnected, often complementing each other in contemporary warfare.

Coercion through threats or the use of force is a fundamental component of both hybrid warfare and conventional strategy. Understanding the theoretical foundations of coercion can help predict which strategies are likely to succeed or fail in future geopolitical crises. Coercion involves leveraging threats or force to compel a target nation to act in a specific manner or to restrict its freedom of action (Iskandarov, Gawliczek,

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2020b). Most theories of coercion focus primarily, if not exclusively, on the threat of military force, often overlooking other forms of power or their combination with military strength. This concept has been extensively analyzed in various scholarly articles. Thomas Schelling defined “violence” strictly in military terms and drew a qualitative distinction between coercion – “making someone give you what you want” – and brute force, which involves “forcibly taking it.” Charles Tilly (2003) also defines violence as the use of physical force to cause injury or damage to persons or objects. Hannah Arendt (1970) distinguishes between power and violence by characterizing violence as instrumental – that is, a means to an end – often emerging as destructive when power is absent. She thus frames violence as a tool of political struggle, but not as synonymous with power itself. Alexander George (1992; 1994) conceptualizes coercive diplomacy as a strategy that combines military threats with flexibility, credibility, and sustained diplomatic engagement. Raymond Tanter and John Psarouthakis (1999) define coercive diplomacy as the strategic combination of credible military power and diplomatic commitments in the process of coercion. While political hawks emphasize the use of credible threats to compel compliance, doves advocate for persuasion and reassurance to achieve the same goal. An effective and balanced policy integrates both approaches—applying threats when necessary to reinforce deterrence while offering reassurances when appropriate to facilitate compliance and de-escalation. Byman and Waxman (2002) examine the complexities and limitations of coercion in U.S. foreign policy, focusing on the interplay between military force, diplomatic pressure, and strategic signalling. Robert Art and Patrick Cronin (2003) analyze the effectiveness of coercive diplomacy in U.S. foreign policy through a series of case studies, including U.S. confrontations with Iraq, North Korea, Serbia, and China. They examine how factors such as credibility, military capability, and strategic signalling influence the success or failure of coercive diplomatic efforts. Schelling (2008) argues that coercion relies on the threat of punishment rather than brute force to shape an adversary’s decisions. Levy, Jack S. (2008) examines Alexander George’s theoretical frameworks, particularly the concept of “coercive diplomacy,” which involves the use of threats and limited force to persuade an adversary to comply with a demand. Todd S. Sechser (2010) explores the paradox of coercive threats in asymmetric power dynamics, arguing that stronger states often struggle to compel weaker adversaries despite their overwhelming military superiority. The study challenges conventional assumptions that power asymmetry naturally translates into coercive success, emphasizing instead that credibility and commitment problems frequently undermine the effectiveness of threats. Peter Viggo Jakobsen (2011) critically examines the limitations of existing military coercion theories by analyzing their applicability in modern conflicts. The study argues that while traditional coercion theory emphasizes the role of threats, signalling, and military action in compelling adversaries to comply, real-world cases often reveal significant challenges in execution. Douglas Cantwell (2017) delves into how hybrid warfare tactics, which blend conventional and unconventional methods, serve as tools of aggression and coercion, challenging traditional international law frameworks. Jack Brown (2018) examines the evolution of hybrid warfare, its implications on global security, and the legal challenges it presents, particularly concerning the use of coercive force. Sean Monaghan (2020) discusses strategies for countering hybrid threats, em-

phasizing the importance of understanding coercion in the context of modern warfare. Julie Celine Bergaust and Stig Rune Sellevåg (2023) explores how hybrid threats employ coercive diplomacy and strategies that fall below the threshold of armed conflict, complicating traditional defense mechanisms.

The literature review indicates that South Caucasus region has been largely overlooked in studies examining the use of threats or force as a tool of coercion. For instance, Khayal Iskandarov and Piotr Gawliczek (2022) focus on the economic component of the hybrid warfare in the South Caucasus. The authors highlight the vulnerabilities of particular nations in the region to economic coercion and make suggestions for improving them, underscore the regional unity in the South Caucasus as a prerequisite for eliminating or at least mitigating economic dependence and healing the “regional fracture” that has lasted for decades. Iskandarov et al. (2024) examine the violation of territorial integrity as a stage of hybrid warfare, since the preservation of territorial integrity has become a critical pillar of national security policy since the outbreak of the Russia-Ukraine war.

The paper employs comparative analysis, synthesis, and case study analysis to examine coercion through the threat and use of force in hybrid warfare and conventional strategy. It primarily focuses on two case studies: the 2008 Russo-Georgia War and the 2020 Second Karabakh War between Armenia and Azerbaijan, analyzing their strategic, geopolitical, and military dimensions. The paper integrates realism and coercion theory to provide a more nuanced analysis, while employing expected utility theory as a tool to evaluate decision-making.

The research focuses on the following key questions:

1. How do state actors employ coercion to achieve their strategic objectives?
2. What insights do historical and contemporary cases provide about the effectiveness of coercion through force or its threat in conflicts?

FROM COERCIVE DIPLOMACY TO COERCION THROUGH USE OF FORCES

Coercion through the use of threats or force is a strategic tool employed by states to influence the behavior of adversaries or allies, aiming to achieve political, military, or economic objectives without necessarily resorting to full-scale conflict. US President Dwight D. Eisenhower used economic coercion against Britain and France during the 1956 Suez Crisis, pressuring them to withdraw by threatening financial repercussions. Similarly, Adolf Hitler employed coercive diplomacy against his adversaries, Britain and France, first in 1936 by reoccupying the Rhineland and later during the Munich Crisis of 1938, forcing concessions without direct military confrontation. During the 1962 Cuban Missile Crisis, the Kennedy administration used diplomatic threats to pressure the Soviet Union into withdrawing its missiles from Cuba. The 2011 Libya War exemplifies the interplay between coercive diplomacy and the use of force as a tool of coercion. The conflict, which led to the overthrow of Muammar Gaddafi, involved diplomatic pressure, economic sanctions, and ultimately military intervention by NATO forces. The failure of initial diplomatic efforts and the escalation to military

action highlight the limitations of coercive diplomacy when the targeted regime resists external pressure. Russia-Ukraine war is a clear example of coercion through threats and the use of force. Russia has employed a mix of conventional military force, cyberattacks, economic pressure, disinformation campaigns, and even nuclear threats to influence Ukraine. The exercise of coercion requires a degree of diplomatic, informational, military, or economic leverage. For Eisenhower, this leverage was primarily economic; for Hitler and Kennedy, it was a combination of diplomatic and military pressure. In contrast, Putin has relied predominantly on the use of force to attempt to alter Ukraine's geopolitical orientation (Renz, Smith, 2016: 27). Researchers sometimes conflate coercion through threats with coercion through the use of force, as both involve exerting pressure to shape an adversary's behavior. However, coercion through the threat can be considered coercive diplomacy, which is fundamentally different from coercion through the use of force. Coercive diplomacy is a subset of coercion, relying primarily on threats rather than direct military action. While coercive diplomacy employs threats, sanctions, or ultimatums to achieve objectives without full-scale war, coercion through the use of force includes actual application of military power, such as invasions or bombings. Referring back to the examples mentioned earlier, the Cuban Missile Crisis (1962) is a classic case of coercive diplomacy, whereas Russia's attack on Ukraine (2022) exemplifies coercion through force. The Libya War (2011) demonstrates the dynamic relationship between coercive diplomacy and military intervention.

Coercive diplomacy is, at its core, a diplomatic tool that offers political leaders an alternative to war. While it does involve the use of force, it is intended for psychological impact rather than outright destruction. Unlike a full-scale military strategy aimed at eliminating the enemy's ability to resist, coercive diplomacy relies on controlled, limited, and carefully measured use of force to pressure an adversary without escalating into total war. The term offensive diplomacy is often misconstrued and mistakenly equated with coercive diplomacy, which is a significant misconception. Offensive diplomacy is a broader and more proactive strategy aimed at aggressively advancing a state's interests. While it may include coercive diplomacy, it also encompasses assertive negotiations, strategic alliances, economic pressure, and even military interventions to reshape the geopolitical landscape in favor of the state's objectives. In contrast, coercive diplomacy is primarily defensive, seeking to compel an adversary to comply with demands while avoiding full-scale conflict. Offensive diplomacy, on the other hand, is expansionist, aiming to gain advantages or reshape power dynamics. For example, the U.S. demand – backed by military threats – for Iraq to withdraw from Kuwait in 1990 exemplifies coercive diplomacy. In contrast, NATO's airstrikes against Serbia in 1999 to compel its withdrawal from Kosovo represent coercion through the use of force. Meanwhile, Russia's annexation of Crimea, achieved through a combination of political, economic, and military maneuvers, serves as an example of offensive diplomacy. While these terms are interrelated, they are not identical. This paper specifically focuses on coercion through threats and the use of force, excluding offensive diplomacy as a subject of research.

In the context of coercive diplomacy (and coercion through the use of force), force is regarded as a “flexible and refined psychological instrument of policy.” The “exem-

plary use of limited force” must be carefully calibrated to demonstrate resolve in protecting national interests and to establish the credibility of one’s willingness to escalate if necessary. Coercive diplomacy proved highly effective during the 1962 Cuban Missile Crisis, compelling the Soviet Union to dismantle its offensive weapons in Cuba. However, its success was more limited during the 2013 chemical weapons crisis in Syria. Although Syria agreed to join the Chemical Weapons Convention and dismantle its declared chemical weapons stockpile, reports (sams-usa.net, 2016) indicate that chemical attacks continued in subsequent years. Similarly, the need to launch Operation Desert Storm in 1991 could be seen as a failure of coercive diplomacy, as months of military and diplomatic pressure failed to compel Saddam Hussein to withdraw from Kuwait. Likewise, coercive diplomacy has not been effectively applied on the Korean Peninsula, where persistent threats and negotiations have yet to achieve denuclearization or long-term stability. Additionally, when the U.S. threatened Japan with an oil embargo in July 1941, rather than forcing compliance, coercive diplomacy instead provoked Japan into a decision for war, demonstrating the risks of miscalculated coercion (Lovelace, 2016). In case of 2011 Libya War coercive diplomacy failed and was followed by use of force. This suggests that, in certain cases, the threat of force alone lacks sufficient strength or credibility to fully deter further violations, making military intervention necessary to achieve coercive objectives.

Consequently, four levels of coercion can be identified based on the aforementioned examples: diplomatic pressure, demonstrative use of force, limited military actions, and full-scale war. While diplomatic pressure and demonstrative use of force can be classified as grey zone tactics, limited military actions and full-scale war fall within the realm of conventional warfare. This distinction underscores the complexity of modern conflicts, where elements of both hybrid and conventional warfare intersect, shaping strategic outcomes.

COERCION AND FORCE IN WARFARE: THE SOUTH CAUCASUS AS A BATTLEGROUND

When discussing regional security in the South Caucasus, it is essential to recognize a specific form of security breach—one in which a state is coerced by an external power into making policy decisions that contradict its national interests. This phenomenon is best illustrated by Armenia, which, after years under Russia’s influence, is now seeking Western support, or by Georgia, a staunch NATO aspirant that has adopted a more cautious approach toward Russia for the last couple of years. In contrast, Azerbaijan, often viewed as a neutral or non-aligned country, has maintained a consistent foreign policy stance for decades while simultaneously strengthening ties with its strategic partners, demonstrating that non-alignment does not preclude having allies. The South Caucasus is a strategically significant region, situated near three major and ambitious Eurasian powers: Türkiye, Russia, and Iran (Iskandarov, 2019). Among them, Türkiye serves as a counterbalance to the Russia-Iran tandem, while Russia remains the most influential actor, viewing the region as part of its so-called “near abroad.” The Russia–Iran partnership in the South Caucasus is far from monolithic, as their

interests frequently diverge. Similarly, although Türkiye and Russia often appear as rivals, their relationship has also been marked by pragmatic accommodations. These alliances are best understood as fluid and situational, shaped by both convergence and contradiction. At the same time, there is a significant overlap of interests between the broader West (the EU and the United States) and Türkiye, particularly with regard to strategic objectives such as ensuring a continuous and secure flow of oil and gas from Central Asia and the Caspian Sea to Western markets. This entails the construction of routes that bypass both Russia and Iran, thereby opening Central Asian energy reserves to the world while minimizing the risk of obstruction or blockade by Moscow. The peace agreement brokered by the United States in Washington on August 8 may be interpreted as a strategic victory for the West together with Armenia and Azerbaijan, especially given that Iran had previously declared such an arrangement a “red line.” From Tehran’s standpoint, Russian control of the corridor is far more acceptable than the presence of either a U.S. company or Türkiye extending influence up to its northern border. Indeed, without American involvement, it is doubtful that Armenia would have been willing to engage in negotiations, regardless of the dividends it stands to gain from the opening of communications through establishing the Trump Route for International Peace and Prosperity (TRIPP). The region has experienced the repercussions of both hybrid and conventional warfare for decades. The elements of hybrid warfare were first observed in Azerbaijan and Georgia, countries that actively sought to escape Russia’s sphere of influence. A key objective in Russia’s strategy to maintain control over its “near abroad” was to integrate the South Caucasian states into the Russia-dominated Commonwealth of Independent States (CIS). Achieving this goal required minimal effort with Armenia, but proved far more challenging with Azerbaijan and Georgia. However, even Armenia was not initially a steadfast Russian ally in the early 1990s. Armenia initially attempted to establish good relations with Türkiye, but when those efforts failed, it turned to Russia as its primary strategic partner. This shift solidified Russian influence, with Russian troops remaining stationed in Armenia (Iskandarov, Gawliczek, 2020a; Iskandarov et al., 2019; Sadiyev et al., 2021). Thomas de Waal (2003) observes that individual Russian military units and officers provided both direct and indirect support to Armenian forces, primarily through arms transfers and at times, even battlefield assistance, against the backdrop of reports that Russia also supplied weapons to Baku. Indeed, Azerbaijan procured weapons from Russia, which effectively constituted the primary, and in many instances the sole, source of military supplies available to Baku. However, it should not be interpreted as evidence that Russia supported Azerbaijan. This fact underscores the strategic complexities of acquiring arms from a state that simultaneously supported Armenia, reflecting the ambivalent nature of Russian involvement in the conflict. By leveraging diplomatic pressure, military posturing, and economic influence, Iran seeks to assert its role as a regional power while deterring actions that threaten its interests. Though its coercion has primarily relied on threats—such as military exercises near borders, rhetoric against foreign influence, and economic leverage—it does not exclude the potential use of force if deemed necessary. Azerbaijan may be considered the foremost country in the region where this approach is evidently observed. Consequently, the Iran–Azerbaijan relationship is marked by a complex interplay of cooperation and competition, with their divergent al-

liances and strategic priorities continuing to shape bilateral interactions. For instance, the relations were further strained by the terrorist attack on the Azerbaijani embassy in Tehran in 2023, which resulted in the death of a security officer and heightened diplomatic tensions. However, Pezeshkian's visit to Azerbaijan on 28 April 2025 – the first visit by an Iranian president to the country in six years – represented a significant diplomatic effort to restore bilateral relations. Apart from it, Iranian President visited the Karabakh economic region on July 4, 2025. This visit marked the first time an Iranian president has traveled to the region since its reintegration into Azerbaijan. President Pezeshkian reaffirmed Iran's recognition of Azerbaijan's sovereignty, describing the region as an inseparable part of Azerbaijan (Tasnim News Agency, 2025). Iran's approach in the South Caucasus is shaped by its geopolitical concerns, including border security, influence over neighboring states, and the presence of external actors such as Türkiye, Russia, and Western powers. This suggests that vested interests in the South Caucasus are not limited to regional powers. The region's strategic importance extends far beyond, attracting the involvement of global actors including the United States, the European Union, the United Kingdom, Israel, and China. However, an analysis of the past decade reveals that Iran's objectives have largely aligned with Russia's, while Türkiye and the West have shared a common stance. However, tensions between Türkiye and certain European countries, such as France, present a notable challenge, providing strategic advantages for the Russia-Iran tandem. For instance, despite differing strategic objectives, both countries derived advantages from the prolonged nature of the conflict. The external powers play a significant role in shaping the geopolitical landscape, each pursuing its own strategic, economic, and security interests in the region. Although this paper does not provide a detailed analysis of these actors' interests, various works by Cornell (2001; 2006) de Waal (2003) and Iskandarov et al. (2021) explore this subject in depth, offering valuable insights into the region's dynamics.

Coercion through threats or the use of force remains a defining feature of the security landscape in the South Caucasus, fueled by unresolved territorial disputes, geopolitical rivalries, and competition for regional influence. Efforts to promote peace, stability, and conflict resolution are frequently hindered by the complex interplay of historical grievances, ethnic tensions, and external interference, making sustained progress in the region particularly challenging. Therefore, when analyzing security dynamics in the South Caucasus, one cannot overlook the role of non-regional actors, whose influence – whether direct or indirect – continues to shape the region's geopolitical landscape. There are two cases where coercion has been used as a tool to compel an opponent to comply with specific demands. In the first case, the confrontation occurs between two regional states (Armenia-Azerbaijan), while in the second, a non-regional actor intervenes in the internal affairs of a regional state (Russia-Georgia).

Coercive diplomacy and the use of force as a means of coercion are widely debated, particularly regarding the objectives of the actors employing them. For instance, the UN Charter prohibits the use of force or the threat thereof against the territorial integrity or political independence of any state. However, this raises the question of whether states seeking to restore their territorial integrity can legitimately apply such strategies within the framework of international law. States seeking to restore their territo-

rial integrity may argue that they can legitimately apply coercive strategies within the framework of international law, particularly under Article 51 of the UN Charter, which recognizes the right to self-defense. However, such actions must comply with international humanitarian law, ensuring proportionality, necessity, and distinction between military and civilian targets. The legitimacy of coercion in these cases often depends on international recognition, the presence of an armed attack, and adherence to legal norms governing the use of force. For instance, Azerbaijan's strategy before, during, and after the Second Karabakh war can be seen as a prime example of coercive diplomacy and coercion through the use of force. Prior to the conflict, Azerbaijan engaged in diplomatic efforts while simultaneously strengthening its military capabilities, signaling both the willingness to negotiate and the capacity to act militarily if necessary. During the war, the decisive use of force played a critical role in achieving strategic objectives, compelling Armenia to accept a ceasefire and territorial concessions. Post-war, Azerbaijan has continued to leverage diplomatic and military pressure to consolidate its gains and influence regional dynamics, demonstrating the effectiveness of a synchronized approach to coercion. Thus, the presence of illegal armed groups in the Karabakh region posed a significant threat to the national security and democracy of the Republic of Azerbaijan. This security risk also undermined the confidence of internally displaced persons (IDPs) from Karabakh, who remained hesitant to return to their homes due to ongoing threats. As a result, their inalienable rights continued to be violated, preventing them from safely resettling in their rightful lands. The Russian peacekeeping contingent was deployed immediately after the signing of the Tripartite Statement between Armenia, Azerbaijan, and Russia. However, the withdrawal of Armenian forces was delayed, resulting in continued security threats. This failure to comply with the agreement ultimately necessitated a counterterrorism operation to eliminate illegal armed groups and restore stability in the region. The counterterrorism operation conducted by the Azerbaijani Armed Forces began on September 19, 2023, at 13:00 and concluded on September 20, following the disarmament of illegal armed groups in 23 hours and 43 minutes. As a result, the sovereignty of the Republic of Azerbaijan was fully restored. The analysis of the operation indicates that Azerbaijan fully adhered to the legal and human rights principles set by the Council of Europe. However, international organizations such as Freedom House and Armenian sources (Harutyunyan, 2025) have claimed that the operation led to civilian casualties and the mass displacement of Karabakh Armenians. There is no verified evidence of civilian casualties during the operation, as Azerbaijan employed high-precision weaponry to exclusively target military objectives. Regarding the displacement of the local population, publicly available video recordings show civilians voluntarily leaving the region, despite Azerbaijan's official declaration that Karabakh Armenians are citizens of Azerbaijan with equal rights alongside other minorities. While Azerbaijan had the capability to neutralize all members of the illegal armed groups, it instead provided them with the opportunity to surrender and leave its internationally recognized territory. This approach underscores that Azerbaijan did not exceed what was necessary to maintain peace and security in the Karabakh region. Moreover, there is no credible evidence to suggest that Azerbaijan undermined the rule of law or democracy, contrary to claims made by critics of the operation (Hasanov et al, 2024).

However, the application of a similar strategy by another country facing the same challenge in the region yielded opposite results years ago. Mikheil Saakashvili's attempts to restore Georgia's territorial integrity in 2008 backfired. His efforts to reassert control over South Ossetia led to a swift military intervention by Russia, resulting in the Russo-Georgian War. Instead of regaining lost territories, Georgia faced further territorial fragmentation, with Russia recognizing the independence of South Ossetia and Abkhazia, solidifying their separation from Georgia. The consequences of Georgia's failed coercive strategy were far-reaching. The war not only deepened the country's territorial losses but also weakened its geopolitical standing, exposing its vulnerabilities in the face of Russian military superiority. The conflict further strained Georgia's relations with Moscow while accelerating its pursuit of closer ties with the West, particularly through NATO and the European Union. However, despite increased Western support, Georgia was unable to reverse the territorial status quo, as Russia established a lasting military presence in the breakaway regions. Approximately 17 years after the war, Georgia remains neither a NATO nor an EU member, despite its long-standing aspirations and efforts to integrate with Western institutions.

The July 2020 escalation between Armenia and Azerbaijan in the Tovuz border region exemplified the use of force as a coercive tool. While many perceived it as a routine clash between two warring parties, the reality was far more complex. Armenia sought to expand its so-called "security belt" around the occupied territories, further entrenching its control and altering the strategic balance in the region. The confrontation did not take place in Karabakh, the long-disputed region internationally recognized as part of Azerbaijan, which had been under occupation since the early 1990s. Had Azerbaijan launched an operation in Karabakh, third-party intervention in support of Armenia would have lacked legal justification. However, the escalation in Tovuz, an area along the internationally recognized Armenia-Azerbaijan border, presented a different strategic challenge. Armenia claimed that Azerbaijan sought to seize a military post within its internationally recognized territory (Tavush region), which, if true, could have provided grounds for third-party intervention under the Collective Security Treaty Organization (CSTO) – particularly from Russia, as Armenia had anticipated. Independent assessment reports (International Crisis Group, 2020; OSCE Minsk Group Co-Chairs, 2020; United Nations, 2020; Stronski, 2020) state that the clashes remained limited to the border zone and did not confirm any Azerbaijani incursion into Tavush. By requesting CSTO assistance, Armenia aimed to provoke a coercive response. However, the CSTO unanimously rejected Armenia's appeal, denying it external military support. Recognizing the geopolitical risks, Azerbaijan acted prudently and refrained from territorial advances, preventing any justification for outside intervention. Meanwhile, Türkiye's strong and unequivocal support to Azerbaijan played a crucial role in balancing regional power dynamics. As a key stakeholder in Azerbaijan's energy projects, Ankara's backing effectively neutralized coercive pressure, ensuring stability in the region (Piriyev et al., 2023). However, the confrontation also served as a precursor to the Second Karabakh War, highlighting the role of military force in signaling intent, testing enemy responses, and exerting pressure in broader conflicts.

The initiation of armed conflict generally necessitates protracted and comprehensive preparation, and both Georgia and Azerbaijan undertook such measures. In the aftermath of the 2003 Rose Revolution, President Mikheil Saakashvili and the United National Movement (UNM) adopted a multidimensional strategy that integrated military, diplomatic, and economic instruments with the overarching objective of reasserting Georgian sovereignty over the secessionist regions. In a comparable manner, Azerbaijan's conduct in the period preceding the 2020 Second Karabakh War illustrated a calculated synchronization of military modernization and diplomatic engagement, thereby underscoring the interplay between force development and international outreach in shaping strategic outcomes. Grounded in the pursuit of mutual national interests, President Ilham Aliyev advanced a model of multi-vector cooperation encompassing the United States, the European Union, GUAM and CIS member states, Türkiye, Iran, Israel, and Pakistan. He launched large-scale reforms and undertook decisive strategic measures aimed at enhancing Azerbaijan's standing in the international arena, while simultaneously constraining and neutralizing external actors from whom Armenia anticipated direct support in the event of confrontation. The analysis of the abovementioned cases highlights the critical role of power asymmetry, international response, and strategic calculations in determining the success or failure of coercive strategies. While Azerbaijan's efforts in 2020 led to a decisive military victory and territorial restoration, Georgia's actions in 2008 triggered an outcome that solidified its territorial fragmentation. The different trajectories of these conflicts underscore the complexity of coercion in hybrid and conventional warfare, demonstrating that the effectiveness of military coercion is influenced by several key factors, including the clarity of the threat, its credibility, and the proportionality of the force applied. It is important to note that no existing study provides a comprehensive list of factors or principles that determine the success or failure of coercion. The factors identified in this paper are derived from historical examples and case studies. In Georgia's case, the threat was clear and credible, backed by international law and Georgia's legitimate claim to its territories. However, the factor of proportionality was not adequately assessed, as Georgian leadership underestimated both Russia's willingness to intervene militarily and the formidable force Moscow was prepared to deploy in support of its objectives. This miscalculation proved costly, as it led to a swift Russian invasion, further territorial fragmentation, and long-term strategic setbacks for Georgia. In Azerbaijan's case, all three factors were meticulously calculated and strategically applied. Clarity of threat involved the restoration of its territorial integrity. Credibility was reinforced by UN resolutions calling for the unconditional withdrawal of Armenian forces. Proportionality was assessed based on the real strength of Armenian forces. Azerbaijan effectively neutralized Russia, Armenia's primary backer, through diplomatic means, reducing the likelihood of direct intervention. At the same time, it secured a counterbalance through its alliance with Türkiye, serving as a strong deterrent against any third-party interference. These well-assessed measures not only shortened the duration of the war but also ensured its successful termination on Azerbaijan's terms, demonstrating the effectiveness of a carefully executed coercive strategy.

Based on qualitative analysis, Expected Utility Theory (EUT) (von Neumann and Morgenstern, 2021) can be applied to assess how Azerbaijan and Georgia weighed the costs, benefits, and risks of coercion strategies in their respective conflicts. This theory helps explain whether an opposing state is likely to comply with or resist coercive threats based on a rational cost-benefit analysis. While various mathematical formulations of EUT (Blainey, 1988) exist, this analysis focuses on a qualitative approach, using factors such as military balance, diplomatic history, and geopolitical considerations. The following table presents the expected utility of different strategic options based on these qualitative factors.

Table 1

Expected Utility Theory applied to the case studies – 2008 Georgia-Russia war and 2020 Second Karabakh war

Decision	Probability		Utility		Expected Utility	
	Azerbaijan	Georgia	Azerbaijan	Georgia	Azerbaijan	Georgia
Launch military operation	High	Moderate	High	High	High	Moderate
Continue diplomatic negotiations	Low	Low	Moderate	Moderate	Low	Low
Maintain the status quo	High	High	Negative	Negative	Negative	Negative

Source: Compiled by the authors.

As shown in the table, both states had three strategic options:

1. Military operation to reclaim occupied territories (direct coercion).
2. Diplomatic negotiations with the opposing side (coercion through diplomacy).
3. Maintaining the status quo.

For both Azerbaijan and Georgia, military action had the highest expected utility due to the significant strategic benefits associated with territorial restoration. In contrast, diplomatic negotiations had a low probability of yielding meaningful results, given the reluctance of occupying forces to withdraw voluntarily. Maintaining the status quo carried negative utility, as it would prolong occupation, undermine state sovereignty, and weaken both states' reputation and credibility both internationally and domestically.

From a rationalist EUT perspective, both Azerbaijan and Georgia were incentivized to pursue military action, as its expected utility far exceeded that of other options. Azerbaijan's successful coercion strategy was based on raising the perceived cost of resistance for Armenia while minimizing the likelihood of external intervention. In contrast, Georgia's miscalculations—such as overestimating Western support and underestimating Russia's willingness to intervene—led to strategic failure, further territorial fragmentation, and long-term geopolitical setbacks.

CONCLUSIONS

The cases analyzed in this paper reveal that coercive diplomacy or use of force as a coercion can be successful under specific conditions. The involvement of external

powers underscores that coercion is not limited to regional actors but is also a tool of geopolitical competition among global powers. Success depends on strategic clarity, diplomatic maneuvering, and the ability to balance military action with broader geopolitical considerations. The comparative analysis of Azerbaijan's military strategy during the Second Karabakh war in 2020 and Georgia's failed attempt to restore territorial integrity in 2008 underscores the importance of strategic foresight and geopolitical awareness. Azerbaijan's success in reclaiming its occupied territories was largely due to its careful calibration of coercion, securing diplomatic relations, and maintaining proportionality in the use of force. In contrast, Georgia's miscalculation of Russia's willingness to intervene led to severe territorial losses and long-term geopolitical repercussions. These cases emphasize that coercion is most effective when threats are credible, proportionate, and supported by a broader strategic framework.

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ABSTRACT

Coercion through the threat or application of force, alongside other hybrid tactics, plays a critical role in shaping adversaries' decisions and influencing geopolitical dynamics. This paper explores how state actors utilize military intimidation, targeted kinetic actions, and strategic positioning to weaken opponents, deter retaliation, and create favorable conditions for broader hybrid operations. Focusing on the South Caucasus within a broader geopolitical context, the study examines historical and contemporary cases to assess the effectiveness, implications, and countermeasures associated with coercive force in hybrid and conventional warfare. By analyzing these dynamics, the research aims to provide a deeper understanding of how coercion is employed as a strategic tool and the ways in which targeted states respond to such threats. It highlights the strategic calculations, effectiveness, and risks associated with coercion as a tool of statecraft. The findings demonstrate that coercion, whether through threats or direct force, is shaped by factors such as power asymmetry, international response, and the credibility of deterrent measures. By understanding the complexities of coercion, policymakers and scholars can better anticipate the risks and opportunities associated with its use in contemporary international relations.

Keywords: hybrid warfare, conventional strategy, coercive diplomacy, military power, Expected Utility Theory

**PRZYMUS ZA POMOCĄ GROŹBY I UŻYCIA SIŁY W WOJNIE HYBRYDOWEJ
I KONWENCJONALNEJ: KAUKAZ POŁUDNIOWY JAKO STUDIUM
PRZYPADKU WOJNY ROSYJSKO-GRUZIŃSKIEJ Z 2008 R.
I DRUGIEJ WOJNY KARABASKIEJ Z 2020 R.**

STRESZCZENIE

Przymus poprzez groźbę lub użycie siły, wraz z innymi taktykami hybrydowymi, odgrywa kluczową rolę w kształtowaniu decyzji przeciwników i wpływaniu na dynamikę geopolityczną. Niniejszy artykuł podejmuje temat, w jaki sposób państwa wykorzystują zastraszanie militarne, celowane działania kinetyczne oraz strategiczne rozmieszczenie sił w celu osłabienia przeciwników, odstraszenia przed odwetem i stworzenia korzystnych warunków dla szerszych operacji hybrydowych. Koncentrując się na Kaukazie Południowym w szerszym kontekście geopolitycznym, badanie analizuje historyczne i współczesne przypadki w celu oceny skuteczności, konsekwencji i środków zaradczych związanych z przymusem w wojnie hybrydowej i konwencjonalnej. Poprzez analizę tych dynamik, badanie ma na celu pogłębienie zrozumienia, w jaki sposób przymus jest wykorzystywany jako narzędzie strategiczne oraz jak państwa będące celem takich działań reagują na zagrożenia. Podkreślono kalkulacje strategiczne, skuteczność i ryzyko związane z użyciem przymusu jako narzędzia polityki państwowej. Wyniki pokazują, że przymus – niezależnie od tego, czy opiera się na groźbach, czy na bezpośrednim użyciu siły – kształtowany jest przez takie czynniki jak asymetria sił, reakcje społeczności międzynarodowej oraz wiarygodność środków odstrasżających. Lepsze zrozumienie złożoności przymusu może pomóc decydentom i badaczom w skuteczniejszym przewidywaniu ryzyk i możliwości związanych z jego stosowaniem we współczesnych stosunkach międzynarodowych.

Słowa kluczowe: wojna hybrydowa, strategia konwencjonalna, dyplomacja przymusu, siła militarna, teoria użyteczności oczekiwanej