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Research article / Научная статья

The Economic Development Potential of BRICS+ and the New Development Bank: A Comparative Analysis with the World Bank and the IMF

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Abstract. This article provides a comparative analysis of the roles played by the World Bank, the International Monetary Fund (IMF), with the current and potential role that the BRICS+ alliance through its New Development Bank (NDB) in both financing and developing policy recommendations aimed at economic development among member countries. The World Bank and IMF have traditionally been the main institutions influencing global economic policies. However, the emergence of BRICS+ as a significant player in the global economy has added a new dimension to this landscape. While the Bretton Woods institutions promoted and often imposed neoliberal policies on countries recipients of financing, the NDB places its focus on strengthening their economic sovereignty. Using quantitative and qualitative methods, the article examines the approaches, methodologies, and implications of these institutions in providing financing and advice to countries seeking to strengthen their economic sovereignty. Drawing on a wide range of academic literature, official documents, and case studies, this article highlights the various strategies employed by these institutions and assesses their effectiveness in supporting countries in implementing sovereign economic policies. Based on this, the article provides recommendations for the wider and more comprehensive approach of the BRICS+ and its NDB in order to improve its effectiveness to help its member countries in meeting the challenges of the multipolar world that is shaping up.

Keywords: World Bank, IMF, BRICS+, NDB, economic sovereignty, recommendations, comparative analysis

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Introduction

The question of economic sovereignty has long been central to states seeking to maintain control over their policy choices and development trajectories. Within this framework, international financial institutions (IFIs) such as the World Bank and the International Monetary Fund (IMF) have historically exerted considerable influence by offering financial assistance and policy guidance to member states [1]. However, the rise of alternative alliances such as BRICS+ has begun to challenge the dominance of Western-oriented institutions, introducing new dynamics into the architecture of global economic governance.

Critics contend that the World Bank and IMF often prioritize projects that disproportionately benefit wealthier nations and multinational corporations, thereby undermining economic sovereignty, environmental sustainability, and domestic industrial development in the Global South [2]. The IMF's structural adjustment programs (SAPs) of the 1980s, in particular, have been widely criticized for deepening poverty and inequality by enforcing austerity measures without establishing the foundations for long-term, inclusive growth [3].

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In contrast to the World Bank and IMF — both of which remain heavily influenced by Western powers — BRICS+ promotes multipolarity and respect for national sovereignty in international affairs [4]. One of its central functions is to provide member states with a platform for coordinating economic policies and sharing development strategies. Unlike the prescriptive, conditionality-driven approach of the Bretton Woods institutions, BRICS+ emphasizes mutual cooperation, solidarity, and recognition of diverse development paths [5] (Table 1).

Table 1. Comparative Framework: Bretton Woods Institutions vs. BRICS+

Dimension	World Bank / IMF	BRICS+
Foundational Context	Established in 1944 at Bretton Woods to stabilize the post-war global economy and promote reconstruction and development	Emerged in the 2000s as a coalition of emerging economies seeking to reform global governance and reduce Western dominance
Governance Structure	Voting power weighted by financial contributions, giving the U.S. and European states disproportionate influence	Decisions based on consensus among members, reflecting principles of multipolarity and sovereign equality
Policy Approach	Conditional lending tied to structural adjustment programs (SAPs), emphasizing liberalization, privatization, and fiscal austerity	Emphasizes policy space, mutual cooperation, and respect for diverse development models without prescriptive conditionality
Development Philosophy	Prioritizes integration into global markets, often criticized for privileging foreign investors and multinational corporations	Advocates South–South cooperation, infrastructure investment, and industrial development tailored to national priorities
Impact on Sovereignty	Frequently accused of undermining economic sovereignty by imposing uniform policy prescriptions	Positions itself as a defender of sovereignty, offering alternatives to Western-led financial governance
Key Instruments	Loans, grants, technical assistance, and policy surveillance (IMF Article IV consultations)	New Development Bank (NDB), Contingent Reserve Arrangement (CRA), and policy coordination platforms

Source: compiled by Goran Sumkoski, Roman V. Manshin.

The debate over economic sovereignty has been a recurring theme in international political economy, particularly in relation to the influence of the Bretton Woods institutions. Scholars such trace the origins of the World Bank and the IMF to the post-war settlement, emphasizing their role in stabilizing the global economy and promoting reconstruction [6]. Yet, many researchers argue, the governance structures of these institutions — dominated by Western powers — have often constrained the policy autonomy of developing countries [7; 8].

A central point of contention has been the conditionality attached to IMF and World Bank lending. Some researchers demonstrate how structural adjustment programs (SAPs) systematically reduced policy space in the Global South, prioritizing fiscal austerity, liberalization, and privatization [9]. These measures, while intended to restore macroeconomic stability, frequently exacerbated poverty and inequality, critique of globalization as a process that undermines nations' development priorities [2].

In response to these dynamics, scholars have highlighted the emergence of BRICS+ as a counterweight to Western-dominated financial governance. O. Stuenkel situates BRICS within a broader “post-Western” order, in which emerging powers seek to reshape global institutions [10]. C. Roberts et al. underscores the group’s emphasis on multipolarity and sovereign equality, contrasting it with the hierarchical decision-making of the IMF and World Bank [11]. Similarly, G.T. Chin [5] and P. Bond [3] note that the New Development Bank (NDB) and the Contingent Reserve Arrangement (CRA) represent concrete institutional innovations designed to expand financial autonomy and development options for member states. Hence, this literature suggests a clear divergence in development philosophy: while the Bretton Woods institutions have historically promoted market-oriented neoliberal reforms under Western leadership, BRICS+ advances a model rooted in South–South cooperation, policy flexibility, and respect for diverse development trajectories. This contrast not only reflects competing visions of global economic governance but also raises fundamental questions about the future of sovereignty in an increasingly multipolar world.

Materials and Methods

The quantitative and qualitative methods were used in this research, with triangulating the results. The data was obtained directly from the sources of the World Bank, IMF, NDB, BRICS+, AIIB, as well from the authors that have researched these institutions. Historical approach was also employed in order to compare the approach, policy, volume of financing over the period when all these banks worked in parallel, which is between 2015 and 2024.

A comparative analysis of the World Bank, the International Monetary Fund (IMF), and BRICS+ highlights several fundamental differences in their approaches to global economic governance. The World Bank and IMF have historically advanced a relatively uniform set of neoliberal policy prescriptions, emphasizing fiscal austerity, liberalization, and privatization as conditions for financial support [6]. In contrast, BRICS+ promotes a more flexible and inclusive framework that acknowledges the diversity of member states’ development priorities and seeks to reinforce economic sovereignty [1].

Institutions created under the BRICS+ umbrella, such as the New Development Bank (NDB), provide alternative sources of financing that reduce reliance on Western-dominated international financial institutions (IFIs) and enhance member countries’ autonomy in decision-making [12]. Moreover, BRICS+ underscores the importance of South–South cooperation and the democratization of global economic governance, positioning itself as a counterweight to the concentration of power within the Bretton Woods system. By challenging the dominance of Western powers in global financial institutions, BRICS+ aspires to foster a more equitable and inclusive international economic order [3]. Nevertheless, scholars note that the BRICS+ alliance faces significant challenges, including diverging national interests among its members, institutional limitations, and the broader pressures of geopolitical competition with entrenched neoliberal systems and their institutions [13].

Policy Conditionalities, Financing Mechanisms, Governance Structures

The World Bank and the IMF have historically advanced a relatively uniform set of neoliberal policy prescriptions, emphasizing fiscal austerity, trade liberalization,

and privatization as conditions for financial support. These conditionalities, particularly during the era of structural adjustment programs (SAPs) in the 1980s and 1990s, significantly constrained the policy autonomy of borrowing states, often undermining domestic industrial strategies and social welfare systems. Critics argue that such measures prioritized macroeconomic stability and integration into global markets at the expense of poverty reduction and long-term development [14]. By contrast, BRICS+ promotes a more flexible and inclusive orientation. Rather than imposing prescriptive conditionalities, BRICS+ emphasizes policy space, mutual respect, and recognition of diverse development trajectories. This approach reflects a broader commitment to multipolarity and the defense of national sovereignty in global economic governance.

The financing strategies of the Bretton Woods institutions and BRICS+ also diverge significantly. The World Bank provides loans and grants for development projects, while the IMF offers balance-of-payments support, both typically tied to policy reforms [5]. These mechanisms, while extensive, have been criticized for reinforcing dependency on Western-dominated financial systems. In contrast, BRICS+ has established alternative instruments such as the NDB and the CRA. The NDB focuses on infrastructure and sustainable development financing, while the CRA provides liquidity support to member states facing short-term balance-of-payments pressures. These mechanisms are designed to reduce reliance on Western-led IFIs and to enhance the financial autonomy of member countries [12].

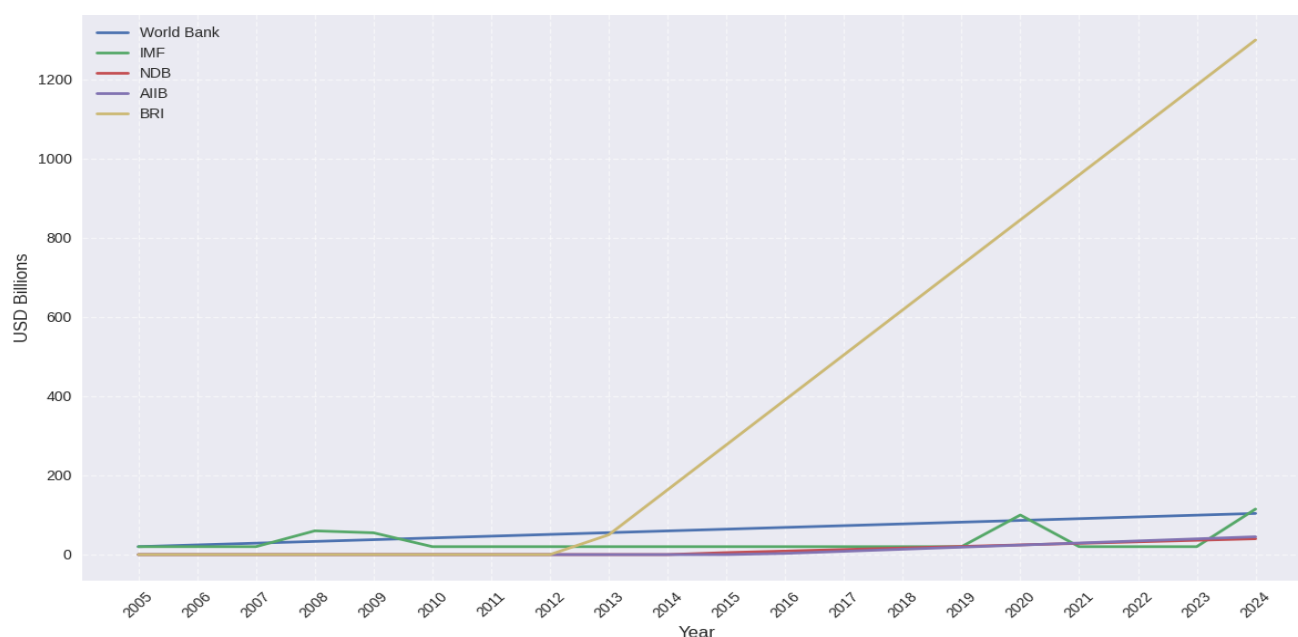
Governance arrangements further illustrate the institutional divide. The World Bank and IMF operate under a weighted voting system, where influence is determined by financial contributions. This structure grants disproportionate power to the United States and European states, limiting the voice of developing countries. By contrast, BRICS+ institutions emphasize consensus-based decision-making and sovereign equality among members. This governance model reflects the bloc's broader political commitment to democratizing global economic governance and challenging the concentration of authority within the Bretton Woods system [13].

Despite its ambitions, BRICS+ faces significant challenges in consolidating its role as an alternative to Western-led IFIs. Scholars highlight diverging national interests among BRICS+ members, and operating within a global system still dominated by neoliberal norms and entrenched financial institutions, which complicate collective action and policy coordination [13].

Comparison of Volume of Financing

A comparative assessment of the World Bank Group, the IMF, the BRICS NDB, the Asian Infrastructure Investment Bank (AIIB), and China's Belt and Road Initiative (BRI) illustrates the shifting landscape of global development finance. While these institutions differ in mandates, governance, and financing models, they also differ in the amounts of finance provided, which shape their contributions to global economic development. For the World Bank Group, commitments in FY2023 reached \$104 billion, a record high driven by climate finance and post-pandemic recovery lending. Disbursements were approximately \$70 billion [15]. IMF's total outstanding credit as of mid-2024 stood at around \$115 billion, with major programs in Argentina, Pakistan, and several African states. Lending spiked during the COVID-19 crisis and remains elevated due to debt distress in low-income countries [16]. By 2024, the NDB had approved \$40 billion in loans, with cumulative disbursements still lagging (around \$15 billion). Expansion to new

members (e.g., Bangladesh, UAE, Egypt) has broadened its portfolio [17]. By 2024, the AIIB had approved over \$45 billion in financing across more than 220 projects, with a growing emphasis on renewable energy and connectivity [6]. Cumulative BRI investments since 2013 are estimated at \$1.3 trillion by 2024, though estimates vary depending on methodology and inclusion of private-sector projects [18] (Figure). These trends highlight the diversification of global development finance, with BRICS+ and Chinese-led institutions offering alternatives to the traditional dominance of the Bretton Woods system.



Annual Commitments — Disbursements, 2015–2024

Source: created by Goran Sumkoski, Roman V. Manshin based on data from the World Bank Group, International Monetary Fund, New Development Bank, and Asian Infrastructure Investment Bank.

Results and Discussion

Potential Role of BRICS and National Development Bank

BRICS and its associated institutions like the NDB have great potential for historic significance, but for this to happen quickly, many strategic and operational objectives must be achieved. Brazil, Russia, India, China, South Africa (plus other countries that may join the collaboration) in developing recommendations for countries aimed at increasing economic sovereignty could be significant, and in several ways this could be accomplished.

The progressive weakening of state capacities under neoliberal globalization — often resulting in governments acting primarily as facilitators of transnational corporate interests — constitutes a major challenge to contemporary governance. This process has been widely criticized for eroding the autonomy of nation-states and subordinating public policy to the imperatives of global capital [18]. Overcoming this condition requires a deliberate effort to restore state sovereignty through the development of a coherent national ideology, long-term strategies, and comprehensive development plans. Equally important is

the strengthening of state capacity to ensure the political, economic, and social development of its people [19].

In the context of a multipolar world order, grounded in the principles of realism in international relations theory, there is no necessity for a prescriptive, universal ideology imposed from outside. Instead, operational decisions at the level of the nation-state should derive from the sovereign will of the people, enabling societies to manage their affairs in accordance with their own preferences, values, and historical trajectories [20]. This perspective aligns with critiques of neoliberal globalization that emphasize the importance of endogenous development models and the rejection of one-size-fits-all prescriptions [21].

The doctrine of the sovereign state thus becomes indispensable in the face of neoliberal de-statization, which has systematically disempowered governments and constrained their ability to formulate and implement sovereign strategies and visions. As Goran Sumkoski's research [20] demonstrates, neoliberal regulatory models often weaken institutional capacity and undermine the social foundations of governance, thereby limiting the ability of states to pursue independent development paths [22]. In this regard, the role of BRICS+ and its institutional mechanisms, particularly the New Development Bank (NDB), is of paramount importance. These platforms provide alternative sources of financing and policy space, enabling states to resist externally imposed conditionalities and to reassert their sovereignty in global economic governance.

1. Profound ideological changes in relation to the sovereign — the people of the nation-state — require changes in the incentive structure between economic, political and social factors laid down in fundamental acts such as constitutions.
2. Sovereign science, research and education, including economic science, must be reconsidered in accordance with the doctrine of the sovereign state and implemented both within the country and within the international academic network of sovereign states.
3. The adopted sovereign ideology and local scientific knowledge must be transformed into a national vision and strategy for sovereign economic development, supported by political and administrative structures and the people.
4. Achieving the vision and strategy of a sovereign state will require institutional changes and human resource development in public administration, political structures, and education.
5. The implementation, monitoring and evaluation of the economic model for sovereign states should provide support to economic actors from individual entrepreneurs to large corporations, including access to financing and innovation development.

Based on this vision and strategy, as well as practical operational areas of intervention, BRICS+ and the New Development Bank can help in the diagnosis, analysis and implementation of the structural elements of the nation's sovereign development while implementing the sovereign economic doctrine in the following areas:

- Institutions, management and administration of economic development.
- Implementation and construction of a fair economic system — participants and implementation of the strategy in action.
- Investments — public, private, policy and generation — public and private.
- Sectoral economic policy — targeted support for the unique advantages of the sector.
- Restructuring/Optimization of public and private companies — Business process reengineering.
- International economic cooperation.

- Sovereign financial flows for development.
- Infrastructure development — transport, energy, communications.
- Development of skills, know-how and knowledge — Human development.
- Increasing production and service potential, technologies, innovations.
- Development of micro, small and medium businesses.
- Local economic development.
- Natural and mineral resources.
- Trade, export promotion, marketing and branding of the national economy.
- Regulation and deregulation for economic development.
- Digitalization, e-governance, blockchain, artificial intelligence.
- Effective public administration.

Accordingly, BRICS+ and the New Development Bank can address the institutional vacuum left by decades of neoliberal policy-driven de-statization, supporting member states in rebuilding the institutional foundations of economic sovereignty. They will help formulate their own sovereign economic doctrine and provide the practical skills, knowledge, platforms, levers, and tools for its implementation. This will create the conditions for thriving economic development in the interests of all citizens of the nation-state and ensure a fair economy for all.

The Global Role of BRICS+ in Advancing Economic Sovereignty

The BRICS+ grouping — comprising Brazil, Russia, India, China, South Africa, and potentially other states seeking to align with its agenda — has emerged as a significant actor in global economic governance. Its role in developing recommendations for countries aimed at enhancing economic sovereignty is multifaceted, reflecting both practical initiatives and normative commitments to multipolarity and inclusivity in international relations.

One of the most immediate contributions of BRICS+ lies in the exchange of experience and knowledge transfer. Member states have pursued diverse paths to strengthen their economic sovereignty, ranging from China's state-led industrial policy to Brazil's emphasis on agricultural innovation and India's digital economy initiatives. By sharing best practices in economic governance, investment policy, and industrial development, BRICS+ can provide a repository of alternative models to the neoliberal prescriptions historically promoted by Western-led institutions [16]. This exchange is not merely technical but also ideological, as it reinforces the legitimacy of development strategies tailored to national contexts rather than externally imposed conditionalities.

BRICS+ also has the potential to institutionalize joint research projects and analytical reports that identify effective strategies for enhancing sovereignty. Collaborative think tanks, academic networks, and policy forums can generate comparative analyses of fiscal policy, industrial upgrading, and financial regulation. Such initiatives could culminate in operational plans that provide actionable guidance for states seeking to reduce dependency on external actors. By pooling intellectual resources, BRICS+ can counterbalance the epistemic dominance of Western institutions such as the IMF and World Bank, which often frame global economic debates through a neoliberal lens.

A further dimension of BRICS+ influence lies in the formation of common positions on key issues in international trade, finance, and regulation. By coordinating their

stances in multilateral forums such as the World Trade Organization (WTO) or the G20, BRICS+ countries can amplify their collective bargaining power. This unity enables them to challenge asymmetries in global economic governance, particularly those that privilege advanced economies. Common positions on issues such as financial regulation, debt restructuring, and digital trade could provide developing countries with a stronger platform to assert their interests and safeguard sovereignty [17].

Beyond discourse, BRICS+ has demonstrated a capacity to create joint institutions that provide tangible support for economic sovereignty. The establishment of the New Development Bank (NDB) and the Contingent Reserve Arrangement (CRA) exemplify this institutional innovation. These mechanisms offer financing alternatives that reduce reliance on the IMF and World Bank, thereby mitigating the policy conditionalities often attached to Western-led lending. Looking forward, BRICS+ could expand these initiatives by creating sector-specific funds (e.g., for green energy or digital infrastructure) and industrial support mechanisms that directly bolster domestic capacities in member and partner states.

Finally, BRICS+ plays a crucial role in diplomatic engagement and the shaping of international economic norms. By acting collectively in global forums, BRICS+ countries can exert influence over the evolution of standards in areas such as sustainable finance, digital governance, and climate-related investment. This diplomatic presence not only strengthens the voice of emerging economies but also contributes to the democratization of global governance, challenging the concentration of power in Western capitals. In this sense, BRICS+ is not merely a financial or economic bloc but also a normative coalition advocating for sovereignty, multipolarity, and inclusivity in the global order [6; 9].

The New Development Bank's (NDB) role in developing recommendations for countries focused on enhancing economic sovereignty is significant and relevant in the context of today's global economy. Technical advice, hard and soft infrastructure, and financing play a critical role in the NDB's efforts to support member countries in strengthening their economic sovereignty [22; 23]. The NDB's contribution can be summarized in the following areas:

Financing: The NDB's financing model is central to its role in enhancing economic sovereignty. Unlike the IMF and World Bank, which often attach policy conditionalities to their loans, the NDB emphasizes project-based lending aligned with national priorities. This approach allows member states to pursue development strategies without external interference in domestic policy choices [24; 25]. Furthermore, NDB financing promotes economic sovereignty by reducing dependence on traditional sources of financing and facilitating the diversification of financing options for member countries. The NDB provides member countries with financing for infrastructure and sustainable development projects through a variety of financial instruments, including loans, equity investments, and guarantees. For example, the NDB has financed renewable energy projects in India, water sanitation in South Africa, and transport infrastructure in Brazil. These projects not only address pressing development needs but also diversify funding sources, reducing reliance on Western-dominated institutions [24].

The NDB's role extends beyond financing. It represents a symbolic and practical shift in global governance toward multipolarity. While the AIIB dominates in hard infrastructure and the World Bank/IMF in policy frameworks, the NDB's comparative advantage lies in soft infrastructure and sovereignty-supporting

mechanisms. Technical advice, soft infrastructure and financing are integral components of the NDB's efforts to support member countries in strengthening their economic sovereignty, ultimately contributing to their economic independence and resilience. The decisive battle for economic sovereignty may well be fought in this domain [10; 26; 27].

Competition in the hard infrastructure sector continues, and the AIIB has surpassed the World Bank in terms of financing infrastructure projects around the world, such as roads, ports, railways, etc. Hard infrastructure — roads, ports, railways, and energy systems — remains a cornerstone of development finance and a critical determinant of economic sovereignty. Historically dominated by the World Bank, the sector has undergone a profound transformation in the past decade with the rise of multipolar financing institutions such as the AIIB, the NDB, and BRI. The AIIB and BRI have become leading financiers of roads, ports, railways, and power systems across Asia and parts of Africa and the Middle East. These actors have increasingly surpassed or complemented the World Bank in terms of financing volumes, particularly in Asia, Africa, and the Middle East [28]. The NDB complements this portfolio with sustainability-focused, member-priority projects. While aggregate World Bank commitments remain large, in several sub-regions and project classes, multipolar financing now exceeds World Bank-led volumes.

Since its establishment in 2016, the AIIB has rapidly scaled up to become a leading financier of transport, energy, and connectivity projects. By 2024, its cumulative approvals exceeded USD45 billion, with a strong emphasis on Asia but growing global reach. China's Belt and Road Initiative has become the single largest source of infrastructure financing globally, with cumulative investments surpassing USD1.3 trillion by 2024, spanning 87 countries [28]. The NDB complements these efforts by financing sustainability-focused, member-priority projects. Its portfolio includes renewable energy in China, water management in South Africa, and the Mumbai Metro Line in India. Despite maintaining large aggregate commitments (USD 104 billion in FY2023), the World Bank's share of global infrastructure financing has declined relative to multipolar institutions [29] (Table 2). While the AIIB has surpassed the World Bank in terms of infrastructure financing volume [11], the NDB's comparative advantage lies in regional projects that directly enhance sovereignty by reducing infrastructure gaps.

Table 2. Annual Hard Infrastructure Approvals, USD billion, 2015—2024

Year	AIIB	NDB	World Bank, hard infra subset	BRI, investment + construction
2015	1.5	1.0	18.0	90.0
2016	3.0	1.8	19.0	95.0
2017	4.2	2.5	20.0	100.0
2018	5.0	3.1	22.0	110.0
2019	6.5	3.8	23.0	115.0
2020	7.2	4.0	24.0	105.0
2021	8.0	4.5	25.0	110.0

Year	AIIB	NDB	World Bank, hard infra subset	BRI, investment + construction
2022	9.0	5.2	26.0	115.0
2023	10.5	6.0	27.0	118.0
2024	12.0	6.8	27.5	121.7

Source: compiled by Goran Sumkoski, Roman V. Manshin.

BRI dwarfs all other institutions in scale, though its financing is bilateral and less transparent. AIIB has surpassed the World Bank in annual infrastructure approvals in Asia and is expanding globally while total multipolar financing (AIIB + NDB + BRI) now exceeds World Bank-led volumes in most regions. The rise of multipolar hard infrastructure financing has three key implications:

- **Diversification of Sources:** Borrowers now have multiple options beyond the World Bank, reducing dependency and increasing bargaining power;
- **Sovereignty and Policy Space:** NDB and AIIB financing is less conditional, allowing states to pursue development strategies aligned with national priorities;
- **Shift to Soft Infrastructure:** While multipolar actors dominate hard infrastructure, the World Bank and IMF retain influence in soft infrastructure (policy advice, governance, standards). The decisive contest for sovereignty lies in this domain.

Where the NDB can play its most important role is in creating “soft” infrastructure, where the World Bank / IMF enjoys the greatest monopoly that it has built in the last 75 years, and where the decisive battle for the economic sovereignty of nation states is taking place. The World Bank exploits the importance of “soft” infrastructure — including institutions, regulations, rules, policies, and human capital — to maintain its dominance and exploitation. To achieve this goal, it provides global financial infrastructure, payment systems, and rating agencies, dominates currency and commodity exchanges, and creates global and national regulatory frameworks through technical assistance, capacity building, and policy advice to compel member countries to maintain their institutional structures, governance structures, and regulatory environments in line with the demands of the global neoliberal order. BRICS+ and the NDB should also go beyond grants, loans, and technical assistance, which provide advisory services, training programs, knowledge exchange, institution building, and advice on the development and implementation of sovereign economic policies. This means addressing the entire institutional, legal, financial, trade, political, educational, and other “soft” infrastructure, which is truly one of the greatest weapons of the current neoliberal system.

Soft Infrastructure Platforms:

While hard infrastructure — roads, ports, railways, and energy systems — has long been the visible face of development finance, the decisive contest for economic sovereignty increasingly lies in the domain of soft infrastructure. This encompasses the institutional, legal, financial, trade, political, and educational frameworks that underpin national development strategies. For the past 75 years, the World Bank and the IMF have maintained a near-monopoly in this sphere, embedding neoliberal norms through technical assistance, policy advice, and conditional lending [7; 26].

The World Bank and the IMF have leveraged their monopoly in soft infrastructure to maintain global influence. Their interventions include:

- Policy advice and conditionality: Structural adjustment programs and governance reforms tied to loans [9].
- Global financial infrastructure: Oversight of payment systems, credit rating frameworks, and regulatory standards [7].
- Knowledge production: Flagship reports (e.g., World Development Report, Global Financial Stability Report) that shape global policy discourse.
- Capacity building: Training programs for government officials, often embedding neoliberal economic principles [26].

Through these mechanisms, the Bretton Woods institutions have entrenched a neoliberal order that constrains sovereign policy space.

The New Development Bank (NDB) and the broader BRICS+ framework have the potential to challenge this dominance by creating alternative platforms for financial sovereignty, policy development, and knowledge exchange. Unlike hard infrastructure, where financing volumes can be measured in billions of dollars, soft infrastructure is about sovereign governing, institutional design, and knowledge production [22; 30]. The development and implementation of these soft infrastructure platforms by the New Development Bank can help strengthen the economic sovereignty of member countries, promote their economic development and strengthen their position in the global economy. The creation of an alternative to the SWIFT international financial messaging system will ensure secure, efficient, and transparent financial transactions between NDB member countries and their trading partners. The creation of mechanisms for exchanging national currencies between NDB member countries will reduce dependence on the U.S. dollar and other reserve currencies. The development of such platforms will help NDB member countries formulate and implement industry policy development strategies across various economic sectors. This should involve creation of centers of expertise, analysis, and research that will provide scientific support, analytical data, and professional expertise on economic development and management, developing digital infrastructure and connectivity platforms, access to finance for small and medium-sized enterprises (SMEs) and programs to promote entrepreneurship, innovation, and job creation in member countries. To this end, the NDB has a unique opportunity to develop the following soft infrastructure, which it can make available to all states around the world:

- Financial Sovereignty Mechanisms: Developing alternatives to SWIFT and promoting local currency financing to reduce dependence on the U.S. dollar.
- Currency Exchange Platforms: Establishing fair systems for exchanging national currencies among BRICS+ members.
- Policy Platforms: Supporting industrial policy, sectoral strategies, and sovereign economic planning.
- Research & Expertise Centers: Creating BRICS-focused think tanks and knowledge hubs to provide analytical support and policy advice.
- Digital Infrastructure: Expanding ICT access, promoting digital inclusion, and fostering innovation ecosystems.
- SME Support: Establishing entrepreneurship centers to provide training, mentoring, and access to finance for small and medium-sized enterprises.

These initiatives directly challenge the policy monopoly of the IMF and World Bank, which have historically shaped development strategies through conditionality [30] (Table 3).

Table 3. Strategic Implications of Soft Infrastructure Financing

Strategic Area	World Bank / IMF	NDB Potential Contribution
Global financial architecture	Dollar dominance, SWIFT reliance	Local currency settlement, alternative messaging systems
Policy frameworks	Neoliberal conditionality	Sovereignty-based industrial policy
Institutional design	Governance reforms aligned with Western models	Member-driven institutional innovation
Knowledge ecosystems	Global reports shaping discourse	BRICS-focused expertise centers
SME & innovation	Limited	Entrepreneurship hubs, job creation programs

Source: compiled by Goran Sumkoski, Roman V. Manshin.

While the World Bank and IMF dominate policy advice and knowledge production, the NDB and BRICS+ are emerging challengers, particularly in financial sovereignty and digital platforms. The “decisive battle” for sovereignty lies in expanding these alternative soft infrastructure platforms, where the NDB can reduce the structural dependence of member states on Bretton Woods institutions.

The scope and focus of World Bank technical assistance (TA) encompasses providing advice across a wide range of sectors, including infrastructure development, education, health, agriculture, and governance, as well as policy advice, capacity building, knowledge sharing, and institutional strengthening. On the other hand, NDB technical assistance is currently primarily focused on infrastructure development projects. This is also reflected in the assistance delivery mechanisms, where the World Bank provides technical assistance through various channels, including project-based assistance, policy dialogue, advisory services, training programs, and knowledge-sharing platforms, and often integrates technical assistance into project financing and lending operations. Meanwhile, the NDB provides technical assistance only through project-specific support and advisory services within the same projects.

Technical assistance has long been a central instrument of international financial institutions (IFIs) in shaping development trajectories. The World Bank has historically provided TA across a wide range of sectors — including infrastructure, education, health, agriculture, and governance — integrating it into lending operations and policy dialogue [31]. By contrast, the New Development Bank (NDB), as a relatively new institution, has concentrated its TA primarily on infrastructure development projects, reflecting its narrower mandate and member-driven priorities. This divergence reflects broader institutional philosophies: the World Bank’s emphasis on comprehensive development frameworks and policy conditionality versus the NDB’s focus on sovereignty-respecting, project-specific support.

The World Bank provides TA across multiple sectors, including macroeconomic policy, governance, social development, and institutional strengthening. Its TA is often embedded in structural reforms and policy-based lending. NDB focuses on infrastructure-related TA, such as diagnostics, project design, and implementation support. Its TA is narrower in scope but aligned with the principle of respecting national development strategies.

In terms of TA delivery mechanisms, the World Bank uses diverse channels — policy dialogue, advisory services, training programs, and knowledge-sharing platforms. It frequently integrates TA into lending operations, thereby linking financial flows with policy advice [31]. The NDB provides TA primarily through project-specific support, advisory services, and technical consultations embedded within infrastructure projects. Unlike the World Bank, it does not yet operate large-scale standalone TA programs [1] (Table 4).

Table 4. Comparative Scope and Delivery of Technical Assistance

Dimension	World Bank	NDB
Sectoral scope	Broad: infrastructure, education, health, agriculture, governance	Narrow: infrastructure-focused
Policy advice	Extensive, often tied to lending conditionality	Limited, project-specific
Capacity building	Training, institutional strengthening, governance reforms	Training linked to infrastructure projects
Knowledge platforms	World Development Reports, global databases, policy forums	Emerging centers of expertise, BRICS-focused
Integration with finance	Strongly integrated into loans and grants	Embedded in project financing only

Source: compiled by Goran Sumkoski, Roman V. Manshin.

The emerging areas of NDB's TA should evolve to meet the expectations of current and potential member states. Its activities can be grouped into four broad areas:

1. **Diagnostics:** Assessing infrastructure gaps, financial risks, and sustainability challenges.
2. **Recommendations:** Providing policy and project-level guidance aligned with national strategies.
3. **Transfer of Best Practices:** Facilitating South–South knowledge exchange on infrastructure governance and financing.
4. **Training and Knowledge Platforms:** Offering online courses, webinars, and seminars for government officials, entrepreneurs, and SMEs.

The NDB's technical consultations and expertise to member countries can help them formulate sound economic policies, formulate effective development strategies, and implement sustainable projects. These platforms can facilitate the exchange of experience, knowledge transfer, and consultation on best practices in various sectors, as well as support for the development of national strategies. Knowledge and training platforms can offer online courses, webinars, seminars, and other educational resources for entrepreneurs, government officials, and public figures. The creation of centers of expertise and analysis that will develop strategies and offer recommendations to support decision-making at the government and business levels facilitates the development of international cooperation between member countries and other countries.

Strategic implications are that the World Bank's TA has historically shaped global development discourse, embedding neoliberal policy frameworks into borrowing countries [27;30]. The NDB's TA, while narrower, represents an alternative model that emphasizes sovereignty, demand-driven support, and South–South cooperation. The decisive challenge for the NDB lies in expanding its TA beyond infrastructure to soft infrastructure domains — such as financial systems, digital

platforms, and industrial policy — where the World Bank and IMF still dominate. If successful, the NDB could redefine the balance of influence in global knowledge production and policy advice.

Expectations of BRICS and its international geopolitical and ideological platforms and institutions as NDB, and more importantly, their potential to promote the economic development of nation states, for better or worse, are shaped by the 75-year history of the Bretton Woods institutions and their legacy. This legacy is that the Bretton Woods institutions don't help countries develop, but rather impoverish them further, favoring multinational corporations over host economies, and to achieve this, corrupting host governments, exploiting and damaging them with their financing conditions, colonial behavior toward voting rights, and destroying all but the most valuable currencies, expecting that a basket of five global currencies, through which the entire world is forced to support Western economies, will continue to exploit the world for the benefit of a few.

Thus, nation-states have come to expect similar types, styles, levels, and diversity of services from any new institution or set of institutions seeking to replace or replicate the role of the outgoing Bretton Woods institutions. This creates several layers of challenges for BRICS+ and its institutions, such as the NDB, in terms of its mission, sustainability, predictability, reliability, both in strategic coherence, more institutional linkages, platforms, and instruments, and in parallel, the levels and scale of its operations.

The expectations placed on BRICS+ institutions in helping provide hard and soft infrastructure, and the very important role of technical assistance, training and education, are double-edged. On the one hand, they must replicate the scale and diversity of services offered by the Bretton Woods institutions to be credible alternatives. On the other hand, they must avoid reproducing the exploitative practices that discredited those institutions. This requires building institutional coherence and scaling up operations and expanding soft infrastructure platforms (financial systems, digital inclusion, SME support). If successful, BRICS+ and the NDB could redefine global development finance by combining the breadth of Bretton Woods services with a multipolar, sovereignty-based ethos.

The global neoliberal order has systematically weakened the role of states by transferring mandates and powers to international or quasi-national bodies, thereby eroding the sovereignty of nation-states [18; 27]. This process of de-statization has not only diminished the capacity of states to exercise independent policy-making but has also entrenched a governance model in which transnational corporations and global financial institutions dominate decision-making [6]. The ongoing decline of neoliberal ideology has created a vacuum — not only in competing ideologies but also in the skills, strategies, and institutional frameworks necessary for implementing a sovereign economic doctrine [22]. This vacuum presents both a challenge and an opportunity. For nation-states, it underscores the urgent need to reclaim policy space and rebuild institutional capacity. For BRICS+ and the New Development Bank (NDB), it highlights the organizational and strategic hurdles they must overcome to provide credible alternatives to the Bretton Woods institutions and to assist other states in doing the same [8; 32]. Despite their potential, BRICS+ and the NDB face several structural and organizational disadvantages that limit their effectiveness:

1. Weak ties between members: Divergent geopolitical interests and economic models among BRICS+ members hinder deeper integration.

2. Poorly developed organizational structure: Compared to the World Bank and IMF, the NDB's institutional framework remains relatively underdeveloped, limiting its global reach.
3. Underfunding: The NDB's capital base is modest relative to the scale of global infrastructure and development needs, constraining its ability to rival established institutions.
4. Insufficient development of soft infrastructure platforms: While the NDB has made progress in hard infrastructure, its role in financial systems, digital platforms, and policy frameworks remains limited.
5. Poorly developed spectrum of technical assistance: Unlike the World Bank, which integrates technical assistance into lending, the NDB's advisory services are still project-specific and narrow in scope.
6. Need to scale up globally: The NDB must expand beyond BRICS members to achieve systemic influence, yet this requires stronger governance and credibility.
7. Weak implementation mechanisms: Limited institutional capacity and coordination challenges reduce the effectiveness of NDB initiatives.

Despite attempts to destroy nation-states and limit their capabilities and powers, they remain the only level at which nations can exercise accountable governance, self-organization, and self-management. In this context, nation-states can legitimately build their own economic prosperity and way of life. A new sovereign economic doctrine must be built and promoted by BRICS+ and NDB, based on the doctrine of a sovereign nation state, establishing a common framework for sovereign nation states to find their own paths of political, social, and economic development in a multipolar world based on realism in the theory and practice of international relations [22]. The role of BRICS+ and the NDB is to develop their potential for facilitating this agenda.

Conclusion

The roles of the World Bank, IMF, BRICS+ and the NDB in promoting economic development reflect contrasting approaches to global economic governance. While the World Bank and IMF have historically promoted neoliberal policies that prioritize market-oriented reforms, BRICS+ and the NDB offer a focus on strengthening economic sovereignty and provide an alternative vision based on solidarity, mutual cooperation, and respect for national sovereignty. The analysis shows the waning impact of the Bretton Woods institutions in comparison with the rising BRICS+ and NDB impact that is compounded by organizations such as the AIIB and other bilateral financing platforms such as BRI. The article proposes recommendations for the NDB expanded its role in financing and especially in the area of soft infrastructure and technical advice provision. The article also highlights the structural barriers that the NDB is facing in this pursuit. Current historical circumstances and geopolitical changes present a unique opportunity for BRICS+ and the NDB to play a crucial role through their financing of hard and soft infrastructure, and technical assistance to become an essential part of this process.

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Экономический потенциал стран БРИКС+ и Нового банка развития: сравнительный анализ со Всемирным банком и МВФ

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Аннотация. Представлен сравнительный анализ роли Всемирного банка, Международного валютного фонда (МВФ) с текущей и потенциальной ролью альянса БРИКС+ через его Новый банк развития (НБР) как в финансировании, так и в разработке рекомендаций по вопросам политики, направленных на экономическое развитие стран-членов. Всемирный банк и МВФ традиционно являются основными институтами, влияющими на глобальную экономическую политику, однако появление БРИКС+ в качестве значимого игрока в мировой экономике добавило новое измерение к этому ландшафту. В то время как Бреттон-Вудские институты продвигали и часто навязывали неолиберальную политику странам – получателям финансирования, НБР уделяет особое внимание укреплению их экономического суверенитета. При помощи количественных и качественных методов рассматриваются подходы, методологии и роль этих институтов в предоставлении финансирования и консультаций странам, стремящимся к укреплению своего экономического суверенитета. Опираясь на широкий спектр научной литературы, официальных документов и тематических исследований, анализируются различные стратегии, применяемые этими институтами, оценивается их эффективность в поддержке стран в реализации суверенной экономической политики. На основании этого даются рекомендации по более широкому и всеобъемлющему подходу БРИКС+ и Нового банка развития в целях повышения его эффективности для оказания помощи странам-членам в решении задач формирующегося многополярного мира.
Ключевые слова. Всемирный банк, МВФ, БРИКС+, Новый банк развития, экономический суверенитет, рекомендации, сравнительный анализ

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Research article / Научная статья

Features and Systematic Development of Digital Transformation in the Housing and Utilities Sector

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Abstract. The article presents a systematic analysis of digital transformation in the housing and communal services (HCS) sector. Methods of comparative analysis, data synthesis, and a systemic approach were used to identify key directions of digitalization, such as the integration of BIM, IoT, and artificial intelligence platforms, as well as the automation of resource accounting and management. An analysis of the effectiveness of digital solutions was conducted, main barriers were identified, and recommendations for the development of the regulatory framework and personnel training were proposed. The results confirm the importance of a systematic approach to improving service quality and sustainable development of the HCS sector. This work contributes to expanding scientific understanding of digital transformation and may serve as a basis for further research and practical developments. **Keywords:** digital transformation, housing and communal services, BIM, Internet of Things, artificial intelligence, automation, quality management, systems analysis

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Introduction

Housing and communal services (HCS) face fundamental challenges related to infrastructure, digitalization, and fragmented management.

There is a need for transformation to improve service quality, energy and environmental efficiency, and institutional resilience.

The current digital context demands integrated cross-sectoral management models that unify processes and standardize data. Key barriers include the lack of unified legal frameworks, heterogeneous information systems, low digital literacy of personnel, resistance to organizational change, and high investment needs.

A comprehensive response requires creating a unified digital platform, standardizing energy efficiency assessment methods, and fostering partnerships among government, business, and academia.

Systematic adoption of digital technologies like BIM and IoT is crucial for better resource use and service quality. Research confirms that digital transformation reduces operational costs, enhances energy sustainability, and increases transparency.

Digitalization is recognized as a critical driver of HCS transformation, accompanied by multiple interrelated challenges.

As noted by R. Kh. Mutolapov [1], the global digitalization of housing and utilities facilities in advanced countries is at the stage of accumulating metadata and creating digital platforms, services and applications using IT solutions using artificial

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intelligence. This basic technical trend is already forming new requirements for infrastructure and industry management.

The corresponding challenges of technological transformation are confirmed in the study by A.V. Bashkireva and T.V. Bashkireva [2], who indicate that digitalization contributes to the integration of HCS into a single state information space, optimizing reporting processes and increasing the accuracy of resource accounting.

Further development of challenges is noted in the work of S.P. Chernov and E.A. Lyashenko [3], who confirm that the level of digital maturity and the resource base differ significantly between municipalities and constituent entities of the Russian Federation. This requires a differentiated approach to the implementation of digital initiatives: regional indicators are focused on integration with federal platforms, and municipal indicators are focused on the development of local solutions.

Active interaction with the population, which together reduces risks and accelerates digital transformation. The market context of HCS is considered in detail by N.I. Voronina and O.A. Saprykina [4], which show that digitalization is becoming a tool for increasing the competitiveness of management companies through the expansion of additional services and the development of industry marketing.

This confirms that digital transformations are not limited to technical improvements, but are closely related to the economic and marketing strategy of companies. In this regard, the socio-environmental component of digitalization is reflected in the work of I.N. Tkachenko and I.A. Chechulin [5], where the sustainable development of HCS is understood as meeting current life needs without compromising future generations, which is associated with the quality of life of the population. This approach sets a broader context for assessing the effectiveness of digital initiatives and requires integration into the strategic objectives of the industry.

The effectiveness of business processes and economic mechanisms transformed under the influence of digital technologies is confirmed in the work of U.A. Kurbanova, D.R. Makhmudova and G.R. Gargatsev [6].

The study records a significant potential of digitalization for restructuring, demonopolizing the industry, reducing costs and improving the quality of services, but highlights the most important challenge — a low level of strategic management that limits the success of implementation. Practical aspects of improving management through digitalization are additionally disclosed by I.S. Zimina [7], which draws attention to the possibilities of optimizing cost planning, supplier selection, labor organization and the introduction of lean technologies. These measures create conditions for increasing economic efficiency, which directly correlates with the challenges voiced earlier in the field of management. An important systemic confirmation of the importance of the integrated approach is the study of N.A. Simchenko, S.P. Reus and V.I. Filonov [8], which shows that the combination of modern digital technologies with cross-industry interaction leads to a significant reduction in transaction costs and the creation of a synergistic effect.

The interaction of industrial corporations in the implementation of digital twins contributes to the acceleration of economic growth by “adopting” best practices through digital platforms, which emphasizes the need for cross-industry coordination as a key factor in the sustainable development of the industry.

Thus, the logic of the identified challenges and problems of digitalization of HCS is confirmed by the complexity and interconnectedness of factors — from technological innovations and organizational transformations to social and economic aspects.

The introduction of cross-industry digital projects is becoming a prerequisite for overcoming existing limitations and ensuring comprehensive, sustainable development of the industry in the long term. Scientific articles published after 2024 confirm that digitalization in HCS and related real estate is a sustainable global trend.

The study by B. Al-Haimi et al. [9] provides a systematic review of digital technologies in the real estate sector, including the application of artificial intelligence (AI), the Internet of Things (IoT) and big data to improve the efficiency of residential asset management and sustainable development. that digital transformation is fundamentally changing the way housing is maintained and operated, making them more adaptive and cost-effective. An article by Ab. Bhaker from the World Journal of Advanced Research and Review [10] highlights the impact of AI on technological change in residential real estate, which contributes to improving predictive models for maintenance and resource management, improving the quality of services and reducing costs.

This scientific approach is associated with the global trend of introducing digital platforms for energy management and monitoring the state of the housing stock.

To systematize research directions, about 70 publications on current issues and future prospects of HCS were analyzed, focusing on digital transformation, cross-sector management, regulatory frameworks, energy efficiency, and socio-environmental aspects. The analysis results are shown in Figure 1.

The scientific discourse highlights digital transformation with integration of intelligent management systems, including artificial intelligence, IoT, and big data technologies, as the research priority. This trend reflects the need to improve operational efficiency, reduce costs, and increase transparency amid a rapidly evolving economic and technological landscape. The significance of digital technologies is confirmed by their ability to enable continuous infrastructure monitoring and adaptive resource management, essential for sustainable sector development.

Significant attention is given to the legal and regulatory framework underpinning digitalization, as process standardization and legislative harmonization enable large-scale innovation adoption and reduce legal risks. These reforms foster a unified digital space that optimizes information exchange and organizational procedures, enhancing market participants' trust and ensuring institutional resilience in HCS.

Equally important is the development of platform solutions and cross-sector collaboration, integrating data and processes to promote coordination and synergy among economic sectors. Digitalization is thus seen as a socio-technical process requiring a holistic approach that considers technical, organizational, social, and environmental factors.

Energy and resource saving research occupies a key role, with digital technologies automating consumption accounting and optimization, critical for environmental policy and economic efficiency. The socio-environmental dimension, focusing on quality of life and sustainability, expands traditional management to address long-term impacts and balance societal and ecosystem interests.

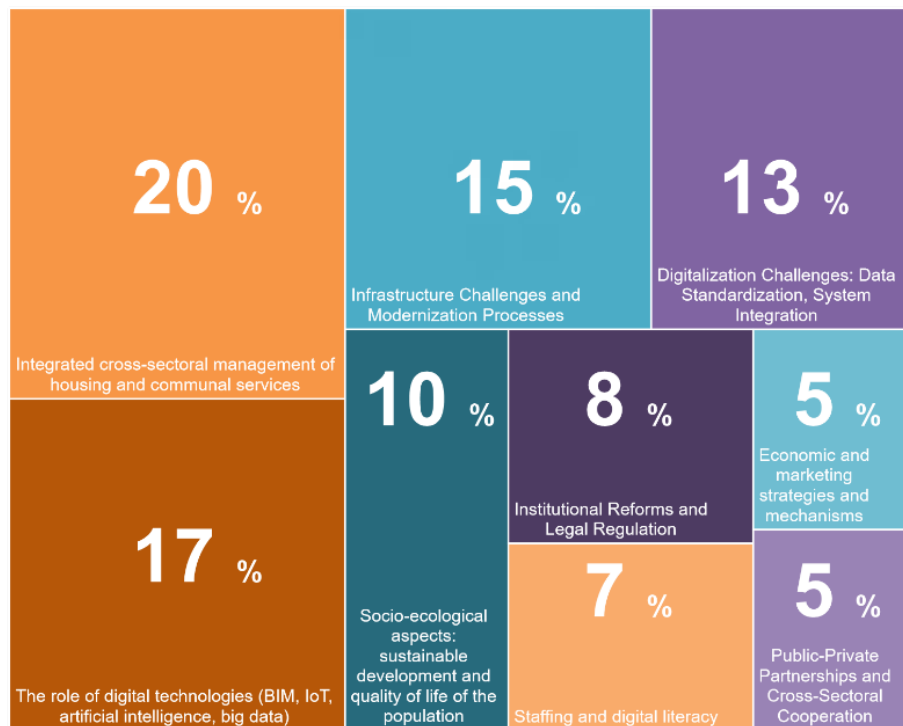


Figure 1. The Main Areas of Scientific Research and Priorities for the Digital Transformation of the HCS

Source: created by Anna Y. Verenikina, Alexey S. Budakov.

Future research and practice in HCS are expected to focus increasingly on developing integrated digital platforms with strong regulatory support that ensure technical, economic, and social sustainability. A systemic interdisciplinary approach involving stakeholders at all levels is vital for successful national digital economy programs and HCS modernization amid global challenges.

Current cross-sector coordination in HCS management involves building a comprehensive system integrating strategic and operational initiatives by government, utilities, and consumers. Central to this are unified management methodologies, digital platforms, and information-sharing mechanisms that enable flexible, adaptive governance aligned with digital economy demands and rising social-ecological expectations.

Pilot projects implementing cross-sector digital management models in communal infrastructure demonstrate high effectiveness by reducing operational and transactional costs, improving service quality control, boosting investment appeal, and strengthening the sector's financial stability.

Digitalization accelerates document flow, increases transparency and accountability, lowers administrative barriers, and improves payment discipline.

The theoretical basis for cross-sector management relies on a systems approach encompassing infrastructure, energy, construction, and social components of the communal sphere.

Institutional analysis highlights norms, rules, and coordination mechanisms as key influences on market behavior and integration success. Coordinating investment, design, construction, and operation through a unified digital platform facilitates lifecycle management of infrastructure assets.

This integrated management relies on formalizing interagency procedures and forming network coalitions to enable information exchange, data and process standardization, and unified models for assessing economic, social, and environmental efficiency. This creates conditions for a systematic approach aimed at sustainable development of the communal sector and improved service quality.

Together, these methodologies and digital tools help overcome the sector's traditional fragmentation, ensuring coordinated and comprehensive management of resources, infrastructure, and key HCS processes amid a dynamic external environment and intensifying digital transformation.

Cross-sector management is crucial for sustainable HCS development by integrating resources, technologies, and management functions across economic sectors to ensure long-term system resilience.

Consolidating material, financial, and intellectual assets synergistically enhances infrastructure utilization, service process optimization, and cost reduction.

Digital technologies play a vital role, especially BIM, big data, and IoT. BIM integration provides precise virtual models of infrastructure with comprehensive engineering, energy, and environmental parameters, optimizing design, operation, and maintenance throughout the lifecycle. This approach reduces energy and material consumption, boosts energy efficiency and ecological sustainability, and lowers failure rates through predictive monitoring of technical conditions.

Intersectoral coordination (Figure 2) serves as a fundamental instrument aimed at the systematic minimization of redundant duplication of functional responsibilities and processes across the diverse entities involved in HCS.

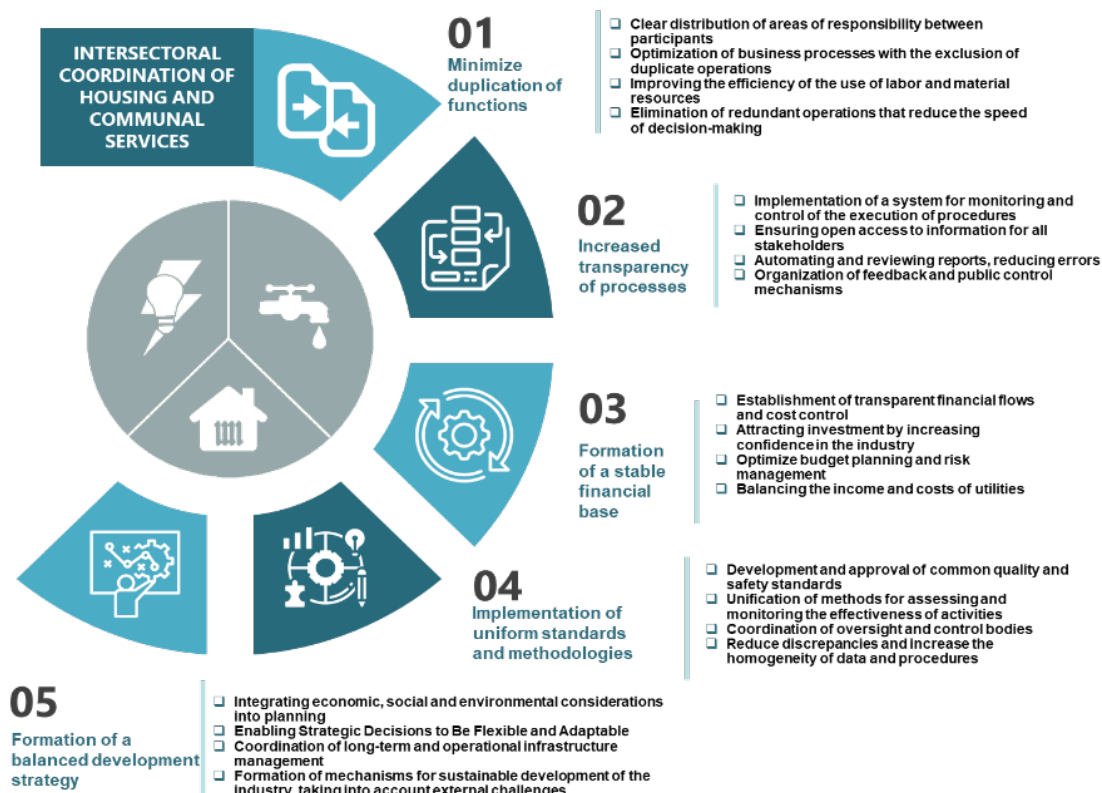


Figure 2. Key Directions of Intersectoral Coordination in the Sphere of the HCS

Source: created by Anna Y. Verenikina, Alexey S. Budakov.

This coordination leads to a substantial reduction of transactional costs, which typically arise from inefficient interaction and overlapping authorities among various stakeholders within the HCS market.

Enhanced transparency of operational and managerial processes, achieved through standardized control and reporting mechanisms, contributes to mitigating operational risks, thereby strengthening trust among investors and other interested parties.

Consequently, a stable financial foundation for the communal sector is established, which increases its investment attractiveness and supports the sector's long-term development. The implementation of unified standards and methodologies for evaluating effectiveness, sustainability, and management quality becomes an essential control mechanism, enabling regulation of the service level and quality provided.

This ensures the possibility to develop a balanced, multi-faceted development strategy for HCS that optimally accounts for economic parameters, social population needs, and environmental requirements.

Institutionalizing sustainable development principles in cross-sector management implies adopting a circular economy model focused on maximizing resource recycling, energy saving, and minimizing environmental impact. It integrates social responsibility to improve quality of life, increase accessibility and reliability of communal services, and promote equitable resource distribution.

Thus, cross-sector management establishes an organizational and technological foundation for transforming HCS into an innovative, sustainable system aligned with national digital, ecological, and social strategies.

Key barriers to cross-sector management development in HCS are interconnected systemic factors hindering integration and digital initiatives.

Insufficient standardization of data, processes, and technological protocols leads to fragmented information systems among sector actors.

This fragmentation impedes effective information exchange, reduces transparency, raises transaction costs, and undermines management quality. Unified exchange standards and integration protocols are critical for building a unified HCS digital space.

Organizational resistance remains significant, driven by entrenched bureaucracy, cultural conservatism, and institutional hierarchies within utilities and government agencies. Lack of motivation, ineffective change management programs, and poor internal communication slow cross-sector collaboration and digital adoption.

Limited human capital due to low digital literacy and shortage of IT, systems management, and big data analysis specialists constrains digital integration. Comprehensive capacity-building programs, including professional training, retraining, and upskilling, are essential to overcome this barrier and enhance transformation effectiveness.

Legal and regulatory uncertainty further complicates the development of cross-sector management and digitalization in HCS. The lack of clear standards, innovation efficiency assessment methods, and requirements for information security and data protection creates significant legal and economic risks for market participants. This regulatory ambiguity reduces investment attractiveness,

slows cross-sector strategy development and scaling, and causes imbalances in technological and institutional governance.

Financial and investment constraints act as an overarching barrier, linking shortcomings in standardization, workforce development, and regulation.

High upfront costs for digital technology adoption, infrastructure modernization, and human capital development strain municipal budgets, especially in economically weak regions.

The absence of sustainable financial models and public-private partnership mechanisms impedes phased scaling of digital solutions and cross-sector coordination, limiting the sector's strategic growth and long-term sustainability.

The identified barriers form a complex, interconnected system requiring a comprehensive, systemic, and coordinated approach for effective HCS development and digital transformation.

To overcome structural and institutional challenges in cross-sector HCS management, a set of measures targets creating systemic conditions for sustainable growth.

A key priority is developing a unified legal framework that standardizes digital technologies, data exchange procedures, and interaction among sector participants.

This framework includes formalizing information system requirements, unifying data exchange protocols, and establishing clear rules for information security and personal data protection, thereby reducing legal risks and facilitating digital ecosystem expansion.

Strengthening human capital through comprehensive professional education, retraining, and upskilling programs focuses on building digital competencies and cross-sector collaboration skills.

These efforts address workforce shortages and improve digital literacy, forming the foundation for adopting advanced management and IT technologies.

To ensure coordinated and transparent market participant interaction, interagency procedures are formalized and data exchange processes standardized within a unified HCS digital platform.

This platform integrates data infrastructure, automates document flow, and supports collaborative decision-making based on accurate, up-to-date information, enhancing management quality and responsiveness.

State policy promotes active coordination of strategic and operational initiatives, stimulates investment, and supports public-private partnerships to attract funds and advance technological levels in the communal sector.

Support for research institutions and competence centers facilitates technology adaptation and best practice dissemination.

The introduction of digital platforms and integrated monitoring systems provides an integrated approach to managing the life cycle of infrastructure facilities — from design and construction to operation and modernization.

The use of analytical tools to assess the effectiveness and sustainability of ongoing projects is based on multidisciplinary methods using quantitative and qualitative indicators, which allows for continuous monitoring and adjustment of strategies in real time.

Practical testing of technologies and models of cross-sectoral management is carried out through pilot projects, the results of which serve as the basis for the formation of a methodological base and scaling up successful solutions, taking into account the specifics of regional conditions and the scale of infrastructure.

A comprehensive approach to assessing the effectiveness of these projects includes the analysis of economic, social and environmental indicators, contributing to the formation of a sustainable and innovative model for the development of HCS within the framework of national strategies for the digital economy and social modernization.

Foundations for further research in cross-sector management of HCS require a comprehensive, multifaceted approach aimed at in-depth analysis and systematic organization of the integrative processes underpinning the efficient functioning of the modern communal sector.

Advancing methodological and analytical toolsets is essential, emphasizing the application of multidisciplinary system analysis, mathematical modeling, and big data techniques. These approaches enable precise identification of integration bottlenecks, optimization of managerial decision-making, and reliable forecasting of the impacts from deploying innovative digital technologies.

The development and harmonization of the legal and regulatory framework remain a pivotal research priority. It is crucial to consider the unique regional characteristics of communal systems, advocating for the creation of flexible regulatory mechanisms with adaptive requirements and a differentiated approach to standardization.

Such a regulatory construct would facilitate more effective digital technology adoption and innovation stimulation across diverse territorial and infrastructural contexts.

Special focus should be placed on the adaptation and customization of digital technologies, taking into account technical, socio-economic, and environmental attributes of regional communal systems.

Enhancing inclusive governance involves broadening stakeholder participation — government agencies, utility providers, research institutions, and end-users — in decision-making processes through collective governance models founded on openness and transparency principles.

Ensuring continuity and replication of successful cross-sector management practices requires establishing effective knowledge and experience exchange mechanisms.

These include the formation of interaction networks, sector-specific competencies, and dedicated platforms for disseminating innovative solutions. Such mechanisms are vital for accelerating the adoption of leading global and national practices and fostering the development of collaborative innovation models uniting diverse stakeholders within the HCS domain.

Future development prospects are linked to the creation of an innovation stratosphere — a synergy of institutional, technological, and educational conditions promoting sustainable and efficient digital interaction among all communal sector actors. Designing this environment entails building adaptive digital ecosystems characterized by high integration, automation, and intelligent management processes, thereby laying the groundwork for implementing national strategies in digital economy, environmental security, and social modernization.

Integrated cross-sectoral management (Figure 3) of the housing and utilities sector forms a single digital ecosystem that unites government agencies, utilities and consumers.

The most important role in this scheme is played by normative regulation and standardization, which create the legal basis for unified management (25%).

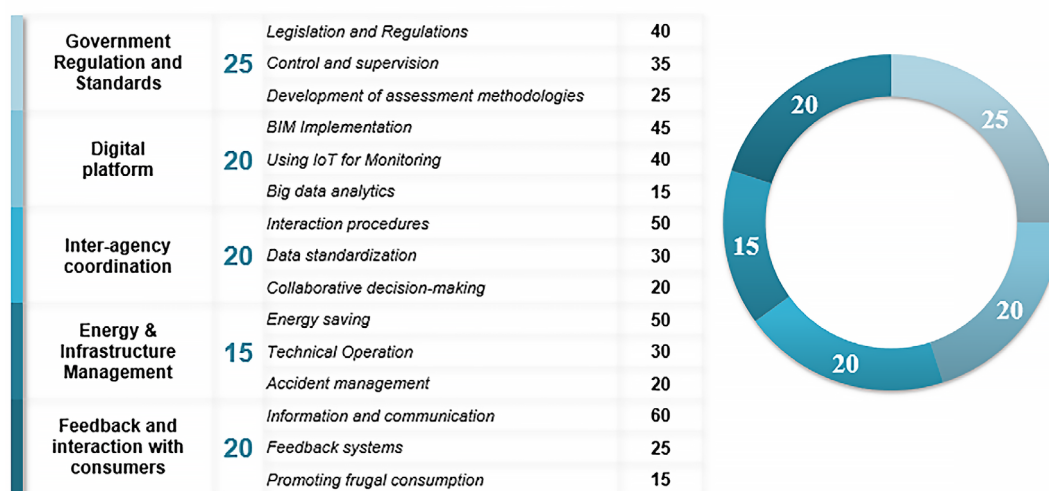


Figure 3. Framework for Integrated Cross-Sector Management in the HCS

Source: created by Anna Y. Verenikina, Alexey S. Budakov.

Judging by the estimates of management companies, the key sub-parameters — legislation and control — ensure the stability and transparency of processes.

Digital technologies, including BIM and IoT, are seamlessly integrated (20%) to improve monitoring and analysis.

Particular attention is paid to interdepartmental coordination, which optimizes information exchange and decision-making (20%).

Energy and infrastructure management (15%) aims to improve energy efficiency and prevent accidents. Interactive interaction with consumers (20%) helps to improve feedback and stimulate rational consumption. Such complexity provides flexibility and adaptability of management in a constantly changing environment of HCS.

Management companies identify key obstacles in the development of digitalization of HCS (Figure 4), of which the most significant is the lack of data standardization (30%). This leads to technical incompatibility of systems and complicates integration.

Fragmentation of information systems (20%) reduces the overall efficiency of management, creating silos and slowing down data exchange processes.

Low levels of digital literacy and resistance to new technologies (15%) hinder rapid innovation. Organizational barriers (15%), expressed in bureaucracy and lack of motivation, further reduce the speed of transformation.

Regulatory uncertainty (10%) and financial constraints (10%) create risks and discourage investment. Thus, the complex of these interrelated barriers requires comprehensive and strategically targeted solutions.

Digital transformation measures in the HCS sector (Figure 5) are based on the development and implementation of a regulatory framework and standards (25%), which ensures the orderliness and transparency of technological processes.

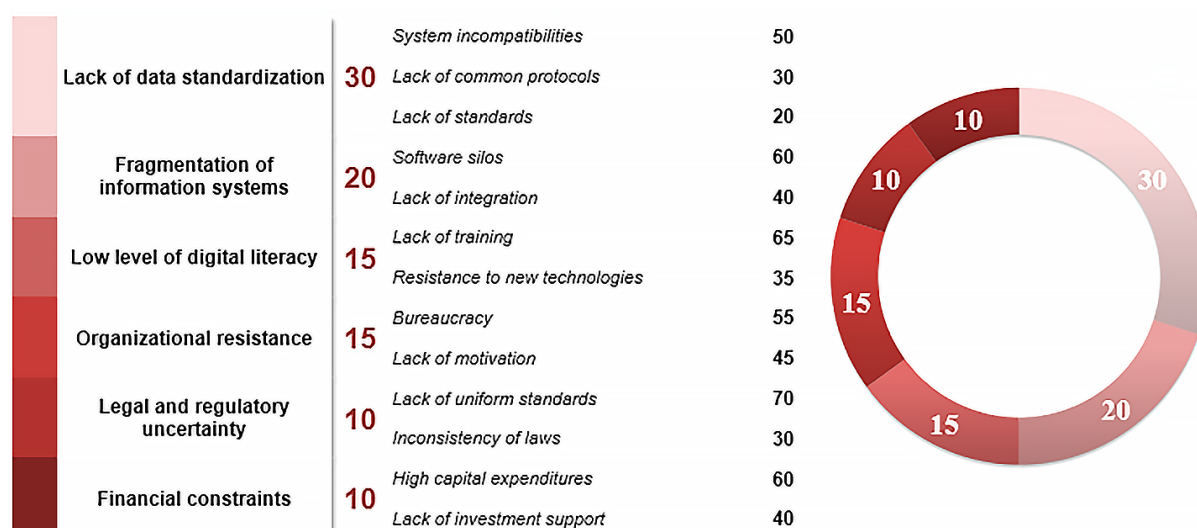


Figure 4. Main Barriers to Digitalization in the HCS

Source: created by Anna Y. Verenikina, Alexey S. Budakov.

Management companies emphasize the need for training through training and advanced training (20%), which creates the foundation for the development of digital tools.

The implementation of BIM, IoT and digital platforms (20%) expands monitoring and analysis capabilities, contributing to improving the quality of services.

Stimulating public-private partnerships and investments (15%) is seen as key to ensuring the financial sustainability of projects. Scaling and regional adaptation (20%) allow us to take into account territorial features and increase the efficiency of solution implementation. The combination of these measures is aimed at improving energy efficiency, reducing costs and sustainable development of the industry, which becomes the basis for a comprehensive modernization of HCS.

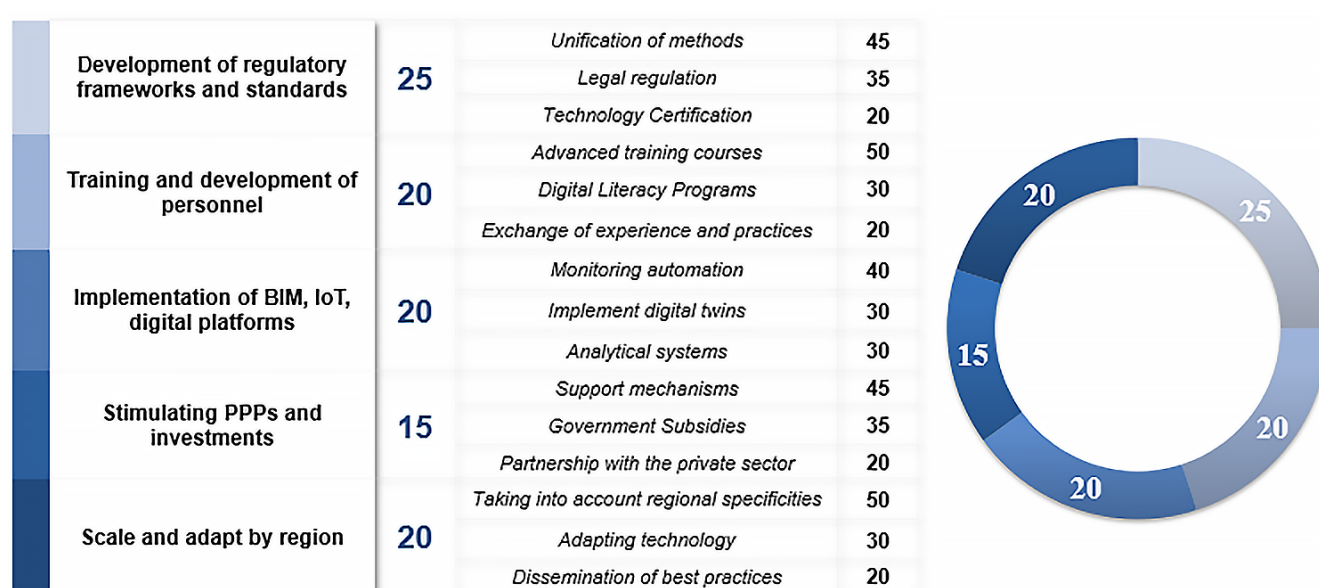


Figure 5. Measures and Prospects for Digital Transformation in the HCS

Source: created by Anna Y. Verenikina, Alexey S. Budakov.

In order to assess the development of the prospects for digital services, HCS also analyzed official statistics reflecting the dynamics of key indicators of the functioning of digital platforms (Figure 6).

INDEX	2021	2022	2023	2024	COMMENT
 USER SATISFACTION (%)	81,36	81,43	81,16	81,16	A STABLE LEVEL OF SATISFACTION INDICATES THAT THE QUALITY OF SERVICE IS MAINTAINED AT A HIGH LEVEL.
 NUMBER OF SERVICES RECEIVED (THOUSAND UNITS)	206,93	393,24	527,64	—	THE SIGNIFICANT GROWTH REFLECTS THE SCALING AND EXPANSION OF THE REACH OF DIGITAL SERVICES.
 NUMBER OF SERVICES (UNITS) IMPLEMENTED	21	29	31	31	THE INCREASE IN THE NUMBER OF SERVICES CONFIRMS THE DEVELOPMENT OF THE FUNCTIONALITY AND CAPABILITIES OF THE DIGITAL PLATFORM.

Figure 6. Key Indicators of Digital Platform Adoption

Source: created by Anna Y. Verenikina, Alexey S. Budakov based on data from fedstat.ru.

The current state of digitalization in the HCS sector is a comprehensive process aimed at increasing operational efficiency, transparency, and service quality through the implementation of integrated digital technologies.

The stability of user satisfaction indicators amidst a rapid growth in the number of services and offerings reflects a systemic success in maintaining service quality and adapting the population to emerging digital interaction formats.

Satisfaction serves as a crucial indicator of consumer adaptation and the digital maturity level of the platform, which is vital for strategic management of digital transformation initiatives.

Beyond technical enhancements, analyzing and considering user experience provides essential feedback that guides the refinement and development of digital services, taking into account regional and social peculiarities.

Scaling digital platforms consistently requires ongoing monitoring and the enhancement of digital literacy among the population, alongside timely identification and elimination of technological and organizational barriers.

In this context, user satisfaction is a systemic element integrated into comprehensive efficiency metrics and the broader institutional stability of the sector.

Balanced attention to user satisfaction levels facilitates resource and economic mechanism optimization, elevates investment attractiveness, reduces administrative barriers, and fosters trust among all stakeholders in the HCS market.

Collectively, these factors underpin the formation of a sustainable and innovative development model for the housing and utilities sector, supporting environmental security and social well-being over the long term.

Materials and Methods

In the present study, a systematic approach was employed, encompassing a comprehensive analysis of scientific literature, regulatory documents, official statistics, and results from pilot projects on digital transformation in the HCS sector.

The methodology was based on comparative analysis, data synthesis, and identification of patterns, which allowed for the formulation of generalized conclusions and the determination of key development trends.

Data sources included publications in peer-reviewed scientific journals, official reports from government bodies, conference materials, as well as open databases.

To assess the effectiveness of digital solutions, both quantitative indicators (such as the level of automation, the share of digital platforms, and trends in the user satisfaction index) and qualitative criteria (including the degree of process standardization, the level of digital maturity, and the integration of BIM, IoT, and AI-technologies) were applied.

Results and Discussion

The results presented herein are based on a comprehensive and consolidated analysis of the current state and trends within the digital transformation in the HCS. The analysis allowed for the identification of critical pathways and essential factors influencing the modernization of the industry.

In this regard, it is necessary to emphasize the following key outcomes:

- Key directions of digital transformation in the HCS were identified, including the implementation of integrated digital platforms such as BIM, IoT, and artificial intelligence, alongside the automation of resource accounting and service processes;
- It was demonstrated that digitalization significantly enhances management efficiency by increasing processing speeds of requests severalfold, reducing incident rates by approximately 30%, and raising the level of automation up to 40%;
- A positive trend in user satisfaction was confirmed, with a CSI of 4.7, indicating growing loyalty and trust of consumers in the HCS;
- Significant barriers to digitalization were revealed, including fragmentation of information systems, lack of unified regulatory frameworks, low digital literacy among personnel, and financial constraints;
- The importance of developing unified legislation, standardizing data and processes, and implementing training programs was substantiated to successfully scale digital initiatives;

- The role of cross-sector collaboration and integrated management models was emphasized as essential for sustainable and innovative sector development aligned with national digital and environmental strategies;
- These results collectively confirm that a systematic approach to digital transformation in housing and utilities contributes to enhanced service quality, improved economic efficiency, and sustainable sector development.

Main parameters of the results achieved and the main areas of focus are shown in Figure 7.

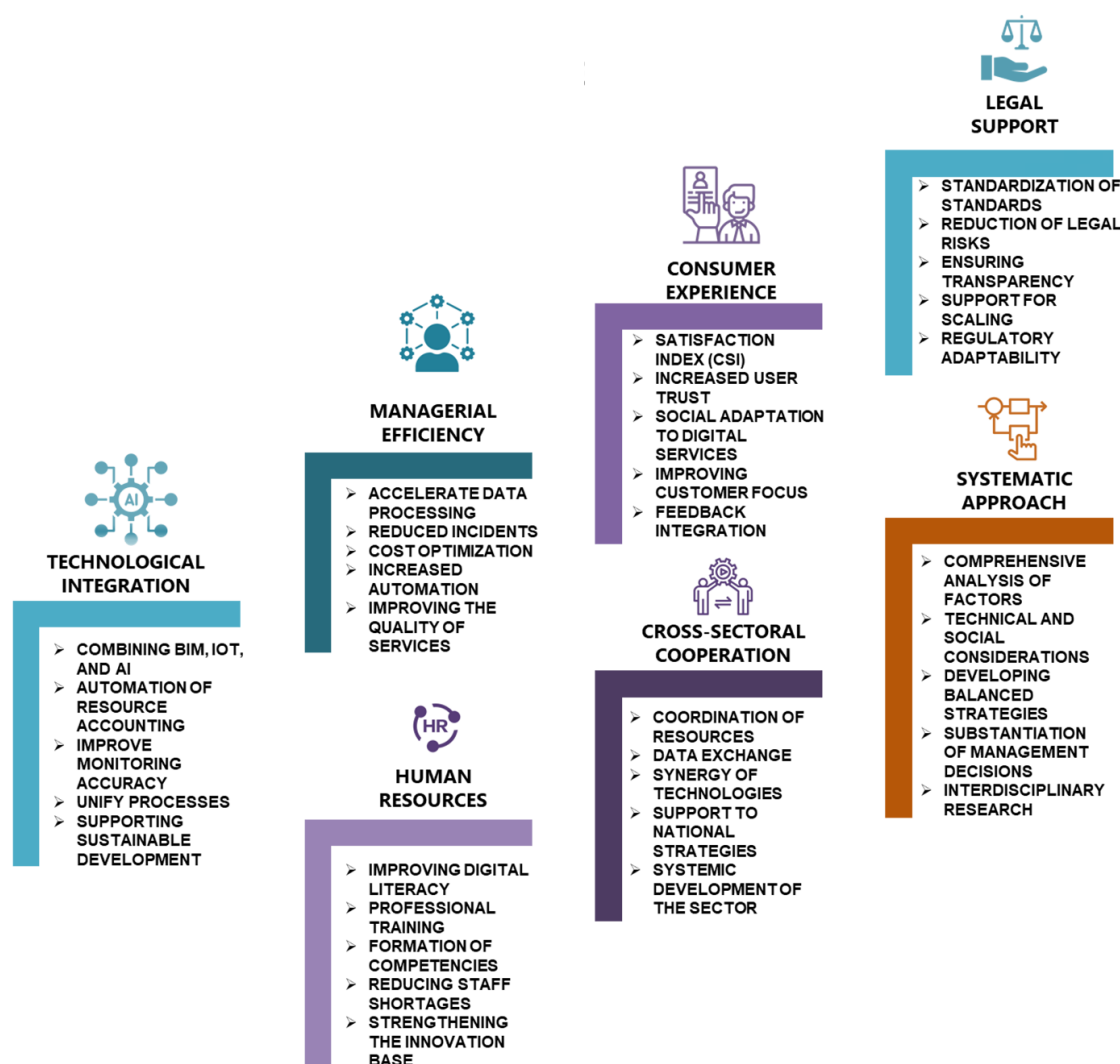


Figure 7. Main Parameters of the Results Achieved and the Focus of the Main Attention

Source: created by Anna Y. Verenikina, Alexey S. Budakov.

The comprehensive analysis corroborates prevailing trends identified in extant literature and emphasizes the imperative integration of digital platforms such as BIM, IoT, and artificial intelligence for the systematic modernization of the housing and utilities sector.

The observed augmentation in automation levels and concomitant reduction in incident rates substantiate the beneficial effects of digitalization; nonetheless, persistent challenges including information system fragmentation, absence of unified regulatory frameworks, deficiencies in digital literacy among personnel,

and fiscal constraints remain notable impediments. Future research endeavors should prioritize the formulation of cohesive legal and regulatory frameworks alongside specialized professional training programs.

Particular emphasis is warranted on investigating cross-sectoral collaboration and integrated management models, which are pivotal for fostering sustainable development and enhancing the sector's innovative capacity. Furthermore, empirical inquiries into user adaptation to digital services and rigorous evaluations of pilot projects implementing integrated platforms represent critical avenues for forthcoming scholarly investigation.

Conclusion

Digital transformation in the HCS is a systemic change in management approaches that enhances service quality, transparency, and environmental sustainability. The implementation of technologies such as BIM, the Internet of Things, and artificial intelligence enables optimization of infrastructure operations, automation of resource accounting, and predictive maintenance, reducing failures and costs. However, significant systemic barriers must be addressed, including fragmented information systems, lack of data standardization, low digital literacy among personnel, and regulatory uncertainty. Strengthening cross-sector cooperation, developing unified digital platforms, and implementing comprehensive training programs are critical for scalable and sustainable sector development. This transformation not only fosters economic efficiency but also builds consumer trust, improving the socio-environmental living conditions of the population.

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Особенности и системное развитие цифровой трансформации в сфере жилищно-коммунального хозяйства

А.Ю. Вереникина  , А.С. Будаков 

Финансирование. Настоящее исследование не получало внешнего финансирования.

Заявление об информированном согласии: не применимо.

Вклад авторов. Разработка концепции и методологии исследования, создание программного обеспечения, валидация и формальный анализ данных, проведение эксперимента, курирование и визуализация данных, подготовка черновика рукописи, а также администрирование проекта — А.С. Будаков. Разработка концепции исследования, валидация результатов, предоставление ресурсов, рецензирование и редактирование, общее научное руководство — А.Ю. Вереникина. Все авторы прочли и одобрили окончательную версию рукописи.

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Аннотация. Представлен системный анализ цифровой трансформации в жилищно-коммунальном хозяйстве (ЖКХ). С использованием методов сравнительного анализа, синтеза данных и системного подхода выявлены ключевые направления цифровизации, включая интеграцию технологий BIM, IoT и платформ на базе искусственного интеллекта, а также автоматизацию учета и управления ресурсами. Проведен анализ эффективности цифровых решений, обозначены основные барьеры и предложены рекомендации по развитию нормативной правовой базы и кадровой подготовки. Результаты подтверждают значимость системного подхода для повышения качества услуг и устойчивого развития сектора ЖКХ. Данное исследование способствует расширению научного понимания цифровой трансформации и может служить основой для дальнейших теоретических и прикладных разработок.

Ключевые слова: цифровая трансформация, жилищно-коммунальное хозяйство, BIM, Интернет вещей, искусственный интеллект, автоматизация, управление качеством, системный анализ

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Research article / Научная статья

Assessing ESG Commitment in BRICS Companies

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Abstract. While Environmental, Social, and Governance (ESG) principles are globally recognized, their implementation within the BRICS bloc is uniquely complex due to diverse socio-economic contexts, varied institutional environments, and the largely discretionary nature of ESG reporting. Existing research points to substantial disparities in ESG performance among these nations, yet a systematic comparative analysis remains underexplored. This study aims to quantitatively assess and compare the level and nature of ESG commitment within leading companies across the BRICS nations to illuminate these distinct national priorities. The study employs a term frequency (TF) methodology to analyze non-financial corporate reports from the top 10 publicly listed companies in each BRICS country, selected by market capitalization and other financial indicators. A specialized ESG dictionary was developed based on Bloomberg's rating methodology and categorized into four pillars: Environmental (E), Social (S), Governance (G), and Methodological (M). A Python script was used to calculate the frequency of these terms, providing a quantitative measure of disclosure focus. The analysis revealed significant heterogeneity in ESG reporting priorities across the bloc. Russian companies demonstrated the highest frequency of Environmental and Social terms. Chinese companies showed the strongest focus on Governance terminology. Brazilian companies led in the usage of Methodological and analytical terms. Overall ESG engagement, measured by total term frequency, was highest in China, followed by Brazil, with South Africa showing the lowest levels of disclosure.

Keywords: ESG, BRICS, term frequency, environment pillar, social pillar, governance pillar, methodology pillar

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Introduction

Environmental, Social, and Governance principles have become paramount in contemporary corporate strategy and investment decisions, driven by increasing awareness of sustainability challenges and the interconnectedness of business with societal well-being [1; 2]. While globally recognized as crucial for long-term value creation, their integration and implementation within emerging economies, particularly the BRICS bloc, present unique complexities [3]. The BRICS nations (Brazil, Russia, India, China, and South Africa) represent a significant and growing portion of the global economy, making their commitment to sustainable development through ESG practices critical for both regional stability and global progress [4].

BRICS countries are characterized by persistent socio-economic challenges, including pronounced inequality, social backwardness, poverty, food insecurity, unemployment, educational deficiencies, and inadequate infrastructure [5–7]. These systemic issues inherently complicate the adoption and effective implementation of robust ESG initiatives, often diverting resources and attention from sustainability efforts towards more immediate developmental priorities.

A key differentiator in the BRICS context is the predominantly discretionary nature of ESG reporting, contrasting with the more stringent, mandatory regulatory frameworks found in many developed economies [3]. This regulatory leniency means the region largely lacks comprehensive enforcement mechanisms to institutionalize a strong ESG framework. Even in BRICS nations like Brazil and

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South Africa, which have developed relatively advanced frameworks, enforcement often remains inconsistent [8]. Consequently, ESG strategies within BRICS entities may, at times, be driven more by external stakeholder pressures (e.g., international investors) than by deeply embedded corporate values or robust domestic regulatory impetus. Managers in BRICS companies thus face the dual challenge of aligning with evolving international sustainability standards while navigating fragmented domestic legal infrastructures and varying levels of corporate responsibility culture. This often results in significant heterogeneity in the maturity and depth of corporate responsibility practices across the region [5].

Despite the growing global emphasis on ESG, a comprehensive understanding of its nuanced implementation and commitment levels across the diverse BRICS bloc remains underexplored. Existing literature, while valuable, often suffers from a geographic imbalance, with a disproportionate focus on specific economies (e.g., China), thereby obscuring critical regional variations in ESG development and green finance [9].

Indeed, direct evidence underscores substantial disparities in ESG readiness and performance across BRICS countries [7]. Though classified as emerging economies, each BRICS member possesses distinct institutional environments, encompassing varied social, cultural, educational, and democratic characteristics. These country-level factors, alongside variations in transparency (e.g., corruption levels) and economic freedom, demonstrably influence companies' ESG practices and outcomes. For instance, notable differences exist in governance quality, with South Africa often cited for higher transparency and economic freedom compared to, for example, Russia (in terms of corruption) or Brazil (in economic freedom) [5].

The high standard deviation observed in ESG indices across the BRICS bloc further corroborates these significant intra-bloc disparities [10]. Furthermore, performance is not uniform across ESG dimensions, with certain BRICS nations demonstrating relative strengths in specific pillars (e.g., South Africa in Social and Governance; Brazil in Environment) [5].

Against this backdrop of diverse challenges and documented disparities, this study aims to systematically assess the level and nature of ESG commitment within BRICS companies. By providing a more granular and comparative analysis across the BRICS nations, this research seeks to fill critical gaps in the literature by illuminating the factors driving or hindering genuine ESG integration, and offering insights crucial for policymakers, investors, and corporate strategists navigating this complex landscape.

Materials and Methods

This study employs the TF methodology [11; 12] for an in-depth analysis of ESG information disclosure in the annual reports of publicly listed companies in BRICS countries. The method involves calculating the number of times a specific term appears in a text and dividing this value by the total number of terms in that text. This normalization accounts for document length, allowing for the comparison of term frequencies across texts of varying sizes. The formula is as follows:

$$TF(t, d) = (\text{Number of times term } t \text{ appears in document } d) / (\text{Total number of terms in document } d) \times 100.$$

To apply this methodology for assessing corporate engagement with the ESG agenda, the following steps were undertaken:

1. Developing an ESG dictionary. A specialized dictionary of ESG-related terms was defined for quantification in the reports.
2. Automated Text Analysis. A Python program was used to search for and count the occurrences of these keywords within the corporate annual reports, based on the developed ESG lexicon.
3. Quantitative Measurement. The TF formula was applied to the collected data to measure the degree of each company's engagement with the ESG agenda.

The ESG dictionary was developed based on the ESG rating methodology of the Bloomberg agency [13; 14]. Terms were selected for each of the three ESG components.

E (Environmental): Carbon footprint, Carbon neutral, Carbon offset, Carbon credit, Decarbonization, Emissions, Greenhouse gas, GHG, Renewable energy, Energy efficiency, Environmental Impact Assessment, EIA, Environmental Performance Index, EPI, Global warming, Climate change, Science-Based Targets, Streamlined Energy and Carbon Reporting (SECR), Embodied carbon, Emissions Trading Scheme, ETS, Biodiversity, Water risk management, Waste management, Circular economy, Sustainable resource use, Pollution prevention.

S (Social): Business sustainability, corporate sustainability, Human rights, Labor practices, Diversity and inclusion, Employee well-being, Health and safety, Community engagement, Stakeholder engagement, Supply chain management, Modern Slavery Act, Social impact, Social responsibility, Human capital management, Fair labor practices.

G (Governance): Corporate governance, Board diversity, Executive compensation, Anti-corruption, Ethics and compliance, Transparency, ESG disclosures, ESG rating, ESG integration, Risk management, Stakeholder rights, Whistleblower protection, Audit committee, Regulatory compliance.

Additionally, the dictionary was expanded to include general terms (e.g., ESG, ESG policy, ESG investment) and terms reflecting modern monitoring and reporting methodologies, such as Double materiality, dual materiality, ESG analytics, Predictive analytics, Prescriptive analytics, Value chain, Supply chain intelligence, Green market revolution, Sustainability reporting, and ESG framework. This part of the dictionary is called in the next parts of the paper "Methodological" (M) as it gives the clear idea how the E, S and G parts of the dictionary were analyzed in the original text.

The data for this analysis were sourced from the non-financial disclosures of the top 10 leading companies from each BRICS nation, selected based on sales, profit, assets, and market capitalization. Information was extracted from several types of corporate publications, which, despite differences in focus, exhibit significant content overlap, permitting their use in this analysis. These reports include:

- Sustainability Reports. These focus on the environmental, social, and governance aspects of a company's operations, aiming to describe its environmental impact, its relationships with employees and communities, and its corporate governance practices.
- Integrated Reports. These take a broader approach by linking ESG data with financial information, business strategy, risks, and opportunities to provide a holistic view of value creation.

- **Corporate/Social Reports.** These concentrate on a wide range of issues including corporate governance, transparency, stakeholder relations, and the company's contribution to society and regional communities.
- **Annual Reports.** While traditionally focused on financial performance, these documents increasingly include ESG-related information.

The reports, downloaded from official company websites or obtained via email request, were sequentially uploaded and processed using a Python script in Google Colab, which was configured to perform keyword searches, count frequencies, and calculate metrics. The resulting quantitative data was subsequently analyzed with descriptive statistics. Detailed information on each company, its official website, and the specific report used in this research is presented in Table A.

Results and Discussion

The results of the analysis of the frequency of occurrence of each group of terms from the given dictionary for each company in the sample are presented in Table.

Results of TF Analysis

Country	Company	E-frequency	S-frequency	G-frequency	M-frequency
Brazil	Petrobras	0.820	0.130	0.110	0.020
Brazil	Itaú Unibanco Holding	0.390	0.130	0.120	0.010
Brazil	Banco do Brasil	0.280	0.000	0.090	0.000
Brazil	Vale	0.400	0.140	0.090	0.040
Brazil	Banco Bradesco	0.410	0.100	0.180	0.010
Brazil	BTG	0.330	0.080	0.080	0.020
Brazil	JBS	0.470	0.100	0.060	0.330
Brazil	Centrais Elétricas Brasileiras	0.050	0.020	0.030	0.000
Brazil	Suzano	0.530	0.180	0.090	0.050
Brazil	Raízen	0.460	0.110	0.120	0.030
China	ICBC	0.140	0.070	0.170	0.010
China	CCB	0.000	0.010	0.270	0.000
China	ABC	0.420	0.020	0.170	0.030
China	Bank of China	0.020	0.010	0.200	0.000
China	PetroChina	0.700	0.120	0.130	0.020
China	Ping An Insurance Group	0.530	0.040	0.170	0.010
China	CMB	0.150	0.060	0.180	0.000
China	Tencent	0.480	0.040	0.230	0.010
China	Alibaba Group	0.480	0.050	0.150	0.070
China	Sinopec	0.480	0.170	0.240	0.010
India	Reliance Industries	0.070	0.020	0.080	0.010
India	SBI	0.300	0.110	0.170	0.090

Country	Company	E-frequency	S-frequency	G-frequency	M-frequency
India	HDFC	0.350	0.240	0.060	0.110
India	LIC	0.010	0.010	0.050	0.010
India	ICICI	0.510	0.100	0.230	0.050
India	Tata Motors	0.290	0.120	0.020	0.010
India	Axis	0.110	0.030	0.090	0.020
India	NTPC	0.180	0.110	0.110	0.060
India	L&T	0.260	0.050	0.180	0.020
India	BoB	0.130	0.040	0.050	0.010
Russia	Gazprom	0.300	0.180	0.090	0.000
Russia	Lukoil	0.650	0.080	0.180	0.020
Russia	Mechel	0.460	0.190	0.220	0.010
Russia	Novatek	1.160	0.200	0.120	0.020
Russia	Rosneft	0.520	0.060	0.100	0.010
Russia	Sber	0.170	0.090	0.250	0.000
Russia	Samolet	0.200	0.140	0.300	0.010
Russia	TCS	0.470	0.110	0.180	0.030
Russia	VTB	0.200	0.070	0.070	0.000
Russia	Yandex	0.320	0.030	0.020	0.000
S. Africa	FirstRand	0.020	0.010	0.040	0.000
S. Africa	SBG	0.110	0.040	0.150	0.010
S. Africa	Naspers	0.160	0.050	0.110	0.040
S. Africa	Absa	0.590	0.170	0.230	0.040
S. Africa	Sanlam	0.410	0.150	0.180	0.020
S. Africa	Nedbank	0.310	0.170	0.360	0.030
S. Africa	MTN	0.200	0.020	0.110	0.010
S. Africa	Gold Fields	0.190	0.050	0.080	0.010
S. Africa	Capitec	0.950	0.020	0.240	0.040
S. Africa	Momentum Metropolitan	0.380	0.080	0.110	0.040

Source: compiled by Svetlana V. Ratner, Marat V. Arutiunian.

The average values for each country broken down by each pillar in comparison with the overall frequency of ESG terms are shown in Figures 1–4.

As depicted in Figures 1–4, a comparative analysis of term usage frequency across different categories reveals distinct country-specific patterns. China demonstrates the highest frequency of general term usage, with South Africa recording the lowest. In the domain of environmental terminology, Russia exhibits the highest frequency, while India occupies the lowest position. Russia also takes the lead in the application of social terms, contrasting with China, which shows the lowest frequency in this category. For governance-related terms, China again displays the highest frequency, with Brazil registering the lowest. Conversely, South Africa leads in the usage of analytical terms, whereas Russia records the lowest frequency.

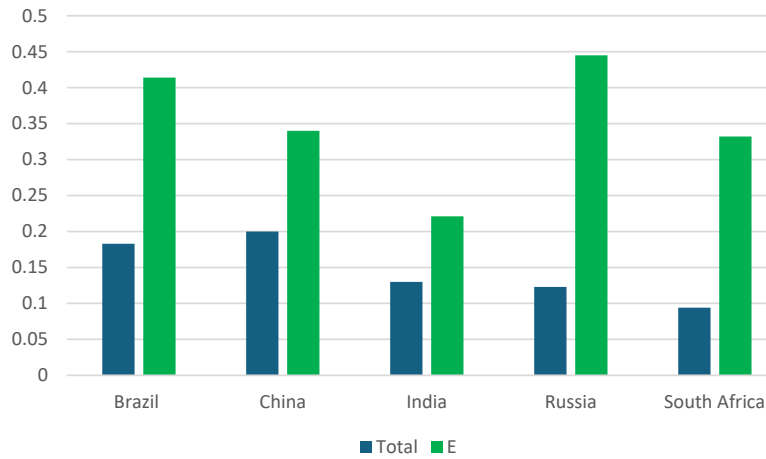


Figure 1. Term Frequency Analysis: Means for Each Country for the E-Pillar in Comparison with Total Frequency of the ESG Dictionary

Source: created by Svetlana V. Ratner, Marat V. Arutiunian in Python.

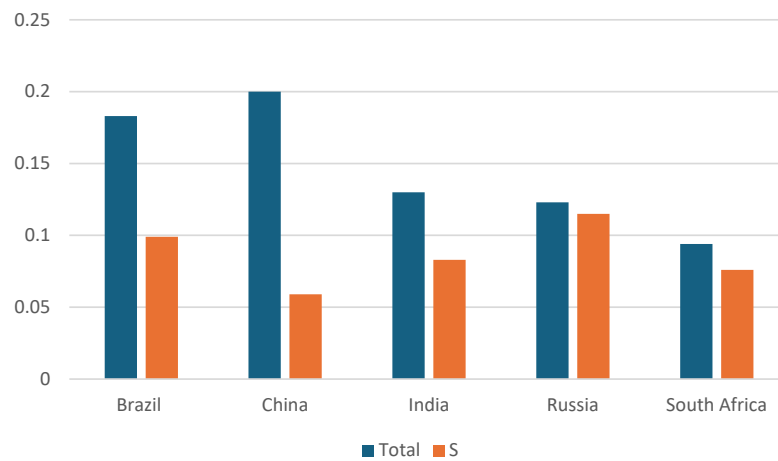


Figure 2. Term Frequency Analysis: Means for Each Country for the S-Pillar in Comparison with Total Frequency of the ESG Dictionary

Source: created by Svetlana V. Ratner, Marat V. Arutiunian in Python.

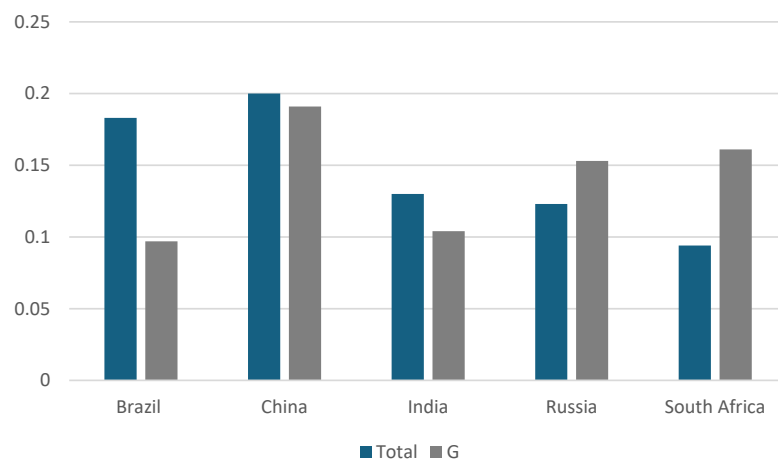


Figure 3. Term Frequency Analysis: Means for Each Country for the G-Pillar in Comparison with Total Frequency of the ESG Dictionary

Source: created by Svetlana V. Ratner, Marat V. Arutiunian in Python.

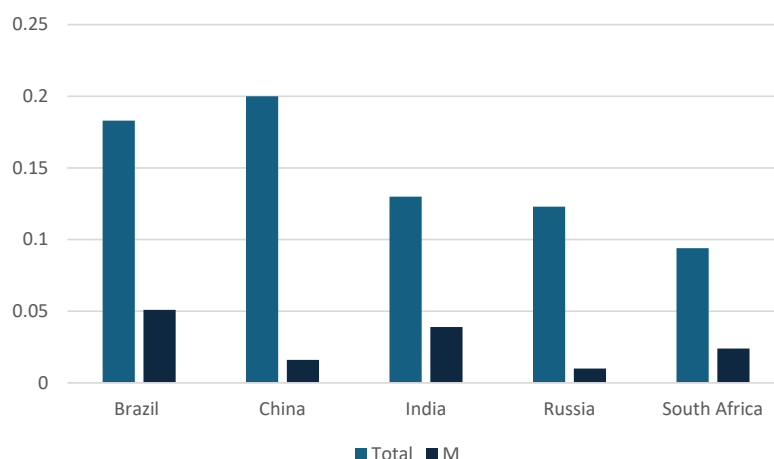


Figure 4. Term Frequency Analysis: Means for the Each Country for M-Pillar in Comparison with Total Frequency of the ESG Dictionary

Source: created by Svetlana V. Ratner, Marat V. Arutiunian in Python.

This analysis allows for an intermediate conclusion: companies in different nations exhibit distinct ESG priorities. Specifically, Russia prioritizes environmental aspects, China focuses on governance, and Brazil emphasizes analytical approaches. This suggests not only varied strategic focus but also diverse methodologies and approaches to sustainable development reporting.

Furthermore, Figures 1–4 provide insights into overall awareness and activity in sustainable development. Companies from Russia, and by extension the nation itself, demonstrate the highest levels of engagement and awareness in sustainable development issues. Brazil follows with a minor deficit. China exhibits a more substantial lag, while South Africa trails significantly. India occupies the lowest position in this assessment.

It is crucial to acknowledge that each country contributes uniquely to the achievement of sustainable development goals. Consequently, the nature of these contributions is highly likely to differ across nations, even when considering apparent variations or perceived lagging in ESG adherence rankings. This underscores the complexity and multi-faceted nature of global sustainable development efforts.

The quantitative analysis of corporate reports from the BRICS nations reveals a landscape of ESG commitment that is far from uniform. Rather than reflecting a monolithic bloc-wide approach, the findings indicate that companies in each nation prioritize different facets of the ESG agenda, likely reflecting their distinct regulatory environments, economic structures, and socio-political pressures. This heterogeneity provides empirical support for the assertions made in previous studies regarding the significant intra-bloc disparities in ESG readiness and performance [5; 7].

The pronounced focus on governance-related terminology within Chinese corporate disclosures is a particularly salient finding. This may be attributed to a state-driven emphasis on corporate structuring, risk management, and anti-corruption as foundational elements for sustainable economic expansion. For international investors, robust governance is a critical prerequisite for operating in China's complex market, compelling companies to signal their commitment

to transparency and regulatory compliance. In this context, a strong governance framework may be viewed as the initial and most critical step before a deeper engagement with environmental and social issues [15].

Conversely, the leadership of Russian companies in the frequency of environmental and social terms points to a different set of national priorities. Russia's economy is heavily reliant on natural resource extraction, making environmental impact a matter of high material risk and international scrutiny. The high frequency of 'E' terms likely reflects a corporate imperative to address and report on these core operational challenges. Similarly, the prominence of 'S' terms may be linked to the significant role of large, often state-influenced corporations in maintaining social stability, managing vast workforces, and operating in remote regions where they function as key social providers [16; 17].

The results from Brazil, which show the highest usage of methodological and analytical terms, align with literature suggesting it has one of the more advanced ESG frameworks within the BRICS bloc [18; 19]. This indicates a higher maturity in the reporting process itself, with Brazilian firms appearing to be more engaged with sophisticated concepts like dual materiality, ESG analytics, and established reporting frameworks.

South African companies, however, demonstrated the lowest overall engagement in terms of ESG term frequency. This could reflect a more fragmented and diverse corporate landscape where a unified push towards ESG integration is still in its nascent stages, lagging behind the more state-influenced or internationally-exposed corporate sectors of its BRICS counterparts [20; 21].

While this study provides valuable quantitative insights into corporate disclosure priorities, its limitations must be acknowledged. The term frequency methodology measures the volume of disclosure, not the quality of performance or the sincerity of commitment. A high frequency of terms does not preclude the possibility of *greenwashing*, where rhetoric may not be matched by substantive action. Furthermore, the analysis is confined to the top 10 largest companies in each nation, whose resources and incentives to engage in ESG reporting may not be representative of the broader economy.

Future research should aim to overcome these limitations. A longitudinal analysis could track the evolution of these national priorities over time, particularly in response to regulatory changes. Complementing the quantitative TF method with qualitative approaches, such as sentiment analysis or content analysis, could provide a more nuanced understanding of the narrative behind the numbers. Finally, future studies should seek to correlate disclosure patterns with tangible performance data (e.g., verified emissions data, employee turnover rates, and governance indices) to bridge the gap between corporate communication and real-world impact.

Conclusion

This study set out to systematically assess the ESG commitment of leading companies in the BRICS nations through a quantitative analysis of their corporate disclosures. The findings confirm the central hypothesis that ESG implementation across the bloc is highly heterogeneous, providing empirical weight to what has been widely observed in qualitative literature. Our Term Frequency analysis reveals clear and distinct national priorities: a strong focus on Environmental and Social issues in Russia, a pronounced

emphasis on Governance in China, and a sophisticated engagement with Methodology and reporting frameworks in Brazil. China and Brazil lead in overall ESG disclosure, while South Africa currently lags behind its counterparts.

It is important, however, to acknowledge the study's limitations. The methodology measures the volume of disclosure, not the quality of action, and cannot definitively rule out *greenwashing*. Furthermore, the focus on the top 10 largest companies may not be representative of the entire corporate landscape in each nation.

Therefore, this study opens several avenues for future research. A priority should be to correlate disclosure patterns with tangible performance indicators to bridge the gap between corporate rhetoric and real-world impact. Longitudinal studies are also needed to track the evolution of these ESG priorities over time, while qualitative methods could provide deeper context to the quantitative trends observed here. In conclusion, by mapping the distinct ESG priorities within BRICS, this paper offers valuable insights for stakeholders seeking to navigate and foster sustainable development in a complex and divergent global landscape.

Table A. This is a Table Caption

Company name, brief description, USD billion	Type of report, year	Source
Petrobras, Brazil's largest oil and gas company, 92.64	Sustainability report, 2023	https://petrobras.com.br/en/
Itaú Unibanco Holding, The largest financial group in Latin America, 63.72	ESG report, 2023	https://www.italu.com.br/relacoes-com-investidores/en/italu-unibanco/corporate-profile/
Banco do Brasil, Brazil's largest state-controlled bank, 30.91	ESG report, 2024	https://www.bcb.gov.br/en
Vale, Brazil's largest and one of the world's largest mining companies, 55.4	Integrated Report, 2024	https://vale.com/
Banco Bradesco, One of Brazil's largest private banks, 27.89	ESG report, 2023	https://bradescobank.com/
Banco BTG Pactual, The largest investment bank in Latin America, 78.78	Annual Report, 2023	https://www.btgpactual.com/
JBS, The world's largest meat producer, 12.66	Sustainability report, 2022	https://www.jbs.com.br/en/about/
Centrais Elétricas Brasileiras, Brazil's largest electric utility company, 18.56	Management report, 2023	https://www.gov.br/pt-br/orgaos/centrais-eletricas-brasileiras-s-a

Company name, brief description, USD billion	Type of report, year	Source
Suzano, The world's largest pulp and paper producer, 12.91	Sustainability report, 2024	https://www.suzano.com.br/en
Raízen, A large Brazilian company specializing in the production of ethanol, sugar, and electricity from sugar cane, 6	Integrated report, 2023/2024	https://www.raizen.com.br/en/sustainability/reports-and-external-agenda
Industrial and Commercial Bank of China, The largest bank in China and the world in terms of assets, 215.2	Sustainability report, 2024	https://www.icbcasia.com/ICBC/EN/
China Construction Bank, China's second largest bank, 187.5	Annual Report2024	https://www3.ccb.com/chn/home/index.shtml
Agricultural Bank of China, One of China's largest commercial banks, 170.94	Sustainability report, 2024	https://www.abchina.com/en/investor-relations/performance-reports/annual-reports/
Bank of China, One of China's largest state-owned commercial banks, 145.68	Annual Report, 2024	https://www.bank-of-china.com/en/
Petro China Company Limited, China's largest oil and gas company, 177.61	ESG report, 2024	https://www.petrochina.com.cn/ptr/
Ping An Insurance Group, Major Chinese insurance and financial services company, 105.5	Sustainability report, 2024	https://group.pingan.com/
China Merchants Bank, One of China's largest commercial banks, 127.38	ESG report, 2022	https://english.cmbchina.com/
Tencent Holdings Ltd., China's largest technology company, 472.33	ESG report2024	https://www.tencent.com/en-us/
Alibaba Group Holding Ltd., China's largest e-commerce company, 200.81	ESG report2024	https://www.alibabagroup.com/en-US
Sinopec, Major Chinese petrochemical company, 106.84	Sustainability report, 2024	http://www.sinopecgroup.com/group/en/

Company name, brief description, USD billion	Type of report, year	Source
Reliance Industries Limited, India's largest multi-industry conglomerate, 233.06	Integrated report2023/2024	https://www.ril.com/
State Bank of India (SBI), India's largest state-owned bank, 87.58	Sustainability report2023/24	https://bank.sbi/
HDFC Bank Limited, One of India's largest private banks, 133.65	Sustainability report2022/23	https://www.hdfcbank.com/?locform
Life Insurance Corporation of India (LIC), India's largest insurance company, 73.63	Annual report2023/24	https://www.licindia.in
ICICI Bank Limited, One of India's largest private banks, 95.34	ESG report2023/24	https://www.icicibank.com/
Tata Motors Limited, India's largest automobile manufacturer, 43.78	Integrated Annual report2023/24	https://www.tatamotors.com/
Axis Bank Limited, One of the largest private banks in India, 42.3	Sustainability report2022/2023	https://www.axisbank.com/
NTPC Limited, India's largest power company, 42.52	Integrated Annual report2023/24	https://ntpc.co.in/
Larsen & Toubro (L&T), India's largest diversified company, 56.91	Integrated Annual report2023/24	https://www.larsentoubro.com/
Bank of Baroda (BoB), A major Indian state-owned bank, 16.21	Sustainability report2023/24	https://www.bankofbarodauk.com/about-us/overview
First Rand Limited, One of the largest financial groups, in South Africa 21.2	Annual Integrated report2022	https://www.firstrand.co.za/
Standard Bank Group Limited, Largest banking group in Africa by assets, 17.28	Annual Integrated report2024	https://www.standardbank.com/
Naspers Limited, Large South African investment company, 38.33	Integrated Annual report2024	https://www.naspers.com/
Absa Group Limited, a South African financial services group, 7.04	Sustainability and Climate Report2024	https://www.absa.africa/

Company name, brief description, USD billion	Type of report, year	Source
Sanlam, South African Financial Group, 8.35	Sustainability Report2024	https://www.sanlam.com/
Nedbank, South African banking group, 6.09	Integrated report2023	https://personal.nedbank.co.za/ home.html
MTN Group Limited, African telecommunications company, 8.57	Sustainability Report2024	https://www.mtn.com/
Gold Fields, South African gold mining company, 14.46	Integrated Annual report2024	https://www.goldfields.com/ sustainability-reporting.php
Capitec, South African Bank, 14.47	ESG report2024	https://www.capitecbank.co.za/
Momentum Metropolitan Holdings, South African financial group, 1.62	Sustainability Report2023	https://www. momentummetropolitan.com.na/
Gazprom PJSC, Russian global energy company, 39.3	Social Impact report2023	https://www.gazprom.ru/
Lukoil, Russian multinational energy company, 57.34	Sustainability Report2023	https://lukoil.ru/
Mechel, Russian Mining and Metallurgical Company, 1.2	Sustainability Report2023	https://mechel.ru/#1
Novatek, Russian company engaged in the production, processing, and sale of natural gas, 41.23	Sustainability Report2023	https://www.novatek.ru/
Rosneft Oil Company PJSC, A major Russian oil and gas company, 55.27	Sustainability Report2023	https://www.rosneft.ru/
Sberbank, Russian financial conglomerate and the largest bank in Russia and Eastern Europe, 81	Annual report2023	www.sberbank.ru
Samolet Group of Companies, One of Russia's largest publicly traded development companies, 0.85	Annual report2023	https://samolet.ru/

Company name, brief description, USD billion	Type of report, year	Source
TCS Group Holding PLC, Russian online financial platform offering a wide range of financial services, 8.6	Sustainability Report2022	https://www.tbank.ru/
VTB Bank PJSC, One of Russia's largest universal banks, 7.2	Sustainability Report2023	https://www.vtb.ru/
Yandex, Russian multinational information technology company, 19.31	Sustainability Progress Report2023	https://yandex.ru/company

Source: compiled by Svetlana V. Ratner, Marat V. Arutiunian.

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Оценка приверженности компаний стран БРИКС принципам ESG

С.В. Ратнер  , М.В. Арутюнян 

Финансирование. Настоящее исследование не получало внешнего финансирования.

Заявление об информированном согласии: не применимо.

Вклад авторов. Концептуализация, методология, валидация, формальный анализ, написание статьи — просмотр и редактирование, научное руководство, администрирование проекта, привлечение финансирования — С.В. Ратнер. Программное обеспечение, исследование, ресурсы, курирование данных, написание статьи — подготовка первоначального варианта, визуализация — М.В. Арутюнян. Все авторы прочли и одобрили окончательную версию рукописи.

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Аннотация. Реализация принципов экологии, социальной ответственности и управления (ESG) в странах БРИКС представляет сложность из-за разнообразия социально-экономических и институциональных сред, а также преимущественно дискреционного характера отчетности. Систематический сравнительный анализ национальных приоритетов ESG в рамках блока остается недостаточно изученным. Исследование направлено на количественную оценку и сравнение уровня и характера приверженности ESG в ведущих компаниях стран БРИКС для выявления этих отличительных национальных приоритетов. Применяется методология частоты использования терминов (Term Frequency, TF) для анализа нефинансовых корпоративных отчетов 10 ведущих публичных компаний в каждой стране, отобранных по рыночной стоимости. Специализированный ESG-словарь был разработан на основе рейтингов Bloomberg и категоризирован по четырем направлениям: экологическое (E), социальное (S), корпоративное управление (G) и методологическое (M). Для расчета частоты терминов и количественной оценки фокуса раскрытия информации использовался скрипт на Python. Анализ выявил значительную неоднородность в приоритетах ESG-отчетности. Российские компании продемонстрировали наибольшую частоту использования экологических и социальных терминов, китайские — управленческих, а бразильские — методологических и аналитических. Общая вовлеченность в ESG была самой высокой в Китае, за которым следует Бразилия, в то время как Южная Африка показала самый низкий уровень раскрытия информации. Исследование подчеркивает специфику подходов к ESG в странах БРИКС.

Ключевые слова. ESG, БРИКС, анализ частоты терминов, экологическая ответственность, социальная ответственность, качество управления, методология

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POLITICAL INSTITUTIONS, PROCESSES, AND TECHNOLOGIES

Research article / Научная статья

BRICS+ Is a Strategic Platform for Cooperation Among Countries in an Unstable Global Political Environment

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Abstract. The article analyzes the opportunities and main directions for developing the BRICS+ partnership and those who wish to join, emphasizing the importance of ensuring national conditions for the balanced development of all areas of the state's life, including the economy, science, industry, education, information space, and social environment. The emerging strategic platform for cooperation should contribute to solving humanitarian issues and creating conditions for political and economic development, which will serve as an important foundation for the sustainability and prosperity of countries. This can only be achieved through the construction of a unified and indivisible security construct on the Eurasian continent.

Keywords: BRICS+, partnership, strategic cooperation, political space, and areas of life

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Introduction

The issue of development and strengthening of political stability has acquired particular significance in the context of modern challenges and conflicts. The main trends of global development in the short and medium term are associated with the transformation of the state's role, the emergence and fixation of a different set of functions and characteristics depending on the degree of globalization of a country, and the emergence of new decision-making centers in the global space that use economic, socio-cultural, and information reforms and political methods of pressure.

In the context of global geopolitical turbulence, the stability of the political space has become a determining factor in the effectiveness of economic and social transformations. The development of states is now dependent not only on natural and geographical conditions and resource potential, but also on the quality of political management, taking into account the ethnic and religious diversity of the population.

Globalization, having a negative impact on the global community, causes concerns among various social, national, and religious groups who fear losing their identity, culture, language, and religion. The increasing interdependence of the world and the emergence of global challenges and threats determine the behavior of major global and regional geostrategic political centers, among which the BRICS+ alliance plays an important role in shaping the global and regional political, economic, and social landscape.

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Materials and Methods

The need for a comprehensive approach to the BRICS member countries' strategies in various countries led to the use of interdisciplinary analysis, which revealed the multilateral interaction of international actors and the transformations of situational global processes that influence the formation of multipolarity, national interests, political consciousness, and human rights. In particular, the dialectical method provided a comprehensive approach to analyzing the components of necessary international cooperation, while the structural-functional approach allowed for the exploration of the elements of specific political interests in conjunction with the diverse possibilities for realizing these interests in the context of the variability of modern realities.

Theoretical approaches to the study of political stability in the development of global political processes (institutional theories, models of democracy) are based primarily on Western material. Based on the theory of stakeholders, we can observe the emerging trends towards strategic partnerships, which are manifested in the emergence of informal communities and political and economic institutions [1–3]. Geopolitical conflicts, social inequality, and ineffective governance create conditions for instability, undermining trust in government institutions and complicating the process of political and economic renewal.

Results and Discussion

Cooperation and Partnership Are an International Issue

The diversity of political information and factors creates a need for unifying values such as stability, order, social justice, and a strong state. These factors formed the basis for the creation of the informal BRICS group, which later became BRICS+ [4]. The 17th BRICS Summit held in Rio de Janeiro (Brazil) in July 2025 demonstrated to Western countries that the time of their *conditional dominance* was in the past. By responding proactively to the US-European aggression, Russia has given a new impetus to the development of BRICS and other associations of leaders of the global South and the global East. Cooperation with the BRICS countries is not a policy of competition, but a clearly defined course for decades to come and beyond. All attempts by Western countries and the United States to counter the ideas of justice and equality in international relations have had the opposite effect. Despite past contradictions and ideological differences, there is a growing convergence between the global South and the global East, creating a system that does not allow for the hegemony of a single country.

The main focus of the BRICS+ countries' partnership and those who wish to join is to ensure national conditions for the balanced development of all areas of the state, including the economy, science, industry, education, information space, and social environment, as cooperation contributes to solving humanitarian problems and creating conditions for economic development, which is an important foundation for the stability and prosperity of countries. This can only be achieved through the construction of a unified and indivisible security construct on the Eurasian continent. The basis of this is not the creation of a military alliance or sanctions for those who disagree, but rather the provision of support to countries that enable them to pursue business and creative endeavors. Additionally, globalization increases the dependence of regional economies on external investment and technological exchange. Limited access to international markets and financial resources can hinder economic diversification and sustainable development, while

dependence on hydrocarbon exports and uneven income distribution contribute to political instability.

The political stability of the global space is closely linked to the construction of political institutions that can unlock the economic and technological potential of each nation-state. In such circumstances, functioning political institutions become a key tool for implementing economic reforms, attracting investment, and ensuring social justice. In this context, the third international BRICS+ Fashion Summit, which took place in Moscow from August 28 to 30, became an important platform for professional communication and the development of international cooperation. The summit raised the issue of finding a balance between openness to external players and protecting the interests of national brands. The dependence on hydrocarbon exports and the uneven distribution of income were also discussed.

Western capital, which claims to be the key moderator of the inviolability of the main principles of globalization, the political elites of the West have lost the ability to assess global realities in a sober manner, and in order to achieve their own geopolitical goals, they are ready to collapse the entire system of trade and financial institutions through the disproportionate use of sanctions. However, recent events have transformed this paradigm.

The national elites and political regimes of the BRICS+ countries, as well as the ideologies they promote, act as forces of positive development that highlight the diversity of global political structures. In this context, it is important to consider the factors that limit the achievement of political and economic stability:

- External interference, including wars (Syria, Lebanon, Israel) and pressure from global powers (the United States, Russia, China, and Iran).
- Corruption, nepotism, and sanctions, which lead to an inefficient distribution of resources.
- Demographic imbalances, where young people lack opportunities for personal fulfillment.

The formation of clear, transparent, and adaptive institutions, the implementation of long-term strategic plans, the strengthening of the role of civil society, and the neutralization of external pressure can all contribute to reducing conflict levels and strengthening political regimes. The 2030 Agenda emphasizes the need to strengthen institutions, ensure access to justice, and create inclusive societies [5]. International institutions are exploring ways to unify or harmonize principles of good governance, which requires a reevaluation of approaches to political coordination, the exchange of best practices, and closer cooperation among states.

The modernization of management systems and the introduction of innovative approaches are becoming essential conditions for achieving political stability and sustainable development. Despite the apparent importance of the concept of effective public administration, there is no universally accepted definition of this term in the academic community. The differences in approaches are due to the diversity of cultural, political, and economic systems, resulting in multiple interpretations and emphases. Additionally, different linguistic and cultural traditions influence the understanding of key terms [6]. For example, the concepts of *good governance* in English and *good management* in Russian may have different connotations and associations, which requires caution in translation and interpretation. For instance, V.A. Achkasov emphasizes the need for a systematic approach to governance that takes into account the interconnectedness of political,

economic, and social factors [7]. He highlights the importance of adapting best global practices to national conditions and cultural characteristics, and notes that the effectiveness of governance depends on the harmonious interaction of political, economic, and social systems, as well as on the state's ability to adapt to changes in the external environment.

In our opinion, the models being developed should, firstly, take into account cultural and historical specifics, which is especially important for countries with a rich historical heritage and diverse traditions. Secondly, it is important to focus on the dynamic process of adapting state institutions to rapidly changing internal and external challenges, such as political conflicts, economic crises, and social transformations. Thirdly, it is essential to involve civil society and economic actors in the management process, ensuring the participation of all stakeholders in achieving sustainable development. International organizations such as the United Nations, the World Bank and the OECD offer their interpretations and criteria for the effectiveness of public administration, which contributes to the development of international standards and recommendations. However, their approaches do not always take into account national peculiarities and may require adaptation to specific conditions.

In its *dialogue* with them, the BRICS+ alliance is creating a platform for more flexible and holistic context-specific governance models that can synthesize international experience with local traditions, take into account social diversity, and respond to the challenges of globalization and regional instability. The development of such models will contribute to the strengthening of public institutions, improving their efficiency, and ultimately enhancing the political stability and quality of life for the people of the BRICS+ countries. The Rio Declaration reflected the importance and necessity of transitioning to settlements in national currencies, reforming the global governance system, developing artificial intelligence, and addressing climate change in a balanced manner, emphasizing the need for joint global efforts “to ensure the governance of artificial intelligence that supports shared values, considers risks, fosters trust, and promotes broad and inclusive international cooperation in accordance with national laws, including building the capacity of developing countries with a central role for the United Nations” [8].

In recent years, BRICS+ has shown a clear division of roles: resource suppliers like Russia, Brazil, and South Africa, and their consumers, China and India. This creates conditions for a strong economic bloc, less dependent on external factors. With the inclusion of five more states, BRICS+ has significantly increased its importance in the energy market. Saudi Arabia, the UAE, and Iran, major oil exporters, have brought its share of global production to 41% with their presence in BRICS.

Economic factors, including reliance on oil revenues and weak private sector development in some countries, limit the application of market mechanisms. However, some states (e.g., UAE) are successfully integrating New Public Management elements, aiming to diversify their economies and increase efficiency.

Vast reserves of diverse natural resources create significant potential for further economic growth of bloc countries and enhance their capabilities, including in de-dollarization. For instance, threats of tariff and sanction wars and pressure on China have strengthened Beijing's position and turned the Russia-China alliance into a crucial factor for democratizing the global system. China, despite its *world's factory* status, supports its domestic market through subsidies. Brazil, protecting

its domestic market from external pressure, imposes significant tariffs, while other countries use protectionist measures to stimulate their exports, support young industries, and increase state budget revenues. Innovations play a vital role in the development of the global digital economy, emphasized Brazil's Minister of Communications. Russia launched the first digital map of special economic zones within BRICS+. The implementation of digital solutions can contribute to increased efficiency and transparency of public services, which is particularly important in the context of sanctions.

The strength of political institutions within each Middle Eastern state, shaped by local political culture and tradition, ensures regional stability. Traditional values, religious norms, and social ties are crucial in societal life and must be considered when developing effective governance models. Middle Eastern countries, situated at the crossroads of historical paths and cultures, possess a unique environment for the development of state institutions.

Modern research expands the understanding of political stability by considering new challenges like technological changes and regional conflicts. For example, the role of social media and information technology in political mobilization has been scrutinized since the Arab Spring. Social media played a key role in organizing protests and disseminating information, impacting the political situation in several countries. In this context, Bolivia's leading state TV channel is partnering with foreign media through TV BRICS. The international media network TV BRICS is developing cooperation with BRICS partner countries and initiating information exchange with the Plurinational State of Bolivia. BOLIVIA TV, the country's leading state TV channel, is the first to join the media network.

Conclusion

Geopolitical competition, sanctions, wars (e.g., in Syria, Yemen), and chronic instability in some states limit rational governance, as the priority shifts from developing institutions and strategies to immediate regime survival measures. Countries that can flexibly leverage cultural capital, historical experience, international cooperation resources, and innovative technologies to gradually improve their institutional quality are likely to be the most successful.

Lack of transparency and limited access to statistical data complicate the measurement of governance effectiveness. In some countries, official statistics may be incomplete or deliberately distorted, especially concerning indicators related to sensitive political and economic issues. Traditional cultural and social structures, such as tribal and family ties, can conflict with formal hierarchical relationships, creating a clash between official and unofficial channels of influence. Furthermore, high levels of corruption and clientelism in some countries undermine the principles of rationality. Socio-political dynamics are often shaped by both internal and external actors, making it difficult to establish long-term strategic courses based on systemic analysis and the long-term interests of the population.

Security becomes a key component of political stability. This includes not only internal security — protection from crime and internal conflicts, but also external security — protection from external threats and ensuring territorial integrity. Control over violence and terrorism is particularly relevant for Middle Eastern

countries, where extremist groups pose a serious threat to stability and citizen security. The strengthening role of regional powers, demographic shifts, and economic transformations can lead to a redistribution of influence on the world stage. Improving practical cooperation and modifying working methods with the development of thematic agendas will contribute to the activities of BRICS+, so that the Association remains flexible, inclusive, and consensus-based.

Additionally, the next step towards ensuring security for BRICS+ countries could be the creation of a collective regional security system, whose effectiveness should be built on agreed standards of conduct and transparent dialogue for their implementation. The choice of security model depends on the participants' goals: inclusive systems are oriented towards joint security, while collective security requires the unification of states to counter external threats. In this regard, political culture, encompassing norms, values, and expectations regarding the behavior of political actors, plays an important role in shaping stable political systems, which are so important and necessary for a multipolar world.

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БРИКС+ как стратегическая платформа сотрудничества между странами в условиях нестабильной глобальной политической среды

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Аннотация. Проанализированы возможности и основные направления развития партнерства в формате БРИКС+, а также перспективы присоединения новых участников, при этом подчеркнута необходимость формирования внутренних условий для сбалансированного развития всех национальных сфер, включая экономику, науку, промышленность, образование, цифровую среду и социальный блок. Формирующаяся стратегическая платформа сотрудничества должна способствовать решению гуманитарных задач и созданию условий для политического и экономического развития, что станет важнейшей основой устойчивости и процветания стран-участниц. Достичь этого возможно лишь посредством формирования единого и неделимого конструкта безопасности на Евразийском континенте.
Ключевые слова: БРИКС+, партнерство, стратегическое сотрудничество, политическое пространство, сферы жизнедеятельности

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Research article / Научная статья

Evolution and Comparative Analysis of National Security Structures of BRICS Countries: Issues and Future Prospects for Integration

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Abstract. The growing geopolitical importance of the BRICS group, in the midst of the international liberal order's crisis, requires a thorough analysis of the basic components of the state sovereignty of its members — their National Security Systems (NSS). The aim of this study is to determine common patterns and distinctive features in the architecture and strategic directions of the NSS of Brazil, Russia, India, China, and South Africa as founding member-states of the group, with a simultaneous focus on evaluating the prospects for their unification within the framework of creating a polycentric system of international governance. The methodology for the study is founded on a systematic and comparative study of official strategic documents, legislative documents, scientific works, and statements from political elites. The study's outcomes indicate that, in spite of fundamental distinctions in political systems, all BRICS nations demonstrate a comprehensive approach towards security, with economic, energy, and informational dimensions, corresponding with their role of so-called “emerging powers” or “rising powers”. The fundamental finding is that the full institutional unification of the BRICS NSS is impossible due to fundamental distinctions in political regimes, mutually antagonistic national interests, and differing threat perceptions, corresponding with the basic assumptions of the neorealist school. Nevertheless, the study determines promising directions for limited and situational unification in the area of non-traditional threats of a security nature, such as cybersecurity, counter-terrorism, and military-technical coordination, corresponding with the logic of neoliberal institutionalism. Prospects for such interaction within BRICS do not reside within the creation of a hard alliance framework, but rather with the formation of a “flexible geometry” and network interaction on specific, non-ideologized directions for interstate interaction, corresponding with a model of “sovereignty integration” within each BRIC member's NSS.

Keywords: national security, BRICS, comparative analysis, security strategy, integration of security systems, multipolarity, geopolitics, neorealism, neoliberal institutionalism

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Introduction

The alteration of the world politics balance of power from unipolarity towards a polycentric model, which Russian scholars, such as A.D. Voskresensky, conceptualized, has provided for the increasing activity of non-Western subjects, among which the BRICS group occupies a special place [1]. Once an “economic” form, defined by Jim O'Neill as a group of rapidly developing economies [2], it has progressively turned out to be a proper platform for political and strategic consultations. As Russian President V.V. Putin stated at the 2023 BRICS summit: “BRICS is not an alliance, not a bloc, but a powerful association of states united by the aspiration for equal, mutually beneficial partnership, respect for the sovereign choice of development paths” [3]. This is confirmed by such facts as the establishment of the Contingent Reserve Arrangement [4]. In this regard, comparative analysis of the National Security Systems of the BRICS member countries is of particular scientific and practical relevance, first of all, as regards discussions on BRICS's opportunities as an emerging military-political pole as an equivalent of customary Western alliances.

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The relevance of this study is determined by the need to bridge the gap between the growing number of works devoted to the BRICS economy and the fragmentation of comprehensive comparative studies of their security systems from a political science perspective [5; 6]. Existing publications often focus on individual countries or bilateral relations (e.g., the Russia-China strategic partnership), failing to offer a holistic comparative perspective for the entire “founding five” and not addressing the practical issue of integrating these systems within a multilateral agenda.

The subject of this article is the comparative consideration of the formation and development of the current status of the NSS of BRICS nations and, on this occasion, determine the problems and future opportunities for uniting them. To accomplish this task, the following aspects are considered:

1. Analyze the regulatory framework and strategic priorities in the field of national security of each country.
2. Study the institutional setup of the NSS and mention significant variations.
3. Conclude on the opportunities and limitations for coordinating the BRICS NSS, in what directions and what formats such interaction can be performed.

Materials and Methods

The methodological foundation for the conducted research is systems approach and synthesis of comparative analysis. The systems approach, which was developed in D. Easton’s books and applied for security by B. Buzan [7; 8], allows us to address the NSS as a whole, hierarchically organized set of interconnected elements: processes and institutions. For the BRICS model, this approach functions successfully as it allows for consideration of national NSS as distinct subsystems of a forming international polycentric structure.

The comparative political method, whose foundation was laid by A. Lijphart and G. Sartori [9], allows for comparison of such factors in BRICS, revealing convergent and divergent characteristics. On this occasion, the choice of the comparison units must be taken seriously (designs of “most similar / most different systems”). The NSS of the BRICS nations represent a “different systems” type, so this design would be doubly effective for finding unifying tendencies.

The theoretical explanation of the unification problem is conducted in the frame of rival international relations theories:

- Neorealism (K. Waltz) can explain the fundamental limits on integration as well, i.e.: the anarchy of the international system, the supremacy of national over collective interests, and structural contradictions (etc.: Indo-Chinese rivalry) [10].
- Neoliberal institutionalism (R. Keohane) offers instruments for studying chances for cooperation in such sectors with correlated gains (cybersecurity, terrorism), and reveals why the creation of institutions (the BRICS Working Group on Counter-Terrorism) can reduce transactional costs and form expectations [11].
- Constructivist approach (A. Wendt) focuses on shared understandings and identities. This approach, at the BRICS level, can be presented as an effort at forming the shared “rising powers” or “civilization-states” identity, which, though, is in conflict with the influential different identities of the BRICS member-states [12].

The primary sources of information were official documents: National Security Strategy of the Russian Federation [13], National Defense White Paper of China [14], doctrinal works of India [15], National Defense Strategy of Brazil [16], and South Africa's Defense Review [17]. Content analysis of the documents identified the objects of study as follows: identification of leading concepts such as "threats," "priorities," "institutional structure," "security concept," etc. The verification and comprehensive analysis were done with the aid of peer-reviewed scientific sources, such as works of Russian, Chinese, and Indian political scientists, and reports by highly respected analytical centers.

Results and Discussion

Comparative Study of BRICS NSS: Development Towards Comprehensive Security

Analysis of the central documents of the conceptual-doctrinal sub-system of the NSS reveals that all BRICS nations have codified their concepts of security, and their development exhibits an unambiguous tendency towards shifting from the classical, exclusively military interpretation of security to a full-scale one, encompassing a vast range of threats. This development is consistent with international practice, but for BRICS nations it has a particular aspect linked with their role of so-called "centers of emerging power".

- *Russian Federation.* The National Security Strategy of the RF defines security as overall, integrative, and it includes defense, state and public security, economic development, and technological advances. Primary threats represent a military-political type, as directly specified in the document: "the activity of states aimed at undermining the sovereignty, violating the territorial integrity of the Russian Federation and its allies, including through the use of military force" [13]. They are accompanied by new threats, for example, "the use of information and communication technologies for interference in internal affairs" [13].
- *China.* The principle of "Comprehensive National Security" unites military might, economic growth, and social stability. The White Paper stresses that "China's national security covers a wide range of fields, and it is needed to balance development and security" [14]. Priorities for China are modernization of the PLA, defense of territorial integrity (Taiwan, Xinjiang, Tibet), and sea communication lines, showing the will to turn China into a "maritime power". This policy, in the opinion of A.D. Voskresensky, materializes the doctrine of "peaceful rise", in which security is used for unobstructed economic development and the export of soft power [1]. The Chinese political scientist Wang Yiwei, in his theory of a "Community with a Shared Future for Mankind" (人类命运共同体), which is often referred to by PRC leadership, advocates a perspective on security that moves beyond classical alliances. In his opinion, "the security of a single country cannot be obtained at the cost of others, and only dialogue and international cooperation can be the correct way for securing common security" [18]. This perspective directly has an impact on China's BRICS verbosity.
- *India.* Conceptual and doctrine papers [16] demonstrate a Pakistan- and China-focused perception of military threats, but energy security and counter-terrorism are also mentioned as major priorities. The Indian Armed Forces Joint Doctrine focuses on preparedness for "hybrid wars" and defence of vital infrastructure, making it closer to Russian and Chinese models [15]. In his speech at the SCO summit, Indian Prime Minister Narendra Modi highlighted the necessity of "collective efforts for combating terrorism, combating extremism

and combating radicalization” [19], which testifies to the preparedness of India for multilateral partnership for non-traditional threats within platforms such as BRICS.

- *Brazil.* National Defense Strategy prioritizes defense of sovereignty over valuable natural riches (the Amazon, oil fields on the Atlantic shelf), and against non-traditional threats (transnational crime). The paper literally declares so: “The protection of the huge natural wealth, especially in the Amazon and on the Atlantic shelf, is a national priority” [16]. This ecological and resource aspect of security is the unique feature of the Brazilian NSS, which fits with its status as an “ecological superpower” and leader of the Global South. The former President of Brazil Dilma Rousseff stated as early as 2014 that “BRICS challenges the current geopolitical architecture, which still reflects the post-war realities. We must jointly defend our interests and contribute to the creation of a more balanced world order” [20].
- *South Africa.* The South African stance, as it follows from the Defense Review, is the most highly concentrated on “human security” and the threats posed by poverty, inequality, crime, and local instability. The statement proceeds as follows: “Defence must contribute towards addressing the underlying drivers of instability, such as poverty, unemployment and social exclusion” [17]. This stance, is typical for the African environment, where the security of the state and that of its citizens can but coincide and where South Africa’s role as a stabilizer of the region is predetermined. In his words on the role of BRICS, President Cyril Ramaphosa pointed out that “the partnership should be used to address the challenges facing the Global South, including insecurity, inequality and lack of development” [21].

Institutional Structure: From Centralization Towards Pluralism

The institutional setup of the NSS (subsystems of force, means, spheres) reflects each nation’s political culture and state configuration, and this is the biggest barrier towards further integrating.

Russia and China represent strongly centralized, personalized models. In Russia, the central coordinating function belongs to the Security Council of the Russian Federation headed by the President, who is vested with constitutional powers for “forming and directing the Security Council” (Art. 83 of the Russian Constitution). In China, unabridged leadership is vested in the National Security Commission of the CPC Central Committee under the control of the General Secretary of the CPC Central Committee, which codifies the principle of “the Party commanding the gun” [14]. This model, characterized as vertically integrated, centralizes strategic planning and operational control within a narrow circle of decision-makers, enabling rapid response but increasing the risk of over-personalization. Chinese scholar Yan Xuetong from Tsinghua University describes this model as a “strategy of holistic national security” (总体国家安全观), with the party playing an integrating function, making the system effective but hard to harmonize with liberal models [22].

India, Brazil, and South Africa, as democracies, possess multi-sided and diversified systems with separation of powers from the executive (president, prime minister), security councils (India’s National Security Council, Brazil’s Defense Council), and parliamentary committees with oversight roles. This results in a “horizontally distributed” model that functions less effectively in crisis but is more transparent (Table).

Comparative Features of BRICS States' National Security Systems

Country	Key document	Decision-making center	Key threats	Governance model
Russia	National Security Strategy [13]	Security Council (President)	NATO actions, threats to sovereignty, cyberattacks	Vertically Integrated
China	National Defense White Paper [14]	National Security Commission of the CPC Central Committee (NSC CPC CC)	Separatism, protection of sea lanes, ensuring growth	Vertically Integrated
India	Military Doctrine [15]	Prime Minister, National Security Council	Terrorism, regional rivals, border security	Horizontally Distributed
Brazil	National Defence Strategy [16]	President, Defense Council	Organized crime, protection of Amazon resources	Horizontally Distributed
South Africa	Defence Review [17]	President, Government	Poverty, inequality, crime, instability in Africa	Horizontally Distributed

Source: compiled by Leonid G. Abdrakhimov.

Issues and Prospects of BRICS NSS Integration Theoretical Explanation

The conducted analysis allows estimating the possibility of integrating the BRICS NSS since it is characterized as the acquisition of the capability for joint activity, information exchange, and coordination of actions. The conclusion is that full-scale and comprehensive integration in the short and medium terms is unlikely but that partial and situational integration on single directions is possible and promising.

Primary Issue and Restriction for Integration (Neorealist Approach):

1. **Profound Variation in Political Regimes.** The Russian and Chinese centralized NSS models, which integrate security with the stability of the political regime, are weakly compatible at the institutional and ideological levels with the distributed Indian, Brazilian, and South African systems. The strategic convergence of Moscow and Beijing is based on shared authoritarianism and confrontation with the West, which does not find full resonance in Delhi, Brasília, or Pretoria. From the neorealist perspective, such a variation in “state types” leads to a non-overcomeable barrier of trust.
2. **Conflicting National Interests.** The strategic competition between China and India, such as over borders and in the Indian Ocean, is a systemic limitation on any intense military-political interaction within BRICS. This animosity, as K. Waltz put it, is a quintessential illustration of the “security dilemma” in anarchy [10]. The mantra of multipolarity can't defeat the structural contradiction between the two giants of Asia.
3. **Divergence in Perceptions of Threats.** Security issues that are of concern for Russia (NATO) or China (separatism) do not take centre stage for Brazil or South Africa, and this results in divergent setting of priorities. Security threats for South Africa, as C. Alden and M. Schoeman observes, “are mostly internal and continental in nature, and not globally adversarial” [23]. This supports neorealist argument of paramountcy of national interest.

4. Lack of Shared Identity and Enemy. BRICS is not a value-based defense alliance with an identified enemy, as it is with NATO, and the motivation for cohesion is thus situational and pragmatic [5]. The constructivist account is in the weakness: that a shared “we-identity” at both the elite and societal levels within the BRICS countries is [12].

Prospects for Low-Level Integration (NeoLiberal-Institutionalist Approach):

1. Sphere of Non-Traditional Security Challenges. This area offers the greatest potential for convergence over divergence with its features. In the eyes of neoliberal institutionalism, it is in such “technical” realms that cooperation is at its highest likelihood, as it entails mutual gains (absolute gains) at a negligible political cost [11].

- Cybersecurity: Adopting collective stands on internet governance as an alternate model, establishing mechanisms for communication on cyberattacks. State sovereignty in the cyber space is retained by each of the BRICS nations.
- Counter-Terrorism and Transnational Organized Crime: Promoting global cooperation on terrorism and crime through working groups like the BRICS Working Group on Counter-Terrorism. It is the functional working groups that become the ‘growth points’ of practical BRICS cooperation in the security sphere.
- Energy and Food Security: Coordination for stabilizing world markets, which is equal to the economic interests of all members.

2. Military-Technical Cooperation and Tactical, Operational, and Strategic Interoperability.

- Joint Exercises: Executing exercises training interaction at the tactical level (such as search and rescue operations, anti-piracy), without setting up a single strategic command. The “MIR” emergency response exercises constitute a successful example.
- Standardization of Armaments: Joint procurement and production of weapons systems (such as Russian-Indian collaborations such as BRAHMOS). The formula represents a platform for the diffusion of technologies and standards and not for any further political unification.

3. Strategic Dialogue and Crisis Management.

- Formation of fixed consultative mechanisms (security council secretaries’ and defense ministers’ meetings) for exchanging estimations and evading escalation, with special relevance on the backdrop of Indo-Chinese contradictions. This type of dialogue fosters the formation of common “rules of the game”.

Therefore, the model towards which BRICS is naturally evolving is not the “integration of systems” (NSS) by similarity with classical coalitions, but “networking” on selective, de-ideologized agendas [5; 24]. This “variable geometry”, or, applying A.D. Voskresensky’s term, “integration of sovereignty”, enables cooperation where there is coincidence of interest and upholds sovereignty where they do not coincide, with no need for radical political convergence [1]. Chinese analyst Liu Ziq from the China Institute of International Studies (CIIS) defines this as “pragmatic functionalism”, whereby cooperation emerges from below, from discrete projects up to future coordination on a deeper plane, evading ideological divergences.

The findings and their interpretations from the perspective of previous studies and working hypotheses need to be provided by the authors themselves. The findings

and what they signify need to be provided in as broad a frame as feasible. The future directions for research may also be provided.

Conclusion

This book has allowed for a comprehensive comparative analysis of BRICS NSS and a study of their integration prospects within the context of opposing theoretical paradigms.

1. A shared pattern for each of the five nations is the development towards a total security model that engages the military, economic, and societal realms. This provides a shared conceptual foundation for argument but does not eliminate underlying distinctions.
2. The crucial difference that opposes deeper integration is the institutional design: from highly centralized, “vertically integrated” variants in Russia and China to multi-centered, “horizontally distributed” systems in India, Brazil, and South Africa. The difference is a symptom of a deeper separation between authoritarian and democratic political cultures.
3. The shared features provide grounds for communication; on the other hand, divergent features, and first of all, conflicting Indian and Chinese interests, represent the essence of fundamentals and constrain the degree of integration, which is explained within the neorealist school with evident success. BRICS is and continues to be a “coalition of interests”, rather than a “coalition of values”.
4. The unification opportunities, framed within the neoliberal institutionalist perspective, do not lie in creating a single military-political bloc, but rather in developing pragmatic network interaction within areas such as cybersecurity, counter-terrorism, and military-technical cooperation. The success will be dependent on the ability of BRICS member countries to delineate separate sectors of cooperation from strategic divergences and develop working institutions.

Other projects can pertain to the evaluation of the efficiency of current mechanisms of interaction within BRICS (such as the Working Group on Counter-Terrorism), and the consideration of the effect of the expansion of the association (new entry of States such as Iran, Saudi Arabia, UAE) on the priorities and security cooperation dynamics. Empirical confirmation of the thesis on “sovereignty integration” with the support of selected case studies on cooperation is of special interest.

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Эволюция и сравнительный анализ национальных систем безопасности стран БРИКС: проблемы и перспективы интеграции

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Аннотация. Возрастающее геополитическое значение объединения БРИКС на фоне кризиса либерального международного порядка требует тщательного анализа базовых компонентов государственного суверенитета его участников — их национальных систем безопасности (СНБ). Цель — выявить общие закономерности и отличительные особенности архитектуры и стратегических ориентиров СНБ стран — основательниц объединения (Бразилии, России, Индии, Китая и ЮАР), а также оценить перспективы их унификации в рамках формирования полицентричной системы международного управления. Методология исследования базируется на системном и сравнительном анализе официальных стратегических документов, законодательных актов, научных работ и заявлений политических элит. Результаты показывают, что, несмотря на фундаментальные различия в политических системах, все страны БРИКС демонстрируют комплексный подход к вопросам безопасности, включающий экономическое, энергетическое и информационное измерения, что соответствует их роли так называемых «новых центров силы» или «восходящих держав». Ключевой вывод исследования заключается в том, что полная институциональная унификация СНБ стран БРИКС невозможна из-за принципиальных различий политических режимов, взаимно противоречивых национальных интересов и различного восприятия угроз, что соотносится с базовыми положениями неореалистской школы. Тем не менее определяются перспективные направления ограниченной и ситуативной унификации в сфере нетрадиционных угроз безопасности, таких как кибербезопасность, противодействие терроризму и военно-техническое сотрудничество, что соответствует логике неолиберального институционализма. Перспективы подобного взаимодействия в рамках БРИКС заключаются не в создании жесткой союзной структуры, а в формировании «гибкой геометрии» и сетевого взаимодействия по конкретным, неидеологизированным направлениям межгосударственного сотрудничества, что соответствует модели «интеграция суверенитетов» в национальных системах безопасности стран — участников БРИКС. **Ключевые слова:** национальная безопасность, БРИКС, сравнительный анализ, стратегия безопасности, интеграция систем безопасности, многополярность, геополитика, неореализм, неолиберальный институционализм. **Ключевые слова:** национальная безопасность, БРИКС, сравнительный анализ, стратегия безопасности, интеграция систем безопасности, многополярность, геополитика, неореализм, неолиберальный институционализм

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Research article / Научная статья

BRICS in Latin America: Opportunities and Constraints of Cooperation

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Abstract. The article examines the prospects and challenges associated with the potential expansion of BRICS in the Latin American region. The research is based on the application of PESTLE and SWOT analytical frameworks, which make it possible to structure the factors of interaction and provide a systematic assessment of its dynamics. The paper consistently examines the key determinants of this process. The political context is shaped by the counteraction of the United States, the intra-regional dynamics of the “pink tide,” and Brazil’s role as a regional leader within the bloc. Economic factors — such as the complementarity of national economies, access to investments from the New Development Bank, and opportunities to enter new markets — serve as the main incentives for Latin American countries. In addition, the study highlights the influence of social factors, particularly the pro-Western orientation of regional states, as well as the importance of technological cooperation and legal aspects related to the informal status of BRICS. The authors identify the strengths (economic potential, ideological appeal) and opportunities (amplification of the “Global South” voice, implementation of infrastructure projects) that foster closer cooperation. At the same time, the paper outlines the weaknesses (institutional amorphousness, internal contradictions) and threats (external geopolitical pressure, regional instability) that constrain the integration of Latin American countries into the BRICS framework. In conclusion, the authors argue that the most sustainable form of engagement could be the “BRICS+” model, which envisages expanding the circle of dialogue partners without granting full membership. This approach would make it possible to minimize risks and strengthen the position of the association in the global system.

Keywords: BRICS, BRICS expansion, Latin America, BRICS+, Brazil

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Introduction

Founded in 2009, the BRICS grouping was initially conceived as an association of emerging economies with significant influence on global development. Annual meetings of BRICS leaders and representatives at various levels, the establishment of the first institutions, and the expansion of multilateral projects have led to the formation of one of the most visible and widely discussed actors in contemporary global political processes. Originally comprising four member states, BRICS today includes ten full members and thirteen partner countries that have joined the BRICS+ framework, creating a space for a “polyphonic international dialogue” [1].

Despite the diversity among its member states, BRICS continues to evolve, drawing new partners into its orbit of cooperation. Recently, particular attention has been paid to the potential expansion of BRICS membership and partnerships in the Latin American region. The situation surrounding Argentina’s refusal to join the association, the inclusion of Cuba and Bolivia as partner countries, the expressed interest of other states such as Venezuela and Nicaragua, and the emergence of scholarly research on the potential accession of Latin American countries to BRICS [2] have further highlighted the relevance of this issue.

This article examines the challenges and prospects of BRICS cooperation with Latin American countries.

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The analytical framework is structured through the application of PESTLE and SWOT methodologies. The PESTLE approach is employed to identify political, economic, social, technological, legal, and international factors influencing the interaction, while the SWOT analysis serves to summarize and systematize the prospects for the development of relations, taking into account existing strengths and weaknesses, as well as potential and current threats and opportunities.

Results and Discussion

Key Factors Shaping BRICS – Latin American Cooperation

The foreign policy environment largely determines the prospects for Latin American integration into BRICS. The key international political factor is the position of the United States, which is concerned about the growing influence of China and Russia in the Western Hemisphere [3], as well as about the overall strengthening of BRICS. In response, within the framework of the G7, the United States announced its own infrastructure investment programs – Build Back Better World [4], later transformed into the Partnership for Global Infrastructure and Investment. Although these initiatives currently lack sufficient financial backing, their primary political objective is to demonstrate to Latin American countries that they have an alternative and the support of the West.

Another important political factor is the intra-regional dynamics of Latin America. In recent years, the region has experienced a so-called “pink tide” [5]—the rise to power of left-centrist governments (in Mexico, Argentina until 2023, Bolivia, Chile, Colombia, and Brazil), many of which are sympathetic to the ideas of multipolarity and South–South integration. These governments view BRICS member states as natural partners sharing the values of sovereign development [6].

However, the political pendulum in the region is well known for its swings: a change of government can fundamentally alter the country’s foreign policy course. A vivid example is Argentina, where the previous left-centrist administration applied for BRICS membership, but its right-liberal successor, Javier Milei, who favors closer ties with the United States, withdrew the application.

Therefore, policy continuity remains a crucial factor: for successful integration into BRICS, regional countries must achieve an internal political consensus on this issue, ensuring that changes in government do not lead to abrupt foreign policy reversals. Otherwise, the reliability of Latin American partners will continue to be questioned.

Another important factor concerns the position of the leading BRICS countries regarding the role of Latin American states within the association and within their broader foreign policy strategies. China has consistently supported the expansion of engagement with the region, while Russia has a long-standing history of cooperation with Latin American states, even though the region still largely remains on the periphery of Russia’s foreign policy agenda. Brazil, as both a BRICS member and a regional leader, seeks to act as a representative of the entire region. This means that, politically, the selection of “candidate” countries for partnership will be filtered both by extra-regional powers and by the considerations of the regional hegemon.

Economic pragmatism and perceived benefits constitute the main driving force behind BRICS expansion for Latin American countries. On the one hand, there is

an observable objective convergence of economies: over the past decade, China has become the largest trading partner of South America [7]. At the same time, the countries of the region are interested in attracting foreign direct investment and credit flows from other BRICS members. The New Development Bank (NDB) of BRICS has announced its plans to admit new members and to finance projects beyond the founding countries [8]. For Latin American economies, participation in the association could provide access to substantial financial resources and investment opportunities.

In addition, an important factor remains the potential access to new markets and participation in large-scale interregional projects. Latin America is rich in natural resources — oil, lithium, copper, agricultural and industrial products — all of which are in high demand among BRICS countries characterized by high resource intensity. The integration of logistics chains (for instance, the supply of Bolivian lithium for Chinese industry with the assistance of the BRICS New Development Bank) would generate mutual benefits for the participants, with BRICS serving as an important negotiation platform for such projects.

Overall, economic factors are largely favorable to the expansion of BRICS: the complementarity of national economies, the region's demand for investment, its potential as a market for BRICS exports, and the emergence of alternative financial instruments all provide a solid foundation for closer cooperation. The key question, however, is whether the countries will be able to make effective use of the opportunities provided and to minimize the associated risks.

The socio-cultural environment and public opinion also influence the prospects for BRICS expansion in the region. Historically, anti-interventionist and anti-imperialist sentiments have been strong in Latin America, shaping broad support for an independent foreign policy course. On this basis, cooperation with the countries of the Global South may receive public approval — particularly in states where disappointment with traditional cooperation under international financial institutions remains high (such as Venezuela, Argentina, Peru, and Ecuador).

At the same time, social factors may also play a constraining role. A significant portion of the population and elites in Latin America maintain close cultural and educational ties with Europe and North America and are oriented toward Western values and discourses. For them, an alliance with BRICS members — often portrayed, as a result of effective Western public diplomacy, as an “anti-Western” bloc adhering to alternative values [9]—may appear undesirable. In the region, the decision to join BRICS could potentially become the subject of broad public debate. In Argentina, for instance, the announcement of the country's invitation to BRICS triggered discussion: while some political forces and experts emphasized potential economic benefits, others warned of the risks of isolation from the West and excessive dependence on China. Although the debate was curtailed by the change of government, this episode illustrates the significance of social perception as a factor influencing integration dynamics.

Another social aspect concerns the presence of large diasporas and enduring connections between Latin America and BRICS countries. The Chinese diaspora, for example, is substantial in Peru; Cubans maintain long-standing ties with Russia; and Indian communities are present in Guyana and Brazil. These networks can serve as “bridges” of mutual understanding, facilitating exchange and cooperation. At the same time, linguistic barriers and cultural distance between Latin America and other BRICS states remain objective factors that may slow the establishment of closer formal and informal contacts.

Public support for integration will to a large extent depend on tangible outcomes: if societies perceive improvements in the economic situation, job creation, and new opportunities for growth resulting from cooperation with BRICS, attitudes are likely to become more favorable.

Scientific and technological development, along with digital infrastructure, constitutes an important dimension shaping the potential for cooperation with BRICS. The BRICS countries — particularly China, India, and Russia — possess advanced technologies in a wide range of fields, from space exploration and nuclear energy to information technology and biopharmaceuticals. For Latin American states, this opens opportunities for technological exchange and joint innovation. There are already successful examples: since the 1980s, Brazil and China have been jointly developing remote-sensing satellites under the CBERS program, which is now supported by the BRICS Committee on Space Cooperation. Established in May 2022, this committee has become a new platform for deepened interaction among member states in this field.

In recent years, issues related to the digital economy and artificial intelligence have become increasingly prominent on the BRICS agenda. By integrating into these initiatives, Latin American countries can gain access to both expertise and investment in their technological sectors.

The legal environment and regulatory framework also determine the boundaries and modalities of cooperation with BRICS. Since BRICS is an informal association without a founding treaty [10], accession does not require the ratification of an international agreement. This simplifies the expansion process: a political decision at the highest level is sufficient to admit a new member. At the same time, the absence of a clearly defined legal status means that the juridical nature of obligations among participants remains ambiguous. Within BRICS, memoranda of understanding and “roadmaps” are signed, but they are largely declarative and framework in nature. The expansion of membership may further dilute consensus, increase internal fragmentation within BRICS, and foster the emergence of interest-based coalitions.

Although there are no direct legal contradictions between BRICS membership and other international commitments, the issue remains diplomatically sensitive. The legal factor also concerns the characteristics of national legislation in Latin American countries related to foreign investment, banking regulation, and trade regimes. If BRICS, through the New Development Bank (NDB), finances projects in Latin America, it is essential that the host countries ensure transparent regulatory frameworks for the operation of international financial institutions. Sanctions regimes may also play a role: by joining a bloc that includes Russia and Iran, Latin American states would need to maneuver carefully to avoid the risk of secondary sanctions.

Another legal aspect is the principle of sovereign equality and non-interference, which is embedded in the ideological foundation of BRICS [11]. This principle is of crucial importance, as Latin American countries traditionally attach great value to sovereignty and the inviolability of borders.

A further legal dimension involves the development of new agreements within an expanded BRICS framework. Should the number of participants grow, the question may arise of granting the organization a more formalized status — such as adopting a BRICS+ Charter that would articulate its goals, principles, and institutional mechanisms. This could mark a new juridical stage in BRICS evolution, although member states’ readiness for such a step remains uncertain. For now, the legal environment for expansion appears flexible, yet it requires

the adaptation of both domestic and external regulatory norms by prospective candidate countries.

Prospects and Challenges of BRICS Expansion in the Latin American Region

This section of the article is based on the application of SWOT analysis, which enables the assessment of prospects for cooperation through the systematization of the strengths and weaknesses of interaction, as well as its opportunities and threats.

Regarding the strengths, first and foremost, BRICS possesses significant economic potential and accumulated experience in multifaceted cooperation, which may prove attractive to Latin American economies. The member countries jointly account for approximately 36% of global GDP and 18% of world trade [12], and they possess substantial financial resources, human capital, and technological capabilities. Within BRICS, the New Development Bank (NDB) has been established to finance infrastructure and other development projects in member and partner countries. For Latin American states, which currently face an investment deficit, access to such alternative sources of capital constitutes a major advantage.

Beyond economic considerations, another important incentive for some Latin American countries is the potential for military-political and technological cooperation with BRICS members. For Russia, amid confrontation with the West, Latin America represents an important vector of foreign policy, allowing it to demonstrate global presence. In turn, certain regional governments that maintain strained relations with the United States view partnership with BRICS as an opportunity to diversify sources of arms supplies and strengthen their defense capabilities. In this sense, BRICS serves as an additional platform for dialogue with key partners on security-related issues.

Secondly, the presence of Brazil, which seeks to play the role of a regional representative within the association, has a positive demonstrative effect on its neighbors. In 2025, the BRICS chairmanship passed to Latin America, with Brazil assuming the leading role. The country continued to advance its own agenda — one that also reflects the interests of other regional states — including the fight against poverty, the reform of the international monetary and financial system, and the transformation of global governance institutions [13].

Thirdly, the ideological appeal of the BRICS format for a number of Latin American elites lies in its image as a “club of developing countries”, where the principles of sovereign equality and non-interference prevail. This is reinforced by the rhetoric of BRICS leaders themselves, who position the association as a platform for developing a common stance of emerging economies — the countries of the Global South or the so-called “world majority” — on the reform of global institutions.

Moreover, the positive experience of cooperation between Latin American states and individual BRICS members contributes to the growing interest in the grouping. This applies to economic, political, and humanitarian dimensions alike. For instance, studies have shown that among the “original five” BRICS countries, all — except South Africa — are actively engaged in Latin America, implementing humanitarian projects with the majority of states in the region [14].

As for the weaknesses, the main challenge of BRICS expansion lies in the absence of consensus among member states regarding the development of a unified

foreign policy strategy and the institutional structure of the association itself. The BRICS countries are highly heterogeneous in their interests; there is no common ideological platform or long-term development strategy for the bloc, which diminishes its overall effectiveness. Each state tends to use BRICS primarily as a discussion platform for advancing its own agenda.

Moreover, BRICS is not an integration-based organization: decisions are made by consensus during the annual summits, but they remain advisory in nature. The lack of institutionalization means that many agreements reached within BRICS remain largely rhetorical. Although this flexibility can be seen as a formal advantage — allowing the format to adapt to changing circumstances — it simultaneously limits the bloc's effectiveness in the eyes of external partners.

An important aspect in this context is the potential competition of interests and the possible reduction in the role of individual members following expansion. For example, Brazil's exclusive position as the sole representative of the region within BRICS previously ensured it a special status; the accession of other Latin American states could weaken Brazil's unique role.

In addition, political disagreements have emerged among BRICS members regarding the pool of potential partners in Latin America. There is no unified view on which states should be invited. A well-known case occurred when Brazil effectively blocked a proposal to invite Venezuela to join the BRICS partnership due to political differences [15].

At the same time, the expansion of BRICS in Latin America opens up a number of opportunities that could strengthen both the association itself and its potential participants.

First, it provides for the deepening of interregional South–South cooperation. The growing global influence of BRICS enhances its authority in advancing and defending the common interests of its members [16]. Latin America's representation in major international forums through several countries would increase the region's weight in shaping the global agenda.

Second, the BRICS+ format has the potential to become a platform for the implementation of large-scale infrastructure projects [17] linking Latin America with Africa and Asia. Within the framework of the Belt and Road Initiative, China already cooperates with many countries of the region—21 out of 33 Latin American states have signed memoranda of cooperation — and through BRICS these projects could acquire a multilateral dimension and financing. For instance, Bolivia, having become a BRICS partner, seeks to consolidate its position as a key player in the lithium market by attracting investment from BRICS countries for the development of its vast lithium deposits [18].

Third, the growing participation of Latin American countries in BRICS could stimulate the reform of the global governance system [19]. The collective voice of an expanded BRICS has the potential to exert greater influence on the reform of the IMF, the World Bank, and the UN Security Council [20], promoting fairer representation for developing countries. From its inception, BRICS has sought to foster international cooperation based on the principles of transparency, mutual respect, and multipolarity.

However, the process of BRICS expansion in Latin America also faces significant external threats and risks.

First, geopolitical resistance from the United States and its allies may hinder the involvement of Latin American countries in BRICS. U.S. officials have described the enlargement of the association as “a significant victory for two leading members of the group, increasing China’s political influence and helping to reduce Russia’s isolation” [21]. Joining a format that is increasingly perceived in the West as an “anti-Western alliance” could complicate the relations of these Latin American states with Europe and North America.

Second, the admission of new members with divergent interests could exacerbate internal contradictions and reduce the effectiveness of BRICS, calling into question the rationale for its enlargement.

Third, regional political divisions in Latin America also pose a threat to BRICS expansion. Competition for leadership among the region’s key countries — Brazil, Mexico, and Argentina — or their ideological incompatibilities may hinder the formation of a consolidated regional position toward cooperation with BRICS.

Today, BRICS functions as an influential transregional platform for international dialogue [22] and collective decision-making, addressing not only joint projects but also broader issues of global governance. Although the association was initially established as a dialogue forum primarily focused on economic and financial cooperation, it has gradually evolved into a multidimensional framework. BRICS now regularly engages in social and humanitarian initiatives, such as the establishment of the BRICS Network University, the BRICS Youth Council, and the BRICS Games, among others.

At present, BRICS interacts with Latin American countries across various domains, expanding cooperation formats and demonstrating the association’s capacity to formulate collective responses to global challenges. The enlargement of BRICS during 2022–2025 reflects the growing international interest in the grouping, including from Latin American states. However, the expansion also entails not only positive outcomes but potential drawbacks that may, in turn, become destabilizing factors for the association’s functioning.

Conclusion

It appears that the most effective and sustainable solution lies in the further development of the BRICS+ dialogue format. Rather than increasing the number of full BRICS members, expanding the circle of dialogue partners within the informal transregional BRICS+ framework could: reduce the likelihood of internal contradictions; prevent the emergence of interest-based coalitions and the resulting difficulty in reaching consensus; minimize reputational risks — such as those exemplified by Argentina’s withdrawal from participation; and strengthen BRICS’s global positioning and image, ensuring the association’s stable “in-depth” development while enhancing its soft power potential.

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БРИКС в Латинской Америке: потенциал и пределы сотрудничества

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Финансирование. Настоящее исследование не получало внешнего финансирования.

Заявление об информированном согласии: не применимо.

Вклад авторов. Концептуализация, методология, предоставление ресурсов, написание первоначального варианта текста, рецензирование и редактирование – Д.А. Кузнецов, А.С. Укконен. Все авторы прочли и одобрили окончательную версию рукописи.

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Аннотация. Проанализированы перспективы и вызовы, связанные с потенциальным расширением БРИКС в латиноамериканском регионе. Исследование базируется на применении аналитических инструментов PESTLE и SWOT, что позволяет структурировать факторы взаимодействия и дать системную оценку их динамики. Последовательно рассматриваются ключевые детерминанты этого процесса. Политический контекст определяется противодействием США, внутрирегиональной динамикой «розовой волны» и позицией Бразилии как регионального лидера внутри блока. Экономические факторы, такие как взаимодополняемость экономик, доступ к инвестициям Нового банка развития и возможности выхода на новые рынки, выступают главным стимулом для латиноамериканских государств. Кроме того, отмечается влияние социальных факторов, в частности прозападной ориентации стран региона, а также роль технологического сотрудничества и правовых аспектов, связанных с неформальным статусом БРИКС. Выявлены сильные стороны (экономический потенциал, идеологическая привлекательность) и возможности (усиление голоса Глобального Юга, реализация инфраструктурных проектов), которые способствуют сближению государств. В то же время обозначены слабые стороны (институциональная аморфность, внутренние противоречия) и угрозы (внешнее геополитическое давление, региональная нестабильность), ограничивающие интеграцию латиноамериканских стран в структуру БРИКС. В заключении авторы приходят к выводу, что наиболее устойчивой формой взаимодействия может стать модель БРИКС+, предполагающая расширение круга партнеров по диалогу без полноправного членства, что позволит минимизировать риски и укрепить позиции объединения.

Ключевые слова: БРИКС, расширение БРИКС, Латинская Америка, БРИКС+, Бразилия

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Russia–China Cooperation in the Arctic: A Pathway to Technological Sovereignty

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Abstract. This article examines Russian–Chinese cooperation in the Arctic, with the primary objective of assessing its role in advancing technological sovereignty and safeguarding the national interests of both states. It reviews domestic scholarly perspectives in Russia and China on sovereignty challenges and strategic threats, and explores bilateral mechanisms for mitigating these risks. The study also analyzes the implementation of current and recently updated Arctic strategies of both nations. The findings indicate that while Russia and China maintain distinct national priorities, their strategic interests largely converge, thereby strengthening the potential for sustained bilateral cooperation in the Arctic region.

Keywords: Arctic, Russia, China, cooperation, sovereignty

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Introduction

In the context of a changing global world system, in the context of the collapse of the “Pax Americana”, a system of a unipolar world in which the United States claims world domination, all mankind comes to a situation where old rules, norms, international law, international organizations cease to operate, and new ones are still being formed. The global dominance of the United States and its satellites in the G7, NATO, the European Union, and the Commonwealth of Nations is weakening and losing its influence, and new entities based on the principles of equality and partnership, such as BRICS+ and the SCO, are only beginning to strengthen their positions[1].

In such circumstances, even the world's largest countries have to defend their sovereignty and national interests.

China's technological sovereignty is heavily dependent on global trade. China is the world's largest exporter of technological products and at the same time the largest consumer of natural resources.

To a large extent, China's technological sovereignty depends on the stability and security of international trade routes. But global trade has recently become more and more dangerous, especially shipping. In the 2020s, there were cases of the Suez Canal being blocked, and Somali pirates periodically threaten to attack merchant ships. The year 2025 became especially tense, the Yemeni Houthis periodically blocked traffic in the Persian Gulf, and the war between Israel and the United States with Iran, although it took several days, blocked air transport in the Middle East and threatened to block maritime traffic through the Strait of Hormuz. In addition, there have been cases of piracy by the fleets of the United States and European countries against ships of neutral countries.

China needs a safe route that minimizes the threat of transportation, such as a railway route through Russia and Central Asian countries, or the Northern Sea Route through the Arctic.

On the other hand, Russia is also under unprecedented political pressure from the countries of the “Collective West”.

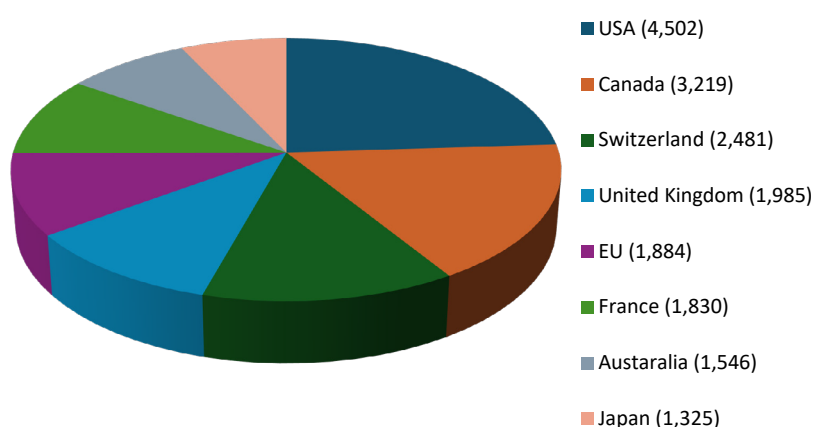
Currently, 16,077 sanctions have been imposed on Russian individuals and legal entities, which is almost six times more than before February 22, 2022 (Table 1).

Table 1. Ranking of Countries by the Number of Western Sanctions

Rating	Country	Sanctions before February 2022	Sanctions after February 2022
1	Russia	2695	16077
2	Iran	3616	1377
3	Syria	2598	313
4	NORTH KOREA	2052	119
5	Belarus	788	666
6	Venezuela	651	96
7	Myanmar	458	530

Source: compiled by Sergei B. Zainullin, Shuang Lei based on data from S.B. Zainullin, O.A. Zainullina [2].

The leaders of the current round of sanctions against Russia are the United States, Canada, Switzerland and the United Kingdom with 3,551, 2,765, 2,225 and 1,749 restrictions, respectively (Figure).



Sanctions by Issue Countries

These statistics allow us to conclude that Russia has become the main target of sanctions and sanctions against Russia have been imposed precisely by the largest countries of the “Collective West”. The introduction of a record number of sanctions increases the relevance of technological security more and more. Taking into account the increasing level of cooperation between Russia and China. The Arctic can become one of the key platforms for joint efforts to ensure the sovereignty of friendly countries.

Materials and Methods

This article uses such research methods as a review of monographs and scientific articles by Russian and Chinese scientists, analysis of statistical data, and study of strategic documents of the Russian Federation and the People's Republic of China on cooperation in the Arctic region. Generative artificial intelligence (GenAI) has not been used in this paper.

Results and Discussion

Development of Russia's Arctic Strategy

The Arctic is of key importance for Russia's resource supply. A significant part of Russia's natural resources is located in the Arctic zone (Table 2).

Table 2. A significant Part of Russia's Natural Resources Is Located in the Arctic Zone

Resource	Reserves, %	Production, %
Platinoids	95	99
Nickel	74	100
Cobalt	55	92
Apatite ores	67	99
Rare earth metals	61	100
Bauxite	14	64
Gas	~80 years	~83 years
Oil	~130 years	~10 years

Source: compiled by Sergei B. Zainullin, Shuang Lei.

As a result of the implementation of the Strategy for the Development of the Arctic zone of the Russian Federation and ensuring National Security for the period up to 2020:

- Life expectancy at birth in the Arctic zone increased from 70.65 years in 2014 to 72.39 years.
- The migration outflow of the population from the Arctic zone has decreased by 53 percent since 2014.
- The unemployment rate (according to the methodology of the International Labor Organization) decreased from 5.6 percent in 2017 to 4.6 percent in 2019.
- The share of the gross regional product produced in the Arctic zone in the total gross regional product of the subjects of the Russian Federation increased from 5 percent in 2014 to 6.2 percent.
- The share of funds from the budgets of the budgetary system of the Russian Federation in the total volume of investments in fixed assets carried out in the Arctic zone increased from 5.5 percent in 2014 to 7.6 percent in 2019.
- The volume of cargo transportation in the waters of the Northern Sea Route increased from 4 million tons in 2014 to 31.5 million tons in 2019.
- The share of households with broadband access to the Internet information and telecommunications network in the total number of such households in the Arctic zone increased from 73.9 percent in 2016 to 81.3 percent in 2019.
- The share of modern weapons, military and special equipment in the Arctic zone increased from 41 percent in 2014 to 59 percent in 2019.

It can be concluded that the implementation of Russia's previous Arctic Strategy has led to positive results, but the Arctic needs further infrastructure development.

Decree of the President of the Russian Federation No. 645 dated October 26, 2020 On the Strategy for the Development of the Arctic zone of the Russian Federation and Ensuring National Security for the Period up to 2035 defines the main national interests of the Russian Federation in the Arctic:

- Ensuring the sovereignty and territorial integrity of the Russian Federation.
- preservation of the Arctic as a territory of peace, stable and mutually beneficial partnership.
- Ensuring a high quality of life and well-being of the population of the Arctic zone of the Russian Federation.
- The development of the Arctic zone of the Russian Federation as a strategic resource base and its rational use in order to accelerate the economic growth of the Russian Federation.
- Development of the Northern Sea Route as a competitive national transport communication in the world market of the Russian Federation.
- Environmental protection in the Arctic, protection of the native habitat and traditional way of life of the indigenous small-numbered peoples living in the Arctic zone of the Russian Federation (hereinafter referred to as the small-numbered peoples).

In addition to the Strategy, the President of Russia has adopted the Fundamentals of the State Policy of the Russian Federation in the Arctic for the period up to 2035.

The fundamentals establish the directions for the implementation of the state policy of the Russian Federation in the Arctic:

- The integrated social and economic development of the Arctic zone of the Russian Federation, as well as the development of its infrastructure.
- Development of science and technology in the interests of Arctic exploration and innovative development.
- Environmental protection and environmental safety.
- Development of international cooperation.
- Ensuring the protection of the population and territories of the Arctic zone of the Russian Federation from natural and man-made emergencies.
- Ensuring public safety in the Arctic zone of the Russian Federation.
- Ensuring the military security of the Russian Federation.
- Protection and protection of the state border of the Russian Federation.

China Has Long Been Involved in Arctic Affairs

In 1925, China joined the Svalbard Treaty and began to participate in resolving Arctic issues. China's membership in the International Arctic Science Committee in 1996 marked its more active participation in scientific research in the Arctic. Since 1999, China has organized a number of scientific expeditions to the Arctic, using its Xue Long ("Snow Dragon") research vessel as a platform. In 2004, China built an Arctic station in Ny-Ålesund in the Svalbard archipelago.

China's policy and position regarding participation in Arctic affairs is aimed at achieving the following goals:

1. Deepening research and exploration of the Arctic. The Arctic is of great value for scientific research. Arctic exploration is a priority and the main focus of China's activities in the Arctic.

2. Protecting the Arctic environment and combating climate change. China adheres to international law regarding the protection of the Arctic environment and ecosystem, as well as the conservation of its biological resources, and is actively involved in solving problems related to environmental and climate change in the Arctic.

3. Rational and legitimate use of Arctic resources. The Arctic is rich in resources, but its ecosystem is fragile. China stands for the protection and rational use of the region and encourages its enterprises to participate in international cooperation in the exploration and use of Arctic resources, maximizing their advantages in capital, technology and the domestic market.

4. Active participation in Arctic governance and international cooperation. China is striving to improve and complement the Arctic management regime. China is working to regulate and monitor the activities of Chinese citizens, legal entities, and other organizations in the Arctic in accordance with legislation to ensure that their activities comply with international law and national laws on environmental protection, resource conservation, and sustainable development.

5. Promoting peace and stability in the Arctic. China is committed to strengthening cooperation with Arctic States in the fields of maritime and air search and rescue, early warning of maritime emergencies, emergency response, and information exchange to properly address safety issues such as maritime accidents, environmental pollution, and maritime crimes.

A review of the strategies of Russia and China reveals the harmonization of the key goals of both states in the Arctic, in particular in the fields of science, ecology, economic development, and security.

Russian President Vladimir Putin said back in 2013: “To turn the Northern Sea Route into an international route that is competitive compared to traditional important routes such as the Suez and Panama Canals”.

In June 2017, the State Committee for Development and Reform of the People’s Republic of China and the State Oceanic Research Administration of the People’s Republic of China (SOA) jointly published “Proposals for maritime cooperation in the framework of the Construction of the Belt and Road”, which proposed the creation of three “blue” economic corridors, including “active assistance to the joint construction of the “blue” economic corridor, connecting Europe across the Arctic Ocean”.

In 2024, Russia launched a year-round operation plan for the NSR and, to facilitate transportation in the eastern section, added Tiksi port in the Laptev Sea as an international port.

In the “Joint Statement of China and Russia”, published in May 2024, it was announced: “... to establish a Subcommittee on Cooperation on the Northern Sea Route within the framework of the mechanism... The PRC and the Russian Federation will contribute to the transformation of the Arctic sea routes into an important international transport corridor, and encourage enterprises of the two countries to strengthen cooperation in increasing cargo turnover of the Arctic sea routes and building logistics infrastructure for them. To deepen cooperation in the field of polar shipbuilding and ship construction technologies” [3].

The Fourth Plenum of the Central Committee of the Communist Party of China (CPC Central Committee) of the 20th convocation was held in Beijing from

October 20 to 23, 2025. The main result of the plenum was the consideration and adoption of the document “Proposals of the CPC Central Committee on the development of the 15th five-year program for National Economic and social Development”.

The Plenum set the following objectives for China’s development for the 15 Five-year period from 2026 to 2030:

- progress in high-quality development;
- increasing scientific and technical independence and power;
- comprehensive deepening of reforms;
- cultural and ethical progress in the whole society;
- improving the quality of life;
- promotion of the “Beautiful China” initiative;
- strengthening the national security shield [4].

From the decision of the Plenum, it can be concluded that priorities for ensuring sovereignty, development, cooperation and security will correlate in the further implementation of China’s Arctic Strategy.

Thus, Russia and China are purposefully developing cooperation, including in the Arctic zone, and this cooperation is confirmed by both current strategies and long-term development plans.

Chinese researchers are interested in studying cooperation between Russia and China in the Arctic.

In the Arctic it is necessary to actively promote and implement a common, comprehensive, joint and sustainable concept of global security, clearly opposing unilateralism and camp confrontation. On the other hand, some countries to the mindset and position of “pan-securitization”, blindly strive for absolute security, expand security perimeters, blur the boundaries of security management, exaggerate the degree of threats, and even use exclusionary and confrontational approaches, politicizing and instrumentalizing issues of economic, trade, technological, and humanitarian issues, turning them into weapons.

China and Russia’s energy cooperation in the Arctic has also been affected by sanctions... Arctic states establish legally binding investment rules for non-regional countries, which significantly increases the risks of liability of Chinese enterprises in the Arctic in areas such as ecology, social security and human rights protection.

Under the influence of U.S. sanctions and the domestic economic situation, Russia continues to expand its openness to Chinese investment. Significant achievements in energy cooperation demonstrate the broad potential for developing comprehensive partnership and strategic cooperation between China and Russia in a new era.

Wan Chuqiao finds some difference in the approaches of Russia and China in the management of the Arctic. “Russia insists on an exclusive hierarchical model of Arctic governance with a core of Arctic states, while China adheres to an inclusive management model, involving a wider range of non-Arctic countries and subjects to participate in the management of the Arctic”. But this difference in approaches, in his opinion, does not reduce the dynamics of strengthening cooperation. “Sino-Russian Arctic cooperation is a rational choice made by Russia in the face of sanctions from the United States and other Western countries, and it is developing rapidly” [5].

Yu Huilu, Li Fei, Lin Yinghua, and others, on the one hand, identify constraints in cooperation between Russia and China. “Political mutual trust is a crucial factor in Sino-Russian Arctic cooperation, therefore, strengthening joint research in the field of international relations theory between the two countries serves as an effective policy tool”. They also determined that the United States is an active force, capable of making changes in Sino-Russian Arctic cooperation. Therefore, proper building of Sino-American relations is of paramount importance. But as a conclusion, they note the positive consequences of overcoming sanctions: “The current high level of bilateral relations between China and Russia is partly due to the West’s compression of Russia’s strategic space and the imposition of economic sanctions against it” [6].

Zhu Yan, Wang Shuchun, and Fei Junhui note that although China has long been interested and able to become a partner of Russia in the development of the sea route, it did not rush to include this route in its national initiative until Russia was psychologically ready for it. They identify the evolution of Russia’s position until 2015, “Russia showed no desire to build the Northern Sea Route together with China”. Since 2015, especially after 2017, Russia has changed its attitude towards Sino-Russian Arctic cooperation and began actively inviting China to jointly develop and use the NSR. Russia’s active invitation was an important reason for China’s policy change [7].

They identified the following reasons for the change in Russia’s position:

- As energy projects developed and the domestic and international situation changed, the development of the NSR became more and more relevant for Russia.
- The deterioration of relations with the West and the widening financial gap have increased Russia’s economic and political needs for China on Arctic issues.
- The completion of large-scale military construction in the Arctic and the optimization of the logistics infrastructure of the route have strengthened Russia’s ability to control the NSR and strengthened its confidence in attracting foreign partners.
- In the context of positive cooperation between China and Russia, Russia’s view of China’s participation in Arctic affairs has become more objective and pragmatic.

On the other hand, “China, with significant financial advantages and potential in infrastructure construction, can largely offset the risks and losses caused by Western sanctions” [7].

Kuan Zengjun and Ou Kaifei note the increasing role of BRICS in the development of the Arctic. As the overall economic power of the BRICS countries increases markedly and their international agenda is constantly strengthening, the institutionalized BRICS platform has become an important platform for global governance. Arctic governance has become an important part of global governance. Among the BRICS countries, Russia is an Arctic state, while China and India have become observer states in the Arctic Council; in addition, some BRICS countries have already begun cooperation in the Arctic. There are certain foundations for the development of joint Arctic governance for the BRICS countries, but at the same time they face numerous challenges. The BRICS countries should make full use of the existing framework for cooperation and put Arctic governance issues on the agenda. Through direct or indirect participation in the joint management of the Arctic, the region may eventually become a new area for BRICS countries to cooperate in the field of governance.

The researchers propose to create a trilateral mechanism for cooperation between China, Russia and India in the field of governance, and on the basis of bilateral and trilateral cooperation to promote the participation of all BRICS countries in the management of the Arctic [8].

The core of Sino-Russian cooperation in shipbuilding is the deep complementarity of the advantages of the parties. Russia has extensive experience in the design and operation of icebreakers, while China provides solid support through strong manufacturing capabilities and the potential for technological innovation. Military cooperation between China and Russia in the Arctic has reached a new stage: joint naval exercises, air patrols and coast guard operations mark a significant strengthening of the military presence of the two countries in the region. These military exercises have a double strategic importance. On the one hand, they enhance the defensive capabilities and military projection capabilities of China and Russia in the Arctic region; on the other hand, they send a clear signal to Western powers, indicating the growing military presence and operational capabilities of China and Russia in the Arctic, where geopolitical competition is intensifying. These actions not only strengthened military trust between the two countries, but also sent a clear signal to the international community about the increased military presence of China and Russia in the Arctic. The researcher notes that the existing competition for resources does not hinder coordination and cooperation. Despite the existence of competition and potential disagreements, China and Russia's cooperation in the Arctic remains in full compliance with their comprehensive strategic partnership. Its key goal is to jointly counter the expansion of the influence of the United States and its allies in the Arctic region. The coordinated actions of the two countries in the fields of energy resources development and infrastructure development reflect not only a common interest in opening alternative trade routes and ensuring the security of resource supplies, but also their strategic consensus on the transformation of the management architecture in the Arctic. The evolution of the current geopolitical configuration further highlights the complex nature of this partnership. Despite the fact that both sides continue to publicly emphasize the strategic importance of cooperation, the ongoing latent competition for control of resources, economic dominance and the right to vote in the management of the Arctic may affect the depth and sustainability of future cooperation in the region. This fragile balance sheet system requires the parties to properly address deep issues such as benefits distribution and strategic positioning by promoting pragmatic cooperation.

Li Zhenfu, Wang Qun, and Qi Xinli note that a new concept of Sino-Russian Arctic cooperation is being proposed as part of the Global Arctic perspective. It includes: strengthening regional ties between the program for the revival of China's Northeast and the program for the development of the Russian Far East in order to deepen network density between the two countries; creation of an international land-sea transport network connecting Asia and Europe and extending north to the Arctic Ocean, based on the vertical path of the "Silk Road over Land and Ice" and the horizontal path of the "Belt and Road"; as well as the creation of a platform for information and cultural exchanges between China and Russia in the context of the "Global Arctic". They also point out the advantages of cooperation for both Russia and China. For Russia, faced with isolation and sanctions from the United States and its NATO allies, actively adopting the concept of the "Global Arctic" and using its new identity to expand international cooperation may be a new opportunity to implement its Arctic strategy. For China, the concept of the "Global Arctic" deepens the integration

of bilateral interests, not only demonstrating China's active position and practical contribution to Arctic governance, but also presenting the international community with an example of cooperation rather than confrontation [9]. That the new international environment creates both challenges and opportunities for Sino-Russian cooperation in the Arctic. Arctic tourism, the creation of joint transport and rescue fleets, as well as the modernization of bilateral cooperation mechanisms can become promising areas for Sino-Russian cooperation in the Arctic. The risks and ways are discussed in the literature to overcome them for China's interests in the Arctic. Currently, new trends in the geopolitical game are being observed in the Arctic: the intensification of security rivalry, the complication of economic cooperation and the destruction of the existing framework of interaction. Increased Arctic competition poses threats to Chinese strategic security, damages its international image, reduces space for activities on the high seas, and calls into question the Arctic's governance mechanisms, which it has traditionally relied on. These problems create new risks for the protection of China national interests and rights in the Arctic. As a risk diversification, proposed balancing cooperation with both Russia and other Arctic countries. China needs to deepen cooperation with Russia, balance relations with the Arctic Seven and seek to expand the space for cooperation with them. Chinese authors, considering China's participation in Arctic governance and cooperation, note that Sino-Russian Arctic cooperation should be used as a breakthrough... At the same time, we strive to maintain and deepen dialogue and cooperation with other Arctic states, especially with the Northern European countries. It is necessary to accurately identify the natural features of the changing Arctic situation, combine the protection of the common interests of all mankind with the implementation of China's Arctic policy, strengthen communication and cooperation with stakeholders in such areas as energy development, navigation management, scientific research and environmental protection, constantly seek new areas of cooperation and opportunities for development, actively form a "blue partnership", contribute to achieving more positive results within the framework of the Silk Road on Ice, thereby making a greater Chinese contribution to the sustainable development of the Arctic region.

Undoubtedly, Russia is the undisputed Arctic power. Building on this potential, the formation of identity among the Arctic states and the integration of resources to change the geopolitical and economic situation in the Arctic have become important elements in the implementation of Russia's Arctic strategy. From the point of view of Russia's strategic calculations, its cooperation with China in the Arctic serves as a catalyst for the integrated development of the Arctic and the strengthening of infrastructure. For China, which advocates the creation of the Polar Silk Road, protecting national energy security in the Arctic requires interaction with states with significant influence in the region. Through the exchange of concepts, the formation of an agenda and the promotion of cooperation, it is necessary to achieve effective participation in Arctic affairs. This will help to avoid strategic overstrain due to destructive competition and lay the foundation for China's strengthening role in the development of Arctic energy resources.

Conclusion

Many Chinese researchers note obstacles to increased cooperation between Russia and China in the Arctic region, such as competition for resources, sanctions confrontation between Russia and Western countries and Western pressure on

China and other neutral countries to isolate Russia, Russia's fears for its sovereignty over its part of the Arctic region, but they consider such contradictions as uncritical. Much greater factors encourage increased cooperation between Russia and China in the Arctic region, such as China's need for Russian resources, common interests in trade and security, and mutual respect for the interests of Russia and China. The development of Russian-Chinese relations in the field of Arctic exploration, strengthening cooperation between the countries, including other countries, primarily the BRICS countries, in the orbit of cooperation, joint trade through the Northern Sea Route, technological development, and security is confirmed by the current actions of the governments of Russia and China, as well as promising Arctic Development Strategies.

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Российско-китайское сотрудничество в Арктике: путь к технологическому суверенитету

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Финансирование. Настоящее исследование не получало внешнего финансирования.

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Аннотация. Рассмотрено сотрудничество России и Китая в Арктике, основной целью которого является оценка его роли в укреплении технологического суверенитета и национальных интересов обоих государств. Проанализированы российские и китайские научные подходы к вопросам суверенитета и стратегическим вызовам, а также двусторонние механизмы смягчения данных рисков. Особое внимание уделено реализации текущих и недавно обновленных арктических стратегий России и Китая. В результате сделаны выводы о том, что, несмотря на наличие у сторон собственных национальных приоритетов, их стратегические интересы в значительной степени совпадают, что создает благоприятные условия для устойчивого двустороннего сотрудничества в Арктике.

Ключевые слова: Арктика, Россия, Китай, сотрудничество, суверенитет

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Research article / Научная статья

Afghanistan and BRICS: A SWOT Analysis of Integrating an Isolated State into New International Alliances

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Abstract. This article examines Afghanistan's potential integration into the BRICS framework amid its profound international isolation following the Taliban's return to power in 2021. The central research question explores whether and how Afghanistan — despite lacking formal diplomatic recognition, facing severe socio-economic constraints, and implementing restrictive domestic policies — can engage with BRICS and its expanded BRICS+ formats. To address this, the study employs a qualitative SWOT analysis grounded in a systematic review of academic literature, policy documents, and official reports, integrating insights from key scholarly works on regional integration, SCO–BRICS dynamics, and the structural challenges of expanded BRICS cooperation. The analysis reveals that while Afghanistan possesses strategic geographic positioning, vast mineral resources, and growing interest from BRICS members in infrastructure and humanitarian cooperation, its path to meaningful engagement is hindered by non-recognition, institutional fragility, gender-based restrictions, and persistent security threats — particularly from Islamic State Khorasan Province (ISIS Khorasan)*. The findings suggest that Afghanistan's most viable trajectory lies in phased, low-threshold participation through BRICS+ thematic dialogues and project-based initiatives (e. g., the Trans-Afghan Railway and mining ventures), which could gradually enhance its diplomatic agency. However, without significant improvements in governance, macroeconomic stability, and human capital inclusivity, Afghanistan risks remaining a “passive beneficiary” rather than an active co-shaper within the emerging BRICS-led order.

Keywords: Afghanistan, BRICS, BRICS+, integration, international isolation, SWOT analysis, geopolitics, international alliances

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Introduction

With the Taliban* movement's rise to power in August 2021, Afghanistan has entered a new phase of political inertia and international isolation. Despite the lack of broad diplomatic recognition, the Taliban* leadership has consolidated control over most of the country's territory but faces a shortage of external financing, non-recognition, and structural problems in public administration. In a few instances, there has been an uptick in domestic instability and heightened activity by Islamist groups such as ISIS-Khorasan**, undermining security nationwide [1].

Since 2021, Afghanistan's economy has suffered a severe downturn: according to the International Institute of International Economic Studies (IIMES), GDP shrank by roughly 6.2% in 2022, and the decline continued in 2023–2024 due to reduced exports, the cessation of external aid, and restricted access to financial markets. Reports indicate the country is “surviving” thanks to critical assistance from neighboring states and resilient trade channels with major economies such as China and Russia [2]. For instance, Russia has emerged as an active partner: bilateral trade between Russia and

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Afghanistan reached USD 174 million over the first eight months of the Afghan year (from March 21). There are intentions to raise bilateral trade to USD 3 billion in 2025 and to expand investment projects in agriculture and infrastructure [3].

The external trade balance remains highly vulnerable. As of 2024, the trade deficit widened by 54% to approximately USD 9 billion, or around 45% of GDP. The main blow fell on coal and textile exports — coal exports plunged 64% to USD 92 million as key markets, such as Pakistan, shifted to alternative suppliers [4]. Additionally, the regional security remains a serious concern. According to the Russian International Affairs Council, despite some reduction in internal violence since 2021, uncertainty persists — terrorist groups (including ISIS-Khorasan*) remain active, and the country continues to pose threats to Central Asia [5].

The humanitarian situation is critical. In areas hit by natural disasters (e.g., following a recent earthquake in the country's east), casualties and the number of affected continue to rise, while access for humanitarian aid is heavily constrained by logistical and bureaucratic barriers. UN OCHA estimates that tens of millions of people require assistance; service availability remains limited [6]. However, also by the aid of countries in the region, the humanitarian issues are in the better circumstances. For example, Russia has already delivered an initial tranche of aid—20 tons of food and medicines — and is considering further engagement via EMERCOM structures [7].

Critical infrastructure — including roads, railways, energy grids, and water systems — suffers from severe degradation and chronic underinvestment. However, in 2025, China, Russia, and Uzbekistan called for increased investment in infrastructure projects in Afghanistan, potentially offering an entry point for external investment and international cooperation [8]. The cooperation of countries in the region shows the importance of Afghanistan as a location, and willingness of these countries for improvement and progress of this country.

Surely, restrictions imposed by the Taliban** have had especially severe impacts on education and healthcare for women and girls. Since 2022 they have been barred from education beyond sixth grade and are practically excluded from universities. Afghanistan has become the only country where women are prohibited from attending secondary and higher education, exacerbating the shortage of qualified female medical workers and teachers [9]. In health, the reduction of international aid and the closure of medical facilities have deepened the crisis. Many systems operate on the brink of collapse, while women's access to healthcare is constrained by mobility restrictions without male accompaniment and by the lack of female medical personnel. Moreover, in early 2025 the Taliban's Ministry of Higher Education revoked approximately 500 scholarships provided by Russia, illustrating inconsistency in education policy and limiting external engagement in this sphere [10].

The current situation in Afghanistan demonstrates that the country faces multifaceted challenges — not only stemming from economic collapse, humanitarian crises, deteriorating infrastructure, and persistent security threats from groups like ISIS-Khorasan*, but also significantly exacerbated by the Taliban's** restrictive domestic policies, particularly the systematic exclusion of women and girls from education and healthcare. These internal measures have deepened institutional fragility and

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limited international engagement, as seen in the revocation of Russian scholarships and the near-total isolation of Afghan women from public life. Nevertheless, the sustained interest and pragmatic cooperation of regional actors in expanding trade, delivering humanitarian aid, and investing in infrastructure signal a cautious yet tangible hope for stabilization and gradual development. Moreover, the Taliban's* expressed interest in joining BRICS reflects a strategic aspiration to break out of diplomatic isolation and integrate into emerging multilateral frameworks, potentially opening new avenues for dialogue and conditional cooperation, albeit contingent on significant policy shifts and regional security assurances.

Materials and Methods

This study builds upon four key scholarly works that collectively establish the theoretical and empirical foundation for analyzing Afghanistan's evolving relationship with BRICS through a SWOT framework. F.M. Khalmatova analysis of Afghanistan's new steps toward regional integration [11] provides critical insight into the diplomatic momentum generated by the 2022 Tashkent Conference, which marked a turning point in the Taliban's* engagement with neighboring states and major powers — including BRICS members — despite lacking formal recognition. This directly informs the author's assessment of Afghanistan's external opportunities, particularly how regional economic initiatives such as the Trans-Afghan Railway and preferential trade arrangements with China and Pakistan create potential entry points for deeper BRICS involvement. S. Rauf examination of transboundary interactions between Afghanistan and the Shanghai Cooperation Organization (SCO) after the U.S. withdrawal [12] offers essential geopolitical context, demonstrating how security concerns, counterterrorism cooperation, and functional economic collaboration within the SCO framework increasingly overlap with BRICS interests — especially given the shared membership of Russia, China, and India. This duality enables the author to treat SCO dynamics as a proxy for understanding BRICS' cautious yet pragmatic engagement with Taliban-led* Afghanistan.

The study by E. Bakhmetyeva and A. Morozkina on the expanded BRICS and common growth challenges [13] establishes the macroeconomic and structural baseline necessary for evaluating Afghanistan's compatibility with BRICS' developmental priorities. By highlighting divergent income levels, investment patterns, demographic structures, and innovation capacities across BRICS members, the authors underscore the group's internal heterogeneity — which paradoxically creates space for Afghanistan's inclusion as a low-income, resource-rich partner requiring infrastructure and institutional support. This comparative lens anchors the author's SWOT analysis of Afghanistan's internal weaknesses (e.g., governance gaps, gender restrictions) against BRICS' stated commitment to inclusive, non-Western models of development. Finally, V.I. Yurtaev and A.S. Rogov seminal work on SCO and BRICS in Eurasian integration [14] provides the conceptual bridge between regional and intercontinental cooperation, framing BRICS not merely as an economic bloc but as a “portal” for subregional economies to access global governance reform. Their emphasis on “clustered trade-economic partnerships” and the “convergence” of the Eurasian Economic Union with China's Belt and Road Initiative directly supports the author's argument that Afghanistan's geographic

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centrality and untapped mineral wealth position it as a potential node in BRICS-led connectivity projects — provided political and security risks are mitigated.

Methodologically, this article employs a qualitative literature-based SWOT analysis, drawing on primary and secondary sources — including official declarations, academic studies, and policy reports — to systematically evaluate Afghanistan's strategic position vis-à-vis BRICS. The approach integrates comparative institutional analysis with geopolitical and economic trend assessment, allowing for a multidimensional evaluation of strengths, weaknesses, opportunities, and threats. This methodology enables the identification of both structural constraints (e.g., non-recognition, human rights concerns) and emerging synergies (e.g., infrastructure diplomacy, alternative financial mechanisms) that shape the future trajectory of Afghanistan–BRICS relations.

Results and Discussion

SWOT Analysis

Situated at the heart of Eurasia and sharing borders with China, Pakistan, Iran, and the Central Asian states of Tajikistan, Uzbekistan, and Turkmenistan, Afghanistan can potentially serve as a hub for transport and energy corridors linking South Asia with Central and Western Asia. This objectively increases major powers' interest in integrating Afghanistan into regional projects [15].

Another factor is available natural resources in this country. Afghanistan has more than 1,400 registered mineral deposits — including copper, iron ore, lithium, rare-earth elements, oil, and gas — many of which remain undeveloped [16]. With adequate infrastructure and stability, this resource wealth could be worth trillions of dollars. That point brings us to the next strength of Afghanistan that is investment interest from external actors. Governments and companies from China, Russia, and other states have already expressed interest in mining and infrastructure initiatives in Afghanistan. In 2023–2025, several multi-billion-dollar mining contracts were concluded, indicating investment potential [17].

Demographic potential and a young population can also be counted as one of the significant features of Afghanistan. The population is estimated at roughly 44–45 million (as of 2025) [18], with a significant youth share. If education, employment, and institutions can be ensured, a young population is a potential labor asset.

Lack of international recognition is the main issue for Afghanistan in the current moment. Since the Taliban's* takeover in August 2021, Afghanistan has faced unique international isolation: no UN member state has officially recognized the new government; diplomatic contacts are largely at a working level. This has systemic consequences. Kabul cannot participate fully in international financial mechanisms, including the IMF and World Bank, depriving it of access to investment and credit. Political isolation also limits Afghanistan's ability to take part in multilateral initiatives, including BRICS/BRICS+. The legitimacy deficit is thus a key barrier to integration.

A weak, unstable economy that is highly dependent on external aid creates the high issue for other countries and members of BRICS for cooperation. After most international

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assistance ended in 2021–2022, the country has seen a sharp GDP contraction, rising poverty, and limited access to global financial markets. Humanitarian agencies report that more than 23 million people (nearly half the population) need aid to meet basic needs. According to the World Bank, macro indicators in 2024–2025 remain volatile and consumer activity weak. The economy depends on imports of food and fuel, while domestic production remains fragmented and uncompetitive — limiting Afghanistan's ability to join major BRICS investment initiatives [19].

The issue of restrictions in education and healthcare, especially for women, additionally can limit the collaboration of BRICS members with Afghanistan. The degradation of human capital due to harsh gender policies is among Afghanistan's most acute weaknesses. Since 2022, girls have been prohibited from schooling beyond sixth grade, and universities are closed to women. These measures lead not only to discrimination but also to a long-term loss of qualified professionals, especially in health and education [19]. Limits on women's employment undermine productivity and damage the country's international image — posing an obstacle to equitable partnerships with BRICS members that publicly emphasize sustainable development.

Corruption remains deeply entrenched. Despite initial declarations by the Taliban* to curb embezzlement and abuses, opaque governance and shadow practices persist. Transparency International consistently places Afghanistan near the bottom of global corruption perception rankings. The absence of an independent judiciary, centralized oversight, and clear regulatory rules means decisions are made informally and depend on personal ties or factional affiliation. This institutional weakness directly affects the country's attractiveness to investors. Any energy, mining, or infrastructure project faces risks of "hidden taxes", arbitrary restrictions, and corruption-related costs [20]. In the context of integration with BRICS — where member states require relatively predictable rules of the game and long-term guarantees — Afghanistan's high level of corruption remains a serious obstacle to a full-fledged economic partnership [21].

Participation in BRICS+ can be a good opportunity for Afghanistan as a platform for legitimization. BRICS expansion in 2024 and the activation of Outreach/Plus tracks create an opening for targeted engagement: participation in events, sectoral dialogues, and Global South projects can enhance Kabul's diplomatic agency without requiring immediate formal recognition. For the IEA authorities, this could be a tool of "soft" legitimization via cooperation in transport, trade settlement, and humanitarian programs, aligning with BRICS' stated agenda of inclusivity and expanded partnership formats [22].

Additionally, the trans-Afghan railway (Uzbekistan–Afghanistan–Pakistan), with a framework agreement for a feasibility study signed in Kabul on July 17, 2025, could cut delivery times from Central Asia to Arabian Sea ports from 35 to 3–5 days [23]. In parallel, TAPI remains a key energy corridor for regional integration. For Afghanistan, participation offers a chance to solidify its role as a transit hub and secure steady budget revenues [24].

Attracting investments due to the available resources and important location can be very significant for Afghanistan. Russia has publicly declared it is working up investment projects in Afghanistan, including railway construction; in August 2025 China discussed with Kabul practical starts in mining and the possibility

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of formally joining the BRI [25]. This forms a window for targeted infrastructure and resource projects, subject to guarantees for security and transit.

On the other hand, even under constraints, trade with neighbors is growing. Afghanistan became Russia's largest flour buyer in 2024 (nearly USD80 million), while trade with Iran reached USD 3.14 billion in 2024 (mostly Afghan imports, according to Iran) [26]. These flows strengthen alternative logistics and settlement channels outside Western markets and lay a foundation for subsequent investment cooperation.

Humanitarian and educational cooperation could be a good opportunity and subject for ease isolation. Humanitarian deliveries and education quotas remain the most "neutral" channels of engagement: Russia regularly sends aid (EMERCOM operations in September 2025), and the Russian MFA confirms scholarship quotas for Afghan citizens to study at Russian universities [27]. Combined with UNESCO/UNICEF programs, this helps preserve human capital and foster long-term links with BRICS partners.

Although the scale of war has diminished, ISIS-Khorasan* cells retain the capacity for high-fatality attacks and cross-border operations — from Afghanistan to Iran, Pakistan, and beyond. According to the UN Secretary-General's June 2025 report, attacks continue, and ISIS-Khorasan* remains a key threat to security and political stability, with international briefs noting an expanding "operational radius" and intent to act outside the region. This raises risks for foreign projects and transit corridors that underpin integration plans.

Additionally, the sanction pressure and international isolation threatening potential cooperation. The UNSC 1988 regime maintains asset freezes, travel bans, and arms embargoes on Taliban** officials. Decisions to "unfreeze" Afghanistan's central bank reserves have been partially channeled through the Swiss-based Fund for the Afghan People, which does not give Kabul direct control [28]. This limits macro-financial maneuvering and undermines long-term investment plans — including within BRICS+ formats.

Also, Afghanistan remains a crossroads of interests. China promotes resource and infrastructure initiatives (including possible BRICS accession); India steps up engagement via corridors through Iran (Chabahar); Russia strengthens security and economic contacts; the US influences parameters of external deals indirectly through sanctions and financial levers [29]. Kabul risks becoming a venue for "soft balancing" between Chinese and Indian projects while depending on Russian–Central Asian transit routes.

Even assuming involvement in BRICS+ tracks, low institutional capacity and economic weakness may lock Afghanistan into the role of "passive beneficiary"—a recipient of projects and humanitarian aid without access to rulemaking. Studies on BRICS expansion highlight a dilemma that the broader the club, the harder it is to maintain manageability and "quality of cooperation," with the heterogeneity of partners increasing the risk of marginalization for weaker participants [22]. This conclusion on "peripherality" applies to Afghanistan too.

The last important challenge and danger is the socio-humanitarian crisis and mass migration. As of 2025, tens of millions need humanitarian assistance; at the same time, mass returns from Iran and Pakistan are growing — more than 714,000 Afghans returned from Iran in the first half of 2025 alone [30]. The combination

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of underfunded humanitarian plans and forced displacement pressures the labor market, social services, and border security — worsening conditions for long-term projects in logistics and mining [6].

This analysis identifies three plausible trajectories for Afghanistan’s evolving relationship with the expanded BRICS framework, each shaped by the interplay of domestic governance choices, regional geopolitical dynamics, and the institutional flexibility of BRICS+ formats.

The first — most constructive — scenario envisions Afghanistan leveraging the Outreach and thematic engagement mechanisms of BRICS to initiate “low-threshold” diplomatic and economic interaction without requiring formal recognition of the Islamic Emirate of Afghanistan (IEA). Through participation in sectoral dialogues on logistics, humanitarian cooperation, and education, Kabul could incrementally enhance its diplomatic agency and establish functional channels with key Global South economies. Such engagement would not only circumvent the political impasse surrounding recognition but also align Afghanistan with the inclusive development narrative advanced in BRICS’ 2025 presidency documents.

A second, project-driven pathway builds on concrete infrastructure initiatives that anchor Afghanistan within regional connectivity architectures. The Trans-Afghan Railway — linking Uzbekistan, Afghanistan, and Pakistan — exemplifies this approach. It could transform Afghanistan into a strategic transit corridor between Central Asia and the Arabian Sea. If realized, this project could generate stable transit revenues, foster external economic linkages, and serve as a tangible entry point for deeper integration into BRICS-aligned economic circuits. Complementing this, bilateral overtures offer a parallel track for “project-based” integration. These initiatives could later be elevated to multilateral BRICS platforms, thereby institutionalizing Afghanistan’s role beyond ad hoc participation.

Conversely, a third scenario entails prolonged international isolation. Persistent sanctions, travel restrictions on IEA officials, and the absence of access to multilateral financing mechanisms continue to impede Afghanistan’s ability to engage substantively with global economic institutions. Under these conditions, even BRICS+ participation risks remaining episodic, symbolic, and devoid of tangible economic or institutional returns. Without formal channels for investment guarantees, technical assistance, or policy dialogue, Afghanistan’s engagement would lack the depth necessary for meaningful influence.

Overall, the most realistic trajectory appears to be a phased, pragmatic engagement model — mediated through BRICS Outreach mechanisms and anchored by high-impact infrastructure projects — that aligns with the bloc’s Global South-oriented agenda. However, this pathway remains contingent upon addressing systemic vulnerabilities in Afghanistan’s macroeconomic structure. Persistent trade deficits, fiscal instability, and acute humanitarian pressures constrain the state’s capacity to act as an active co-shaper of regional economic governance. Absent significant improvements in external trade balances, fiscal sustainability, and humanitarian access, Afghanistan may remain confined to the role of a “passive beneficiary” — integrated functionally but excluded from normative and institutional decision-making within the emerging BRICS-led order.

Conclusion

The analysis shows that Afghanistan’s engagement with BRICS yields mixed effects: significant potential benefits (transit, resources, humanitarian agenda) coexist with substantial constraints (domestic uncertainty, sanctions and institutional barriers).

In the short to medium term, targeted cooperation formats are realistic, whereas deeper participation is possible only if several prerequisites identified in this study are met.

There are windows for cooperation in infrastructure, energy, and humanitarian programs; BRICS members' interest in Eurasian connectivity and logistics diversification makes Afghanistan a potential hub under favorable conditions. On the other hand, low institutional resilience and legal uncertainty reduce the predictability of commitments; security risks raise transaction costs for projects.

However, practical cooperation requires gradualism, anchoring in specific sectors with low regulatory risk, and reliance on multilateral monitoring and transparency mechanisms. But for sure there are some risks in this regard. Continued foreign-policy fragmentation and sanctions constraints may block financing and international recognition of outcomes, narrowing initiatives to pilot formats.

Regarding the BRICS track, it will be wise to be more focused on low-risk areas such as humanitarian and educational programs, healthcare, agriculture, workforce training, and preliminary technical work on transport corridors without capital-intensive commitments. This phased approach could serve as a foundational pathway for Afghanistan's constructive, albeit incremental, participation in BRICS-led initiatives.

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Афганистан и БРИКС: SWOT-анализ интеграции изолированного государства в новые международные объединения

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Аннотация. Рассмотрен потенциал интеграции Афганистана в структуру БРИКС на фоне глубокой международной изоляции, вызванной возвращением к власти движения «Талибан» в 2021 г. Основной исследовательский вопрос заключается в том, может ли Афганистан, несмотря на отсутствие официального дипломатического признания, серьезные социально-экономические ограничения и реализацию жесткой внутренней политики, встроиться в сотрудничество с БРИКС и его расширенным форматом БРИКС+, каким образом это может произойти. Для решения поставленной задачи применен качественный SWOT-анализ, основанный на систематическом обзоре академической литературы, политических документов и официальных отчетов, а также на синтезе ключевых исследований, посвященных региональной интеграции, взаимодействию ШОС и БРИКС, а также структурным вызовам расширения сотрудничества в рамках БРИКС. Показано, что, обладая стратегическим географическим положением, обширными запасами полезных ископаемых и растущим интересом со стороны стран БРИКС к инфраструктурному и гуманитарному сотрудничеству, Афганистан сталкивается с серьезными препятствиями на пути к полноценному взаимодействию: отсутствием международного признания, институциональной неустойчивостью, ограничениями в сфере гендерного равенства и сохраняющимися угрозами безопасности, в первую очередь со стороны Исламского государства – провинция Хорасан. Полученные результаты свидетельствуют, что наиболее реалистичной траекторией для Афганистана является поэтапное участие в БРИКС+ через тематические диалоги и проектно-ориентированные инициативы (например, Трансафганскую железную дорогу и горнодобывающие проекты), что со временем может способствовать укреплению его дипломатической субъектности. Вместе с тем без существенных улучшений в сфере управления, макроэкономической стабильности и инклюзивности человеческого капитала Афганистан рискует остаться пассивным бенефициаром, а не активным соучастником формирующегося миропорядка, лидером которого выступает БРИКС.

Ключевые слова: Афганистан, БРИКС, БРИКС+, интеграция, международная изоляция, SWOT-анализ, геополитика, международные альянсы

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Research article / Научная статья

Economic Cooperation Among the Countries of the Global South: Institutional Transformations, Development Trajectories, and the Emerging Role of BRICS+

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Abstract. Economic cooperation among the countries of the Global South is reshaping the architecture of the world economy amid growing geopolitical fragmentation and the erosion of traditional centers of global influence. This article examines the structural foundations, institutional mechanisms, and new forms of South–South cooperation across Asia, Africa, Latin America, and the Middle East, focusing particularly on the coordination potential of the BRICS+ framework. The research employs comparative institutional analysis, network modeling of trade and investment linkages, and documentary analysis of national development strategies and multilateral agreements. The results reveal three major transformations: 1) the formation of transregional production and logistics corridors that bypass traditional global hubs; 2) accelerated institutionalization of new financial platforms and local-currency mechanisms; and 3) increasing technological and industrial collaboration within the Global South. The discussion highlights the persistent challenges of institutional heterogeneity, infrastructure asymmetry, and regulatory fragmentation, while also identifying strategic pathways for deepening cooperation. The article concludes that BRICS+ is evolving into a systemic coordination hub with the capacity to integrate regional initiatives and amplify the development potential of the Global South.

Keywords: Global South, BRICS+, cooperation, multilateralism, regional integration, economic development, financial architectures, trade networks

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Introduction

The accelerating economic and political transformation of the Global South has emerged as one of the defining trends of the 21st century. Countries of Asia, Africa, Latin America, and the Middle East now account for a rapidly expanding share of global manufacturing, technology adoption, energy production, and cross-border investment. The reconfiguration of the world economy toward a multipolar structure is increasingly driven by South–South cooperation, which offers alternative development pathways independent of traditional Western-centered global governance [1–3].

Over the past decade, a growing body of research has documented the intensifying interaction among developing economies in trade, infrastructure, finance, technology, and human capital development [4]. The expansion of BRICS+, the establishment of new development banks, the creation of regional payment systems, and the formation of new trade corridors illustrate the scale of this transformation. These processes unfold against a backdrop of geopolitical tensions, sanctions, and the weakening capacity of traditional global institutions, creating additional incentives for Global South countries to strengthen mutual cooperation [5; 6].

The academic debate on the Global South highlights two broad perspectives. Structuralist scholars argue that contemporary cooperation represents a corrective mechanism addressing long-standing imbalances in the global economic

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system — particularly dependency on Western financial institutions and unequal participation in global value chains [7]. Conversely, neo-developmental and innovation-centered approaches emphasize endogenous modernization, industrial upgrading, and technological leapfrogging driven by cross-regional partnerships [8]. Despite these differences, both schools of thought converge on the idea that the Global South is no longer a passive recipient of external influence but an active architect of new development trajectories.

The aim of this article is to evaluate the emerging forms of economic cooperation among the countries of the Global South and to identify the institutional, technological, and structural mechanisms that shape this cooperation. The study further investigates the potential of the BRICS+ framework as a coordinating platform capable of consolidating diverse regional initiatives.

Materials and Methods

The methodological framework integrates qualitative and quantitative approaches to ensure a comprehensive assessment of the complex processes shaping economic cooperation within the Global South:

- **Comparative Institutional Analysis.**

This method enables the examination of governance models, policy instruments, and cooperation formats across regional organizations such as BRICS+, the African Continental Free Trade Area (AfCFTA), ASEAN, Mercosur, and the Gulf Cooperation Council. Institutional variability is assessed through regulatory density, decision-making mechanisms, and coordination efficiency [9].

- **Network Modeling of Trade and Investment Relations.**

Using datasets from UNCTAD, the World Bank, and ITC Trade Map, South–South trade and investment flows are analyzed through network centrality indicators, identifying emerging hubs and cross-regional clusters.

- **Cluster Analysis of Development Indicators.**

Indicators such as export diversification, industrial complexity, financial openness, and infrastructure quality are applied to group countries according to their cooperation potential and structural complementarities.

- **Documentary Analysis.**

National development strategies, BRICS summit declarations, regional agreements, and policy reports are examined to identify institutional designs, policy priorities, and alignment mechanisms.

- **Expert-Based Analytical Synthesis.**

This approach is employed for interpreting results in light of theoretical frameworks and geopolitical dynamics, as well as for forecasting future trajectories of South–South cooperation [10].

Results and Discussion

The analysis of economic cooperation among the countries of the Global South demonstrates that contemporary South–South interaction is driven by a set of deeply embedded structural transformations reshaping the global economic landscape. One of the most significant foundations of this transformation is the demographic expansion observed across Asia, Africa, Latin America, and the Middle East. With these regions accounting for the majority of the world's population, their economic weight

increasingly manifests through enlarged domestic markets, expanding labor forces, accelerating urbanization, and rising consumer demand. Such demographic dynamics generate long-term momentum for intraregional and interregional cooperation.

Parallel to demographic expansion, industrial reconfiguration is unfolding across many Global South economies. A gradual but persistent transition from raw-material dependence toward diversified manufacturing, advanced services, and technology-intensive sectors has strengthened complementarities among partner countries. This structural diversification contributes to the formation of new production capabilities and encourages the creation of regional value chains that support economic resilience and innovation. As global value chains become increasingly multipolar, production is no longer concentrated in a narrow set of advanced economies. Instead, hubs of manufacturing and innovation are emerging in countries such as China, India, Brazil, South Africa, and several Southeast Asian states. These hubs serve as anchors for cross-regional networks that extend into Africa, the Middle East, and Latin America.

The empirical analysis also reveals the emergence of innovative financial instruments and institutional mechanisms designed to reduce dependence on traditional Western-centered monetary and financial infrastructures. Initiatives within the BRICS+ framework — such as the expansion of the New Development Bank, the promotion of local-currency settlements, and the introduction of digital payment platforms — illustrate a concerted effort to enhance monetary autonomy, diversify financial channels, and facilitate cross-border transactions. These financial innovations are accompanied by the development of new production and logistics corridors that connect distant regions of the Global South through infrastructure investments, trade agreements, and sectoral partnerships in energy, pharmaceuticals, food security, and high technologies. The India–Africa digital cooperation platform, the Middle East–Asia energy corridor, and the Latin America–Asia agricultural and industrial supply chain networks all represent notable examples of intensifying connectivity.

Despite these developments, significant challenges persist. Institutional heterogeneity remains a major constraint: countries differ substantially in regulatory frameworks, governance capacities, financial openness, and strategic priorities. Such divergence complicates efforts to create a harmonized environment for trade, investment, and industrial collaboration. Infrastructure constraints — particularly in transportation, energy, and digital networks — continue to limit the scale and depth of South–South cooperation, with Africa and parts of Latin America facing the most acute connectivity gaps. Regulatory fragmentation across regional blocs further increases the transaction costs of cross-regional cooperation, while technological asymmetries undermine the potential for joint innovation initiatives. These challenges indicate that although South–South cooperation is expanding, its institutional and structural foundations require further consolidation.

The results of this study illuminate a profound reconfiguration of international economic relations, whereby the Global South is emerging not as a peripheral collection of developing regions but as a systemically important network of economic centers. This transformation can be interpreted through several theoretical lenses. From the perspective of multipolarity theory, the increasing density of South–South economic ties reflects a broader shift toward a decentralized global order in which regional powers and coalitions play an increasingly decisive role in shaping development trajectories. The observed expansion of trade and investment networks among Global South countries supports the notion that

economic influence is diffusing away from traditional North Atlantic institutions toward more diverse institutional configurations.

Structuralist interpretations offer an alternative yet complementary understanding of these dynamics. According to this perspective, South–South cooperation represents a strategic response to the historical asymmetries embedded in global trade, production, and finance. The growing use of local-currency settlements, the establishment of new regional financial institutions, and the expansion of the BRICS+ framework can be viewed as corrective mechanisms aimed at mitigating dependency on dominant-currency systems and Western financial architectures. By broadening access to development finance and enabling cross-border transactions independent of traditional intermediaries, these mechanisms strengthen the economic sovereignty of participating states.

At the same time, neo-developmental and innovation-centered frameworks emphasize endogenous modernization processes within the Global South. The rise of cross-border technological alliances, distributed digital infrastructures, and collaborative research ecosystems points to the emergence of a new model of innovation-driven cooperation. In this view, the Global South is not merely reacting to external structural constraints but is actively constructing the technological and industrial foundations necessary for self-sustaining growth. The increasing connectivity among innovation clusters in Asia, Africa, and Latin America highlights this shift toward collaborative technological upgrading.

Despite these encouraging developments, the discussion also underscores the persistence of systemic constraints. Institutional fragmentation remains one of the most persistent barriers to deeper integration, reflecting differences in governance models, regulatory standards, and administrative capacity across regions. While such diversity is inherent in a system composed of nations with distinct historical trajectories, it complicates efforts to achieve regulatory interoperability. Furthermore, infrastructure asymmetries limit the scalability of cooperative projects: without adequate transport, energy, and digital infrastructures, the potential for expanding trade and investment corridors remains unevenly distributed.

Nevertheless, the emerging role of BRICS+ as a systemic coordination hub suggests a possible avenue for overcoming these constraints. The framework's institutional flexibility, consensus-based governance, and capacity to integrate diverse regional initiatives position it as a central node within the broader architecture of South–South cooperation. BRICS+ offers an organizational platform for harmonizing standards, mobilizing development finance, and supporting sectoral collaborations in areas such as energy, food security, pharmaceuticals, renewable technologies, and digital governance. As such, the framework may serve as a mechanism for transforming fragmented regional efforts into a consolidated system of cross-regional cooperation.

The long-term trajectory of South–South cooperation will likely depend on the ability of Global South countries to strengthen connectivity, deepen financial sovereignty, and embed technological innovation into their development strategies. Sustainable development imperatives — including climate adaptation, renewable energy transitions, and circular economy frameworks — add an additional layer of complexity but also open new opportunities for coordinated action. If these structural, institutional, and technological challenges are addressed effectively, the Global South has the potential to evolve into a coherent economic space with significant influence on global governance and international development trends.

Conclusion

The findings of this study demonstrate that economic cooperation among the countries of the Global South is undergoing a multidimensional transformation that reflects deeper structural changes in the global political economy. Far from being a temporary response to geopolitical turbulence or a pragmatic adjustment to shifting trade patterns, South–South cooperation has evolved into one of the most dynamic and strategically significant vectors of contemporary international development. The demographic scale, resource endowments, growing technological capabilities, and intensifying institutional innovations across the Global South are collectively redefining the foundations of global economic governance.

The analysis conducted in this research highlights several interrelated conclusions. First, the increasing economic weight of Global South countries is reshaping global production and consumption patterns. The convergence of demographic expansion, industrial diversification, and the rise of regional innovation ecosystems has created a new architecture of complementarities. These complementarities drive a structural convergence among economies that historically occupied peripheral positions in the global value chain system. As a result, the Global South is becoming a generator — not merely a recipient — of industrial, technological, and financial impulses.

Second, financial and institutional innovations within the Global South are increasingly aimed at reducing systemic vulnerabilities associated with the traditional global financial order. The expansion of local-currency settlements, the institutional strengthening of the New Development Bank, and the development of digital payment infrastructures reflect a deliberate strategy to enhance monetary sovereignty and create more resilient financial channels. These initiatives not only diversify development finance but also reshape the rules of engagement in international economic relations.

Third, the emergence of new trade, logistics, and production corridors illustrates the growing spatial integration of the Global South. These corridors — spanning Asia, Africa, Latin America, and the Middle East — facilitate the formation of distributed production networks that are more flexible, diversified, and regionally embedded. The development of cross-regional infrastructure and energy systems, combined with the digitalization of supply chains, strengthens the autonomy of South–South partnerships and reduces the dependence on traditional global intermediaries.

Fourth, despite significant progress, substantial structural and institutional challenges persist. Regulatory fragmentation, asymmetries in governance capacity, insufficient infrastructure, and uneven technological capabilities continue to constrain the full realization of cooperation potential. Addressing these constraints requires a coordinated long-term strategy aimed at building interoperability between regional systems, improving institutional quality, enhancing investment security, and strengthening the institutional environment for innovation-driven development.

Fifth, the evolving BRICS+ framework has emerged as a central coordination mechanism with the potential to integrate diverse regional blocs into a coherent, system-level architecture. Its institutional flexibility, consensus-based decision-making, and emphasis on inclusive multilateralism position BRICS+ as a platform capable of harmonizing standards, aggregating development resources, and promoting sectoral cooperation across key areas — infrastructure, energy, financial innovation, digital transformation, and human capital development. The analysis

suggests that BRICS+ is uniquely positioned to serve as the structural backbone of an emerging Global South economic space.

Taken together, these findings indicate that the Global South is transitioning from a reactive participant in the global economy to a proactive architect of new models of development, cooperation, and governance. The consolidation of South–South ties — supported by financial autonomy, technological collaboration, and institutional innovation — signals the emergence of an increasingly interconnected system that is capable of exerting significant influence on global economic outcomes.

Future research should focus on deepening the empirical assessment of sectoral cooperation, quantifying the long-term effects of financial and institutional innovations, and evaluating the resilience of emerging South–South architectures to global shocks. In addition, the role of digital platforms, renewable energy transitions, and climate-related cooperation offers promising directions for analytical expansion. Ultimately, the long-term trajectory of the Global South will depend on its ability to balance regional diversity with institutional integration, scale innovation ecosystems across continents, and translate structural potential into sustained and inclusive development outcomes.

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Экономическое сотрудничество стран Глобального Юга: институциональные трансформации, траектории развития и формирование новой модели многостороннего партнерства в рамках БРИКС+

Ханде Ч. Терзиоглу 

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Аннотация. Экономическое сотрудничество стран Глобального Юга в настоящее время формирует новую архитектуру мировой экономики на фоне усиливающейся геополитической фрагментации и снижающегося влияния традиционных центров глобального развития. Проанализированы структурные основания, институциональные механизмы и новые формы взаимодействия между странами Азии, Африки, Латинской Америки и Ближнего Востока, особое внимание акцентируется на потенциале координации в рамках формата БРИКС+. Методологическая база исследования включает сравнительный институциональный анализ, сетевое моделирование торгово-инвестиционных связей, а также документальный анализ национальных стратегий развития и многосторонних соглашений. Полученные результаты свидетельствуют о трех ключевых трансформациях: 1) формировании трансрегиональных производственно-логистических коридоров, которые обходят традиционные центры мировой экономики; 2) ускоренной институционализации новых финансовых платформ и механизмов расчетов в национальных валютах; 3) расширении технологического и индустриального сотрудничества внутри Глобального Юга. Рассмотрены сохраняющиеся вызовы, связанные с институциональной неоднородностью, инфраструктурными ограничениями и нормативной фрагментацией, а также определены стратегические направления для углубления взаимодействия. В результате делается вывод о том, что БРИКС+ постепенно формируется как системный координационный узел, интегрирующий региональные инициативы и усиливающий потенциал развития стран Глобального Юга.

Ключевые слова: Глобальный Юг, БРИКС+, сотрудничество, многосторонность, региональная интеграция, финансовая архитектура, торговые сети, институциональные механизмы

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African Ethnophilosophy: Reflexive Models and Anthropological Insights

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Abstract. The article examines two forms of African ethnic philosophy — Bantu and Ubuntu — that have been evolving in the postcolonial period of the continent. It highlights the core principles and the categorical framework of ethnophilosophy, rooted in the indigenous values and traditions of African peoples. The analysis focuses on Bantu philosophy, widespread in Southern Africa and theoretically founded in Placide Tempels' seminal work *Bantu Philosophy*. The study emphasizes the ontological and anthropocentric nature of Bantu thought, which is based on the belief in a special life force permeating the peoples belonging to this broad ethnic group. It explores the worldview of African ethnic communities shaped by Bantu philosophy and discusses the pursuit of identity through this philosophical lens. The article also identifies the metaphysical principles of Ubuntu ethnophilosophy, where ubuntu means “humanity” in Zulu. Ubuntu, as both a worldview and a mode of theorizing among sub-Saharan peoples, encapsulates two fundamental dimensions: rootedness in cosmic being and the unfolding of human existence within the universe. The study traces certain paradigmatic features of Ubuntu as a philosophy that transcends specific ethnic communities. It introduces the African conceptualization of umuntu, which, in a universal philosophical sense, denotes the notion of a human being. The article underscores the significance of both Bantu and Ubuntu philosophies for the social, cultural, educational, and political development of the African continent.

Keywords: philosophy of Contemporary Africa, Bantu, Ubuntu, Ethnic philosophy, African identity, African renaissance

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Introduction

The African continent is characterized by a unified civilizational community that encompasses a vast number of peoples, each with their own distinct cultural and religious traditions. In the postcolonial era, Africa has witnessed a theoretical rethinking of its historical legacy and an active search for a new ethno-cultural identity — one that differs fundamentally from previous models of identification. In the philosophical culture of Africa, this process has come to be known as the African Renaissance, which is marked by a growing diversity of theoretical reflections on the ethnic, religious, and folkloric and cultural foundations of African peoples and communities.

Among the most significant currents of this intellectual resurgence are the philosophy of Bantu (which reflects the worldview of many ethnic groups in sub-Saharan Africa and is rooted in the work of Placide Tempels [1]), the philosophy of Ubuntu (widespread in Southern Africa, with the term deriving from the Zulu language meaning “humanity”), and the so-called conversational philosophy, which correlates with formal reasoning procedures and is oriented toward dialogue with other cultural traditions.

Each of these currents represents an effort to conceptualize ethnic characteristics, indigenous traditions, and African systems of belief. Taken together, they form a nascent ethnophilosophical paradigm within the broader framework of African philosophy in the postcolonial period. The foundation of this paradigm

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lies in the African thinkers' turn to indigenous worldviews and value systems, in the rationalization of mythology, the development of distinctive religious representations, and the affirmation of communality as a principle of social life, as well as in the existential interpretation of nature.

Russian philosopher A.S. Kolesnikov, in his analysis of the various strands of African thought, identifies key features of ethnophilosophy. He writes:

"Ethnophilosophy may be understood as a set of values, categories, and assumptions embedded in the language, practices, and beliefs characteristic of African cultures. As a direct offshoot of the Negritude movement, ethnophilosophy seeks to define African identity in ontological terms, since metaphysics is not separated from experience but is, in fact, an intrinsic part of it" [2, pp. 22–23].

The Senegalese philosopher, poet, and statesman Léopold Sédar Senghor noted that the diverse intellectual expressions of identity and socio-cultural existence in Africa are united by an idea that conveys a holistic African conception of the world, in which Africans themselves are seen as an inseparable and primordial part of that world [3]. Africans and the cosmos form a single synergistic reality, within which lie the uniqueness and specificity of their enduring traditions and conceptual frameworks — frameworks that give rise to new forms of philosophizing. Within this natural-philosophical unity, the African worldview finds expression in a multitude of ethno-cultural manifestations. The continent's philosophical culture thus reflects a broad spectrum of ethnic perspectives.

As scholar O.M. Mikhalina rightly observes: "Several African philosophers (K.C. Anyanwu, L.S. Senghor, P. Tempels, A. Kagame, J. Mbiti) trace the foundations of philosophy to the traditional African worldview, a perspective informed by the vastness of the continent and the diversity of its peoples" [4, p. 40].

The following section will explore two major forms of ethnophilosophical thought in contemporary Africa, represented by the conceptual frameworks of Bantu and Ubuntu.

Theoretical Framework

Bantu Philosophy

The origins of ethnophilosophy in Africa are commonly associated with the Belgian Franciscan missionary Placide Tempels, who authored the book *Bantu Philosophy* (1945), which reflected the ethnocultural worldview of the Luba people in what was then the Belgian Congo (now the Democratic Republic of the Congo). In his examination of the traditional culture and religious beliefs of the peoples collectively referred to as Bantu (from a-ba-ntu — "people"), Tempels studied 44 authentic religious systems and concluded that there were significant correspondences between Bantu philosophical principles and Christian thought.

Russian philosopher A.S. Kolesnikov emphasizes the importance of Tempels' work for shaping the subsequent "philosophical orientation" of Francophone Africa. Tempels demonstrated what he called the "reflective disposition" of the Luba people, highlighting the emergence and potential of philosophical thinking within this ethnic group [1]. As A.S. Kolesnikov notes: "He attributed to them a collective philosophy and a profound ontology... Bantu Philosophy provided both a model and a conceptual framework for the formation of an original African

philosophy and has remained a central reference point in African philosophical debates” [2, p. 19].

The emergence of ethnophilosophy in Africa is traditionally associated with the Belgian Franciscan missionary Placide Tempels, who in 1945 published his seminal work *La philosophie bantoue* (*Bantu Philosophy*). This work presented a conceptualization of the ethnocultural worldview of the Luba people, residing in what was then the Belgian Congo (now the Democratic Republic of the Congo). Through his analysis of the traditional culture and religious beliefs of various ethnic groups collectively referred to as Bantu (from a-ba-ntu—“people”), Tempels examined 44 indigenous religious systems and concluded that there were significant philosophical affinities between Bantu metaphysical principles and Christian doctrine.

Russian scholar A.S. Kolesnikov emphasizes the conceptual significance of Tempels’ work, noting its decisive influence on the subsequent philosophical orientation of Francophone Africa. Tempels, he argues, revealed a “reflective predisposition” within the Luba culture, thereby demonstrating both the nascent potential and the historical continuity of philosophical thought within this ethnic group. As Kolesnikov observes:

He attributed to them a collective philosophy and a remarkable ontology... Bantu Philosophy provided both a model and a conceptual framework for the initial development of African philosophy and has remained a central reference point in philosophical debates across the continent [2, p. 19].

According to Tempels, Bantu philosophy is grounded in several core principles. It is fundamentally ontological, as it articulates a vision of collective existence that is inherently animated by a unique “vital force” — an internal, cohesive energy that binds individuals together. The being and thought of a people are inextricably linked to this energy. This vital force possesses a form of passionarity: it may emerge, undergo stages of development, and eventually dissipate. Interpersonal relationships within the community are infused with this force, enabling individuals to exert a profound influence on others and on living beings more broadly.

The Bantu worldview also affirms the idea of divine creation — a cosmos brought into existence by God, within which human life unfolds. The vital force is transmitted not only between human minds but also to animals, plants, and even inanimate objects. Tempels maintained that the philosophical thought of so-called “primitive” peoples, as it develops, holds the potential to inform and enrich various domains of knowledge, including ethnology, law, psychology. In this sense, ethnophilosophy represents a rationalizing trajectory — one that marks a departure from mythology, magic, and archaic representations, and which positions itself as a genuine form of popular philosophy.

The ontological and anthropocentric dimensions of Bantu philosophy have been noted by many subsequent scholars. African intellectuals, drawing on Tempels’ work, have expressed diverse views on ethnophilosophy — ranging from critique to affirmation of its importance. For instance, Valentin Mudimbe acknowledged that Tempels’ book facilitates an understanding of the worldview of African ethnic groups and highlights the otherness and autonomy of African culture as a whole. Although Mudimbe, like many thinkers on the continent, employed Western conceptual tools and methodologies, he nonetheless emphasized the necessity of constructing a self-sufficient African ethnophilosophy — one grounded in non-derivative logical forms and authentic indigenous ideas [5].

It is important to note that the emerging ethnophilosophical discourse also served as a reflective medium for the processes of Christianization in Africa and contributed to reinterpreting the relationships between the individual and the community, as well as between humans and the natural world. A.S. Kolesnikov offers the following insight:

Through philosophical thinking (including Bantu philosophy — author's note), the human being is able to exercise indirect dominion over nature; the African philosophical tradition, whose roots lie in magic, is underpinned by a deep faith in the divine essence of natural elements and their capacity to fulfill human desires. In the African worldview, religion is prioritized over science, and faith is placed above reason [2, p. 12].

This transformative role of ethnophilosophy proved essential to the intellectual and cultural processes of the African Renaissance. Following the widespread resonance of Tempels' publication, a dynamic wave of interest emerged in Africa surrounding the history and cultural traditions of the diverse ethnic groups classified under the Bantu umbrella. In 1983, the International Center for Bantu Civilizations (CICIBA) was established in Libreville, the capital of Gabon. Around the same time, the periodical Muntu was launched, serving as a scholarly platform for research on this sociocultural and linguistic phenomenon.

Ubuntu Ethnophilosophy

No less metaphysical and ontological than Bantu thought, Ubuntu philosophy has served as a principal channel for the formation of African ethnophilosophy. The concept of ubuntu connects the populations across the territory south of the Sahara, imbuing them with a sense of familial atmosphere and spiritual kinship among the indigenous peoples of this vast region [2, p. 22]. Etymologically derived from the Zulu language (South Africa), the term ubuntu encapsulates the Zulu worldview and conveys the moral imperative expressed in the phrase “umuntu ngumuntu ngabantu” — “a person becomes a person through other people” [6]. This ethical axiom articulates a foundational principle of the Zulu ethos: individual existence is possible only within the context of close communal unity, grounded in humanity, mutual aid, and collective life.

In the African ethnocultural context, humanity implies the imperative to affirm one's own humanity by recognizing and affirming the humanity of others, in all its infinite diversity of expressions and forms [4, p. 43]. South African scholar Johan Broodryk describes Ubuntu as a historically authentic African worldview, shaped by the values of love, compassion, mercy, and respect. These moral norms govern interpersonal relations within ethnic communities, each of which is envisioned as a large extended family [7].

The term ubuntu is not confined to the Zulu language but is also used by other peoples of Southern Africa, which lends it polysemy and philosophical depth. As A.S. Kolesnikov observes:

This word is employed across several Bantu languages — Zulu, Xhosa, Ndebele. Botho is its Sotho equivalent, and hunhu in Shona. Mogobe Ramose argues that the meaning of ubuntu is not limited to the human world or its ethical and political dimensions. He also considers the concept within an ontological horizon [2, p. 22].

Despite its linguistic variation across ethnic groups, the term retains a unified philosophical foundation that grants it coherence and humanistic meaning. In all these linguistic and cultural contexts, “ubuntu symbolizes a human being

endowed with essential human virtues such as compassion, interconnectedness with the environment, reverence for God and the ancestors” [8, p. 144].

The identification of Africans as integral parts of the universe is reflected in the semantic structure of the word *ubuntu*, composed of the prefix *-ubu-* indicating rootedness in cosmic being and the root *-ntu*, denoting the unfolding of human existence in the universe through diverse and unique life forms. This process of existential unfolding gives rise to speech, writing systems, and various forms of knowledge, which together constitute the epistemological dimension of *ubuntu* [9]. According to Mogobe B. Ramose, *ubuntu* is the wellspring of African philosophy and holds promise for its continued development. Through the gnosis of *ubuntu*, Bantu-speaking peoples have formed social and cultural institutions, including systems of jurisprudence.

Given that the theoretical foundation of *ubuntu* lies in the concepts of humanity and humanism, it is reasonable to argue that its philosophical framework has a distinctly anthropological dimension. Anthropology, perhaps unconsciously, becomes an essential component of the worldview of the Zulu and other communities that live according to *ubuntu*. In essence, *ubuntu* is a central aspect of the broader concept *umuntu*, which, in a universal philosophical sense, simply means “human.” *Umuntu* reflects the multifaceted nature of the human being, revealing its various essential components.

O.A. Mikhulina, analyzing the work of contemporary scholar Johann Le Roux, identifies the following core elements of the anthropological concept of *umuntu*:

- *umzimba* — form, body human nature (flesh);
- *umoya* — breath, air, life;
- *amandla* — vitality, strength, energy;
- *umqondo* — head, brain, intellect;
- *ulwimi* — language, speech;
- *ubuntu* — humanity, humaneness [4, p. 43].

Among these, *ubuntu* holds primacy, as it serves as an existential principle: life within society is impossible without it, just as society itself cannot exist without the realization of this unique spiritual principle of being.

Ubuntu is thus a unique category of African thought that transcends ethnic particularism and can be viewed as a philosophical paradigm. It enables a normative understanding of human relationships across diverse ethnic collectives in Africa. As such, it functions as a practical means of communication and interaction between ethnic groups, uniting them on the basis of shared existential values. In this respect, *Ubuntu* is original, distinct, and philosophically self-sufficient. It does not resemble other philosophical systems — whether European, Confucian, or broadly Eastern [10]. Rather, *ubuntu* addresses the specific realities and traditional lifeways of African societies, where a person has always been conceived in relation to others. It offers a reflection on human nature that is revealed only through relationships with others. The values of collectivism, interdependence, compassion, and mutual assistance highlight the deep-seated foundations of traditional African life.

As noted by scholars: “*Ubuntu* may be understood as a collective African worldview characterized by strong communal solidarity (communitarianism), which plays a central role in the survival and optimal organization of African communities” [8, p. 144].

Today, *ubuntu* resonates so closely with the lived realities of African peoples that it is actively integrated into educational and pedagogical systems in several

countries of Southern Africa, such as schools in Pretoria. It has been incorporated into curricula as a value system that reflects the aspirations of modern Africans. More broadly, ubuntu embodies the cultural and civic identity of South Africans, their self-consciousness, religious convictions, and moral imperatives. In this light, ubuntu can be regarded as a system of values that unites diverse ethnic groups and reconciles various worldviews on the basis of shared philosophical and anthropological principles. This is what makes ubuntu a foundational and enduring form of ethnophilosophy in Southern Africa.

Conclusion

Overall, ethnophilosophy facilitates the search for identity among African peoples and contributes to the harmonization of relationships within communities and social groups. The theoretical frameworks developed within ethnophilosophy — both in the Bantu and Ubuntu traditions — are marked by a high degree of universality and are oriented toward the interpretation of indigenous forms of being and their practical application in contemporary life.

Bantu and Ubuntu represent flexible systems grounded in a philosophical categorical apparatus enriched by culturally specific and authentic themes. As such, they function as mediators between traditional ways of life and the processes of modernization within African societies. Precisely for this reason, these forms of philosophical reflection are now employed across various domains of social, cultural, educational, and governmental activity on the African continent. They offer paradigms of humane engagement with the individual and with collective existence as a whole.

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Африканская этнофилософия: рефлексивные модели и антропологические смыслы

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Аннотация. Рассмотрены две формы этнической философии Африки — банту и убунту, — развивающиеся в пост-колониальный период континента. Выделены основные принципы и категориальный аппарат этнофилософии, основывающейся на исконных ценностях и традициях коренных народов Африки. Проанализирована философия банту, распространенная в Южной Африке, теоретически обоснованная в книге П. Темпельса «Философия Банту». Отмечена онтологичность и антропоцентричность мышления банту, основанная на вере в особую жизненную силу, пронизывающую народы, принадлежащие к этой широкой этнической группе. Подчеркнуты особенности мировоззрения африканских этнических общностей, проводится идея о поиске своей идентичности посредством этой философии. Выведены метафизические принципы этнофилософии убунту, означающей на зулусском языке чело-вечность. Убунту как мировоззрение и теоретизирование народов к югу от Сахары являет собой два важнейших фактора: укорененность в мировое бытие и разворачивание человеческого бытия во Вселенной. Прослеживаются некоторые парадигмальные черты убунту как философии, выходящей за пределы конкретных этнических коллективов. Показано африканское видение понятия «умунту», что во всеобщем философском смысле означает сущность человека. Отмечена роль и значимость банту и убунту для социальной, культурной, образовательной и государственной деятельности Африканского континента.

Ключевые слова: философия современной Африки, банту, убунту, этническая философия, африканская идентичность, африканское Возрождение

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Research article / Научная статья

Problems of Contemporary Development of Traditional Chinese Music: Part 1

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Abstract. In the formation and development of contemporary Chinese musical practice, the issues of external influences and national identity have become matters of significant concern at the state level. In recent years, scholars in China have increasingly noted that traditional musicology should not be restricted in its use of global methodologies and approaches within music science. Traditional music represents an essential component of Chinese culture and is characterized by its diversity and complexity. This paper focuses on the specificity of musical thinking in traditional Chinese music, the modern development of its styles and genres, and the influence of traditional Chinese music on contemporary composers. It also seeks to outline possible pathways for the future development of China's national music, drawing on an analysis of relevant historical facts and classical Chinese musical works.

Keywords: Confucius, *Records on Music*, Alexander Tcherepnin, Shen Xingguan, Xiao Youmei, lü-dü, pitch-standard system, yang-qí, yin-qí, pentatonic scale, Chinese opera, traditional Chinese music

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Introduction

Relevance of the Research Topic. In modern Chinese music history, due to a specific historical background, the issue of nationalizing musical culture has consistently been a matter of serious concern. It has become one of the central problems in analyzing the interaction between Chinese musical culture and foreign cultures. At present, the development of traditional musicology in China has entered a stage of dialogue, in which indigenous theoretical concepts coexist on equal footing with Western ones — a tendency demonstrated in this article through the works of Chinese musicologists.

Research Aim: to identify the distinctive features of musical thinking in traditional Chinese music and to examine its influence on contemporary composers, primarily Chinese ones.

The source base of this study relies on research projects conducted by modern music scholars from both Russia and China. The main analytical methods employed include historical-cultural, cultural studies, musicological, ethnomusicological, comparative-typological, and practical-analytical approaches.

Theoretical Framework

Cultural Heritage and Musical-Theoretical Traditions of China

Chinese musical culture has historically developed in accordance with the fundamental principles of key philosophical, ethical, and aesthetic norms

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established in society, shaped under the influence of Confucianism, Daoism, and Buddhism. This intellectual context underlies the entire symbolic and practical system of Chinese sonic–musical thinking and represents the cultural environment within which musicians have created for centuries.

Since ancient times, in the countries of East Asia, the phenomena of high art — including music — have traditionally formed and evolved under the significant influence of religious, philosophical, and ideological doctrines. The very description of their formation and development often sought to align these phenomena with the philosophical principles and ethical norms accepted in society.

Confucianism, with its idea of harmony and order projected onto all spheres of social life — ideology and social institutions, state structure and economy, court etiquette and family relations, science and the arts — fostered an early tendency among the Chinese, followed later by Koreans and Japanese, to structure the elements of the universe into a unified system of hierarchical interrelations.

In the field of music — which Confucius regarded as a crucial means of maintaining the harmony of the cosmos — the fundamental criteria of musical evaluation were reconsidered. As a result, the concept of “proper” music emerged, referring primarily to that which served Confucian ceremonial practices or accompanied the most refined forms of communication among noble men (*junzi*).

The sound of ceremonial orchestras during rituals in ancestral temples was expected to demonstrate a special balance of expression, as it was believed to possess magical power to influence the surrounding world. Ensuring the harmonious state of the cosmos, in turn, guaranteed human well-being.

The idea of harmony between humans and nature, on the one hand, and between individuals and society, on the other, formed the foundation of aesthetic concepts of beauty in both nature and the arts. During the Western Zhou dynasty, the ruler of Zhou created music whose structure corresponded to the form of rites and rituals.

Confucius, the great thinker and musician of the Spring and Autumn period (770 BCE — 476/403 BCE), emphasized that music must have a beginning and an end, highlighting its importance in maintaining social order. In the *Analects of Confucius* (chapter *Bayi*), there is a saying that “music begins when various instruments play in unison. As it unfolds, the instruments harmonize with one another and transition into a pure and beautiful tone” [1]. This expression reflects the aesthetic idea of musical art progressing from one state to another — for example, from calmness to culmination and back to calmness.

Confucius was deeply committed to the search for “perfect” (“proper”) music, known as the “Music of *Daxiao*”. A classical formulation of Confucius’s view of music as a means of educating people states: “A poem is born, ritual is established, and music is created”. This phrase implies that education should begin with poetry, continue with the study of rules and rituals, and be perfected through engagement with music. He believed that music plays a role in the moral cultivation of individuals and contributes to the development of their best human qualities [2].

Furthermore, Confucius held that music should serve the prosperity and strength of the state, as well as the happiness and well-being of the people, and that it could promote harmonious political governance. His advocacy for refined ceremonial music and rejection of secular music reflected the shared aspiration of the “Hundred Schools of Thought” of that era — namely, to cultivate people’s love for their families and their country.

According to the treatise *Lüshi Chunqiu*, imperfect music cannot contribute to the spiritual and physical development of a person. This statement reflects the noble character of musical aesthetics in pre-Qin China, which was grounded in the idea of “cultivating moral character, regulating the family, governing the state, and bringing peace to the world”. In the *Book of Music* (221 BCE), it is stated that the reason a ruler established rites and music was not to satisfy people’s sensory desires, but to teach them to restrain their good and bad emotions so that they could return to the correct path in life.

Confucianism influenced Chinese culture and the educational system for thousands of years. Even today, we witness the establishment of Confucius Institutes around the world. The combination of ritual and music is understood as the unity of emotion and reason. The emotion of acceptance is restrained, directed, and strengthened in such a way that it becomes a neutral emotion. As Confucius said: “Ritual, music, punishment, and governance — these are the highest means by which people’s hearts are unified and a way of governing emerges”. Music, as reflected in these words, becomes a tool for governing the people.

Confucius established the standard of Chinese musical aesthetics — one that rests on the notions of perfection and beauty. Literally, “beauty” refers to the expression of form, while “goodness” concerns the moral content that this form conveys. The perfection of beauty, therefore, lies not only in the decorative quality of external form, but also in the moral nature of its content. Confucius was a dialectical thinker in his exploration of aesthetic ideas. He emphasized the moral forces required for the progress of society.

The ancient Greek philosopher Plato also reflected on music in his work *The Republic*, arguing that in the education of the ideal citizen, priority should be given to music and physical training, for music purifies the mind and exercise strengthens the body [3]. Since the founding of the state, China has consistently used music as an educational tool within its national education system.

During the time of Confucius, a distinction existed between “proper” and “improper” sounds. Under the Wei and Jin dynasties, Ruan Ji’s treatise on music rejected the “sounds of Zheng and Wei” and upheld “the intention of former rulers to create music”. During the Sui and Tang dynasties, people remembered “ancient music” and respected “proper sound”. The ideas of the philosopher Zhu Xi regarding musical education contributed to shaping the role of music in the process of moral cultivation, a role assigned to so-called “elegant music”.

The character 樂 (yuè, music) and the character 樂 (lè, happiness) share the same written form but are pronounced differently. In many cases, however, their meanings coincide. The modern philosopher Tang Junyi wrote: “Music is something that people enjoy together. The joy of music lies in following shared emotions”. Thus, the aesthetic perception of music corresponds to perceiving life itself as beauty. The purpose of music is to strive for the daily joy of the sacred realm.

The ethical and philosophical interpretation of music is inseparable from the particular sensory pleasure it brings, as well as from the state of joy in life that music enables. The theme of goodness is also of great importance in traditional Chinese philosophy. When the happiness music brings is acknowledged, it becomes closely connected to the idea of “goodness”, emphasizing the unity of musical beauty and moral virtue — a fundamental principle governing human coexistence, reflected in Chinese ethical and moral norms.

On the one hand, the Chinese people value life in its fullness and do not consider human desires sinful. Taking pleasure in sound and color is natural to human nature. "Food, sexual desire — the greatest desires of human beings" (Book of Rites, 1861 — 1894, "Liyun"). But on the other hand, "There is no one who cannot eat, but few can appreciate flavor" (Doctrine of the Mean). Human beings cannot exist solely as biological creatures; as rational beings, they possess cultural rationality. From the Confucian perspective, people become cultured through education, and only "ritual and music" can express and reveal the degree of one's refinement and level of cultural development.

Thus, the principle known as "establishing through ritual and completing through music" became one of the most important aesthetic ideas of Confucianism and, for a thousand years, shaped traditional aesthetic norms that defined attitudes toward the art of music in China.

Ritual represents the behavioral norms of people within society. It is a general term that refers to an institutionalized system of rules and etiquette encompassing all aspects of human life — from everyday private affairs to public activities. Ritual must be coordinated with music, because music corresponds to the innate desires of human nature. "Music is the joy that is inherent in human nature. Music must be expressed through sound, movement, and silence. This is the Way of the human being... Therefore, people cannot endure existence without music" (Records on Music). Music accompanies the path of human life and human nature. Thus, on the one hand, human emotions and human nature must be regulated, and on the other hand, they must be followed and respected [4]. In this way, according to the Confucian ideal, ritual and music are combined, meaning that ritual and music harmonize the external and internal dimensions of human life.

The joy of sound and dance — pleasures of the ears and eyes — is transformed into inner emotional and intellectual joy. The word *lè* (joy) is frequently used in the Analects of Confucius to denote inner joy, with emphasis placed on its moral dimension. In the Analects, Confucius says: "There are three joys that are beneficial, and three joys that are harmful. The joy of proper ritual and music, the joy of speaking of the virtues of others, and the joy of having many virtuous friends — these are beneficial. The joy of arrogance, the joy of leisure and idleness, and the joy of feasting and revelry — these are harmful" [5]. The "realm of joy", according to Confucius, is a realm of joy imbued with moral spirit. Sensual delight, enjoyment of food and drink — this type of joy is harmful to morality, and Confucius strongly opposed it.

The essence of ritual rules and of rituals accompanied by music lies in preserving and strengthening harmony and stability within social order. On this basis, Confucianism formulates an important aesthetic principle: "music follows harmony", which has two meanings. First, harmony means that through musical education, one can cultivate inner feelings, allowing people to consciously adapt them to propriety in order to maintain social harmony and stability. Second, harmony encompasses physical, psychological, and interpersonal dimensions. Harmony between Heaven and humanity, as well as the gentleness and joyousness of music, must correspond to nature, humanity, and universal laws.

At the same time, Confucius distinguished between the goodness of musical content and the beauty of musical form — each possessing its own meaning while complementing one another.

Major Systems of Musical Temperament

In the Western understanding, music theory includes composition theory, harmony, counterpoint, and orchestration. The term “traditional Chinese music” has been widely used in Chinese musicology since the 1980s. In a number of academic works, a distinction is drawn between “traditional music”, which refers to the living musical practice transmitted from ancient times to the present, and the “musical tradition”, which refers to the theory underlying the creation of such music.

Clarifying these two concepts makes it possible to define the theory of traditional Chinese music as a systematic exposition of Chinese musical traditions and traditional Chinese modes of musical thinking, with active efforts made toward their practical application. Confucius’s original idea of comparing “beauty” and “goodness” in music illustrates that musical works may be beautiful in form, yet possess certain shortcomings or imperfections in content.

Modern Chinese musicologists are actively working to systematize the historically developed traditional theoretical systems of Chinese music. At present, they identify five theoretical systems — aesthetics, performance, musicology, notation, and structure — each of which has been given a certain academic rationale, primarily related to structural aspects.

For example, in the Introduction to the Study of the Five Theoretical Systems, it is noted that the structure of traditional Chinese music is divided into two categories: strophic structure and non-strophic structure, and it is stated that the composition of traditional Chinese music can be understood on three levels: strophic structure, melodic structure, and cadential structure.

When examining the principles of composition and the organization of the musical text itself, both short compositions and longer works — sometimes developing into full-scale suites — are used as examples.

“There are two types of suites: one is based on a melodic structure consisting of paired upper and lower phrases, which expand and contract, become denser and more elaborate, change in tempo, and so forth [6], forming what is known as a ‘plate suite’, composed of numerous upper and lower phrases. The other type of suite uses an already existing melody as the main material and organizes it in a particular way to create a ‘melodic suite’ consisting of several melodic sections”.

The term *yin* is used to denote the sound of the human voice, produced by a person. Sound is both the object of hearing and the result of hearing; therefore, that which comes from the human throat is called voice, while that which is perceived by the ear is called sound. Sound is an objective acoustic event, whereas voice is a subjective sound. The five tones of the pentatonic scale are subjective judgments rather than objective entities; hence they are referred to as sounds.

The eight timbres in the *ba-yin* classification system correspond to the eight materials used in the construction of musical instruments and serve as the basis for categorizing instruments according to these materials. In a general sense, the term “sound” is interpreted as “music that exists subjectively”, whereas “acoustic sounding” is understood as “music that exists objectively” [7].

For example, in Laozi’s expression *Da Yin Xi Sheng*, *Da Yin* is the subject and *Xi Sheng* is the predicate, meaning: “Great Sound manifests as rarefied (or subtle)

sounding". Sound, in this context, represents the subjective perception or judgment of the receiving subject after hearing the object referred to as the "great sound".

In the same way, the expression "sound without sorrow or joy" found in the famous treatise on the qin zither by the Chinese music scholar and philosopher Ji Kang refers to the subjective perception of music. It means that different people will experience different emotions of sorrow or joy when listening to the same piece of music. The refinement of ancient Chinese philosophical thought is truly remarkable.

The concept of the "Great (or Grand) Sound", which appears in several historical texts on Chinese music theory, was originally a metaphor used by Laozi in his Daoist writings, but later evolved into one of the key theories in Chinese musical aesthetics. It influenced subsequent musical compositions and served as a guiding principle, playing an important role in the development of an artistic style that emphasized the subtlety of string sound, the importance of the natural landscape surrounding the performer, as well as the tranquility and elegance of the musician's playing.

Interpreting Ji Kang's expression "sound without sorrow or joy", Shuhui argues that sound refers to an aesthetic perception experienced by the subject, rather than an objective property of the musical work itself, while "nothingness" refers to "impermanence". "No" thus means "no impermanence", whereas "sorrow" is an emotion with a concrete content. Therefore, "sound without sorrow" suggests that the listener is unable to derive a specific emotional experience or perception from the musical sound. Thus, the philosopher and musician Ji Kang not only does not deny that musical works may express emotion or mourning, but, in a certain sense, even confirms it.

In the traditional Chinese theoretical system, tones and their combinations were associated with a complex symbolism denoting various aspects of national teachings, primarily Confucianism, Daoism, and Buddhism. In the Yijing (Book of Changes), a theoretical foundation is given for the system of 64 hexagrams. Each hexagram is a symbolic figure composed of six horizontal parallel lines, either solid or broken. The solid line represents the bright principle of yang, while the broken line represents the dark principle of yin.

In Chinese thought, the entire world was perceived as the sum of various combinations of yin and yang, and because combinations of six solid or broken lines produce exactly 64 variants, the 64 hexagrams together constitute a symbolic model of the cosmos.

Throughout their history, the Chinese developed various systems for organizing musical tones. One of the earliest such systems was the Chinese system of temperament known as lü-lü. It is believed that China's own system of temperament was developed almost simultaneously with similar developments in Europe. According to legend, it was created by the great ancient musician Ling Lun at the command of the Yellow Emperor (Huangdi).

The foundation of this system is as follows: beginning with the fundamental tone Huangzhong (literally "Yellow Bell"), the remaining eleven tones were produced by sequentially reducing or increasing the length of the Huangzhong pitch pipe by one third. These pitch pipes (lü), originally made of bamboo, were regarded as the standard for correct tuning, and it is from them that the name of the system — lü-lü ("lü measurement system") — is derived.

As a result of these acoustic manipulations, a chain of ascending pure fifths and descending pure fourths was produced (comparable to Pythagorean tuning). When

all resulting tones are arranged in ascending order of pitch, they form a chromatic scale, which functions as a transpositional framework.

The principal tone (gong) of a mode corresponded to the pitch of the lü associated with a particular month of the year. The tones of the so-called “Chinese scale” were derived from the principal tone gong according to the same principle by which the eleven lü were generated from Huangzhong. The tone gong corresponded to the number 81 (the smallest number that, when used in the above algorithm, produces a sequence of five whole numbers — 81, 108 or 48, 72, 96 or 54, 64). Further calculations required rounding adjustments. When gong corresponded to Huangzhong, the five notes of the traditional pentatonic scale were simultaneously identical to the first five lü. These five tones carry numerous symbolic associations in many areas of life and Chinese worldview [8].

Taking into account the correspondence between the five tones and the five elements (wu xing), one may draw parallels between the order of tonal generation (the cycle of fifths) and their ascending order (the pentatonic mode), on the one hand, and the cycles of mutual generation and mutual overcoming of the five elements [9], on the other. This same principle of tonal relationships can also be observed within the entire lü–lü system.

The system of twelve lü is interconnected with various aspects of life in Chinese society, especially in the sphere of natural philosophy: the twelve tones correspond to the twelve months, and possibly to the twelve-year cycle (and thus the twelve zodiac animals), as well as to the twelve signs of the zodiac.

The very idea of returning to the beginning after passing through several stages of movement has long been popular in China, particularly in Daoist philosophical treatises and in Daoist ritual practices involving physical and mental exercises. For example, in the Yang school of Taijiquan, the practitioner completes a series of movements in all possible directions and ultimately returns to the very point where the sequence began. This symbolizes the circulation of qi throughout the human body, achieving harmony of all spiritual and physical forces.

The reduction and extension of the pitch-pipe length by one third — resulting in a rise of a perfect fifth or a drop of a perfect fourth — was interpreted as the alternation of yin (the dark, feminine principle) and yang (the bright, masculine principle).

According to the Daoist conception of the universe, the primordial substance yuan-qi consisted of two types of particles: yang-qi and yin-qi. The lighter yang-qi particles rose upward, while the heavier yin-qi particles descended. During the formation of the world, the descending yin-qi formed the Earth, while the ascending yang-qi formed Heaven. Thus, the system of lü pipes symbolized the process of cosmic creation.

The very movement through the cycle of fifths carried deep symbolic meaning for Chinese theorists: the ratio of the perfect fifth — 3:2 — represented the relationship of sacred numbers. According to the Confucian treatise Liji (Record of Rites), 3 is the number of Heaven, while 2 is the number of Earth.

As a result of alternating upward and downward tone generation, the system divides into six male lü and six female lü (yang-lü and yin-lü). The six lü correspond to the six lines of a hexagram: the first male lü — Huangzhong — was associated with the initial line of the hexagram Qian, while the first female lü — Linzhong — corresponded to the initial line of the hexagram Kun [10].

The number six evokes additional associations, primarily within the Buddhist tradition. For example, the six virtues that allow one to overcome the ocean of suffering — samsara — are: self-restraint (renunciation), purity, perseverance, progress, concentrated awareness, and wisdom. A day, according to Buddhist cosmology, is divided into six periods — three daytime segments and three nighttime segments [11].

In Chan Buddhist texts, one also encounters the concepts of liu gen (six bases — sight, hearing, smell, taste, body, and mind), liu jing (six realms/limits), and liu shi (six consciousnesses) [12].

Furthermore, one may also observe in the use of the lü-lü system adherence to the Confucian principle of li (ritual): year after year, the same ceremonial music was performed on the twelve pitch steps.

However, as in the Western cycle of fifths, by moving upward in fifths (or in this case, by alternating a rise of a fifth and a descent of a fourth), the 13th pitch does not coincide with the 1st (or its octave). It exceeds it by the so-called Pythagorean comma — $531441/524288$ (23.5 cents). Chinese theorists simplified this discrepancy to the syntonic, or Didymus, comma — $81/80$ (22 cents). Thus, the circle of fifths remains open.

Consequently, might the system of twelve lü itself represent both the cyclic and the changeable nature of the cosmos? As we can see, despite its profound symbolic meaning, the lü-lü system was, in some ways, imperfect:

The system was not closed; therefore, at the start of the new year, it did not return precisely to Huangzhong, the tone that was supposed to initiate the next year.

Even within a given year, only the first eight of the twelve lü could serve as the gong (tonic) of a mode while preserving its structure precisely. All other transpositions required enharmonic adjustments, which inevitably distorted the modal structure.

All these factors encouraged continued acoustic and mathematical investigations among Chinese theorists in the field of musical temperament.

A more significant role in the history of Chinese music was played by the system of sixty lü proposed by Jing Fang. This system was adopted at the imperial court as the official one (although it was later abolished as excessively complex). Like the system of sixty-four lü, it was designed for a five-year cycle, but it followed the lü-lü tradition more precisely: it consisted of exactly five cycles of twelve lü each — no more and no fewer. Thus, to all symbolic correspondences associated with the lü-lü system, an additional “group of five” was added.

It is noteworthy that in designing the system of sixty lü, Jing Fang employed three complementary methods of calculation:

- shi — “substance”, expressed by six-digit numbers;
- lü — the length of the pitch pipes, expressed by three-digit numbers;
- chun — the length of the strings on the long zither, expressed by two-digit numbers [12].

The first historically documented attempt to create a system of equal temperament belongs to the 5th-century theorist He Zhengtian (370–447), who lowered the frequency of each tone in the lü-lü system so that the frequency of the 13th pitch was exactly twice that of Huangzhong [13].

The same problem of equalizing the intervals between tones was later studied by Luon Zhuo (543–610) and Wang Fo, but their calculations resulted only in approximate solutions.

A precise mathematical justification for equal temperament was finally formulated in the 16th century by Prince Zhu Zaiyu. He discovered the exact formula for equal-tempered tuning: constructing the ordinary chromatic scale (more precisely, ascending through twelve semitones) by sequentially dividing the number corresponding to the fundamental tone (Huangzhong) by the twelfth root of two.

However, despite the brilliance of his system, it did not find wide practical application: to this day, no musical instrument tuned according to this method has been found.

The reason for such prolonged and persistent investigation into systems of temperament may lie in the profound influence of Confucian ideology on Chinese society. The Latin word *temperatio* (“ordering”, “equalization”) is conceptually very close to what Confucianism sought to implement — in state governance, in social relationships, and in the regulation of human emotions and culture.

It was precisely the equalization and balancing of feelings within traditional behavioral norms, as well as the systematic “ordering” of the functioning of all social institutions — from the state to the family — that was likely reflected in Chinese musical theory. The Confucian tradition of ancestor veneration also played a role: nearly every new theory of temperament was formulated with explicit references to the “ancients” — the mythical rulers Yao, Shun, and Huangdi, as well as Confucius, Laozi, and others.

Laozi’s teachings, especially their natural-philosophical dimension (*Yijing*, and to some extent Zhuangzi and Liezi), promoted the idea that musical sounds could influence various natural processes — from the movement of celestial bodies to the circulation of vital energy (*qi*) in the human body. If, in the production of musical tones, the frequency of their vibration matched the frequencies of celestial bodies, the Earth, or the organs of the human body — thereby entering into resonance — one could, in principle, influence the functioning of both living and non-living nature.

One should also note the significance of music, as a non-verbal “language”, as a means of communicating with the Absolute — an idea characteristic of Chinese philosophical traditions, particularly the Chan Buddhist school. And, as is well known, for a means of communication to function as a true language, understandable to the one addressed, it must be structured in a particular way. This opened yet another pathway toward the emergence of systems of musical temperament — as a manifestation of structural order in general.

The Influence of Western Music Theoretical Principles

During the reign of Emperor Shenjong of the Ming Dynasty (1572–1620), Western musical culture began to exert a noticeable influence on Chinese music. It is important to note the impact of Christian church music on Chinese musical culture, as well as the musical education provided in church schools in China starting from the 19th century.

Missionary musicians, on the one hand, sought to study Chinese culture in order to strengthen the social effectiveness of their preaching, drawing primarily on Confucian teachings. On the other hand, they devoted themselves to translating Chinese texts in an effort to achieve the full integration of Western culture into all

classes, spheres, and groups of Chinese society. Among them, the Italian missionary Matteo Ricci stands out for his systematic efforts to introduce and disseminate Western musical instruments and Western instrumental music in China.

A tradition gradually emerged of translating the hymn texts of Christian music into Chinese. The main narrative texts include *The Poem on Nourishing the Heart*, *The Prayer for Glorifying God*, *The Poem of Praise to the Lord* by B. Henley and Fushan, as well as *The Hymn to the Lord* by Fan Tianxiang. It is worth noting that, in addition to these hymn collections written in Mandarin Chinese, there also exist collections compiled in regional dialects and performed in the languages of China's ethnic minorities. Examples include *The Divine Poem Centered in Banyan* in the Fuzhou dialect, *The Divine Poem Centered in Chao* in the Chaoshan dialect, *The Divine Poem Centered in Xia* in that dialect, as well as hymn collections still sung today by the Blang (Brown) and Lisu ethnic groups in Yunnan. These hymns continue to be performed among the Bulang and Lisu peoples in Yunnan.

What may appear to be a simple adaptation of sacred music in fact raises profound cultural questions, revealing the complex interaction between Chinese and Western musical cultures, as well as the creation of so-called Western hymn models performed in the Chinese language [14].

By the beginning of the 19th century, China had already developed and theoretically substantiated centuries-old, extraordinarily rich traditions in literature, painting, architecture, theatre [15], and applied arts, represented by a wide variety of schools, forms, and genres.

A characteristic feature of Chinese musical culture is its multi-layered nature, which is connected both to the complex social stratification of Chinese society and to its ethnic diversity. At the two extremes of this spectrum stood, on the one hand, the developed classical tradition, and on the other, the archaic forms of music belonging to isolated ethnic minorities, often geographically remote.

Although rooted in deep antiquity, Chinese musical culture by the 19th–20th centuries was, in comparison with European culture, significantly less structurally organized. Individual musical phenomena were sometimes disconnected from the general trends taking place within the country's musical culture. Added to this were limited technological resources and a significant lag in the development of mass media.

Beginning at the turn of the 18th–19th centuries, significant changes took place in Chinese musical culture, driven by the partial transformation of social culture and the influx of foreign influences. The role of urban culture increased (one of its most important components became the traditions of the national intelligentsia), and special state institutions responsible for managing cultural affairs were established.

Commercial elements gradually penetrated musical life, and new forms and genres emerged that were intended to entertain the urban public. In the early 20th century, new technological inventions — radio and phonograph recording — began to play a considerable role. Many musicians from the national intelligentsia studied Western music in European conservatories and incorporated the principles of Western musical writing into their practice.

The question of the future development of national music was largely resolved in favor of borrowing general features and specific elements of the European musical tradition. This interest in Western music can also be explained by the fact that, ever since Europeans first established a presence in China, European music had been regarded as more prestigious than traditional Chinese music or the music

of the high classical tradition. Choral singing, performances of Western European operas, and domestic music-making modeled on Western practices attracted the privileged social classes of China, who considered it their duty to cultivate what they viewed as a more progressive form of culture, thereby emphasizing their distance from the lower social strata.

Many of them sent their children to study in Europe. Consequently, progress in national art was understood primarily through the influence of Western musical achievements. Composer creativity, Western-style musical education, and training in Western music theory — including European notation — became increasingly widespread within Chinese musical culture.

In major Chinese cities such as Beijing and Shanghai, symphony orchestras and Western-style opera companies began to emerge. A tendency also developed whereby traditional forms of Chinese music came under the influence of European musical traditions. This led to the formation of so-called hybrid forms within the musical culture of major Chinese urban centers. By the 1920s–1930s one can already speak of significant competition between national and Western musical traditions. All these developments took place before the founding of the PRC (that is, prior to 1949).

The work of the Russian-born pianist and composer Alexander Tcherepnin played an important role in shaping the Chinese school of music theory. During his travels across China in the 1930s, he was deeply impressed by traditional Chinese art and developed a profound interest in Chinese music and culture. He studied with Qi Rushan, a performer of Beijing opera, and adopted the Chinese name Qi Erpin. Acting as an emissary of Chinese culture, he travelled extensively between China and foreign countries, performing, teaching, and participating in various musical and cultural events.

In May 1934, he designed and financed a campaign aimed at promoting piano music with Chinese characteristics, organized at the Shanghai Conservatory. This event significantly influenced the development of modern Chinese musical culture and the definition of the contemporary Chinese musical school. In organizing the competition, the jury he selected included Xiao Youmei, Huang Zi, and himself. According to the rules, a participant had to be Chinese and the submitted composition had to be based exclusively on Chinese themes. A conservatory student won first prize for the piece *Piccolo for a Shepherd Boy*. For the first time in history, a competition offered Chinese composers a new path for developing piano music rooted in Western music theory while simultaneously establishing an aesthetic framework and working paradigm for a modern, authentically Chinese musical school.

Thus, Chinese musicians gained access to foundational academic study of Western music and compositional techniques. This facilitated professional acquaintance with modern Western music of the twentieth century, including works by Rachmaninoff and Ravel [16]. Tcherepnin believed that Chinese musicians should follow their own path and continue their national rhythmic and melodic traditions, creating music with distinct Chinese characteristics in order to enrich world music. He introduced Chinese musicians and their works to Europe, frequently performing and publishing them. At the first “Prague Spring” International Music Festival, he presented to the world a number of Chinese musicians and compositions, including Li Xiangmin, Zhou Xiaoyan, He Luting, Lao Zhicheng, Liu Xuan, and Jiang Wen. At the same time, his soprano adaptations of Yunnan folk songs, such as *Peach Blossom Shop* and *Apricot Blossom Village* and *Spring Sleeps but Don’t Wake Up*, made a strong impression on the European music scene, marking the emergence of Chinese music and Chinese musicians onto the world stage.

In the second half of the 20th century, China faced a number of challenges whose solutions determined the future of the young republic's cultural development. These included issues of state policy and governance in the sphere of musical culture, the organization of musical institutions, ideological and national orientation in music, attitudes toward musical heritage, the role of composition, problems of mass culture, international contacts, and more. The early years after the founding of the PRC were marked by a strong cultural upsurge: new educational institutions, research institutes, museums, theatres, and music schools were opened; propaganda ensembles were created; and the All-China Association of Workers in Musical Culture was established under Lü Ji, He Luting, and Ma Sicong. Three conservatories — in Beijing, Shanghai, and Tianjin — began operation, along with four music institutes in Wuhan (Hubei), Shenyang (Liaoning), Xi'an (Shaanxi), and Chengdu (Sichuan), as well as an Institute of Folk Music Studies in Beijing and music colleges in Dongbei and Guangzhou. These initiatives were highly promising.

However, according to Mao Zedong, every area of culture had to serve political goals. The function of art was reduced to political propaganda.

In the 1950s, numerous debates arose about the future development of Chinese culture, stimulated by the proclamation of the policy "let a hundred flowers bloom, let a hundred schools of thought contend", which allowed diverse viewpoints to be expressed in various forms, except for explicitly counter-revolutionary ones. This was a period of intense discussion among poets, writers, filmmakers, artists, musicians, and theatre practitioners.

In the second half of the 20th century, the West succeeded in constructing an alternative image of contemporary Chinese music within the global cultural context. During this period, traditional Chinese music was increasingly questioned for its modern relevance. Thanks to the work of Shen Xingong, a strong cohort of musicians representing the so-called New Music emerged in China, systematically promoting a modern narrative of Chinese musical identity. Their practice was based on modern musical education, primarily grounded in Western systems. Dissatisfied with the state of national music education, many Chinese musicians undertook study tours abroad, focusing especially on music as a discipline and observing school music education in detail. As a result, Western major/minor song repertoire gradually became incorporated into the Chinese educational system.

Modern Western civilization is a powerful and influential force in global culture, and the Chinese have much to learn from it. Studying and internalizing its theoretical methods, modes of thinking, aesthetic experience, rules, and other "civilizational essences" became both a social task and a complex cultural responsibility for practitioners of the modern Chinese musical school. Among them, the creative work of Zhao Yuanren stands out. Zhao attempted to explore how Chinese musical imagery could be expressed within a multicultural context in his organ piece *Hua Liu Ban* and the *Waves of the Xiang River*. The work is based on two traditional Chinese folk melodies, *Six Versions of the Flower* and *Waves of the Xiang River*, creating an unprecedented synthesis of traditional Chinese music with the sonorities of a Western organ. Its distinctive feature is the use of vertical polyphony, whose value lies in its ability to combine Western functional harmony with the pentatonic coloration of Chinese melody.

It is known that the ruler of the Qing state left his mark on musical history with his song *Journey of the Great River to the East*. The lyrics are taken from a poem by Su Dongpo, while the melody is original. This new musical language, created by the

ruler's talent and insight, represents the first Chinese example of an art song using Western harmonies.

The achievements of Xiao Youmei are also well known. A true advocate and practitioner of Chinese musical education, he inaugurated the use of Western theoretical methods in large-scale instrumental compositions with Chinese national characteristics through his work *New Dance of the Neon Dress*. Similar contributions were made by other composers: Li Cihai, who incorporated the so-called “pipa chord” (based on the Chinese pear-shaped lute); Luo Zhongrong, who combined pentatonicism with the twelve-tone *lü* system; Wang Jianzhong, who studied the interaction of the linguistic tonal system with musical structure; and Du Mingxin, who experimented with combining Western major-minor tonality and pentatonic linear melody.

Chinese musicians eventually realized that the incorporation of foreign musical discourse ultimately depended on their own choices. Thus, the composer Qu Wanhua sought to blend major seconds layered over diminished fifth triads within pentatonic structures; Shi Wanchun employed continuous streams of parallel major ninth chords; Tan Dun's *Three Note Interlude* uses a “raspy timbre” produced by dissonant tones imitating the human voice. This body of work represents the formation of a movement in 20th-century Chinese music symbolizing the interaction between East and West.

The emergence of the Chinese musical tradition on the global stage is symbolized by *Chinese Flower Drum*, a work for violin and instrumental ensemble composed in 1911 by the American composer of Austrian origin Fritz Kreisler. When writing the piece, Kreisler had never visited China; his inspiration came solely from his fascination with Chinese music. In the 1920s, this interest deepened when he observed performances by Chinese instrumentalists in San Francisco's Chinatown during a music festival. His acceptance and study of Chinese musical styles were exceptionally valuable for that period. The West's strong economic power and elevated international status fostered a sense of superiority toward the “backward” East; thus, most publications about the San Francisco festival supported Eurocentric views and belittled Chinese art.

Unfortunately, even today, Western musicians' interest in Chinese music is sometimes limited to exotic curiosity — legendary stories about the long qin zither, descriptions of the “five tones”, the “eight timbres”, and similar topics. For China itself, however, interest in Western culture has always offered an opportunity to seek new ideas for cultural transformation — a desire tied, to some extent, to China's aspiration to integrate its musical culture into the global discourse.

Conclusion

In Chinese musical art, several major spheres of traditional music can be distinguished: instrumental performance (solo and ensemble), the chanting of poetic texts accompanied by instruments, and theatrical musical traditions.

When describing the modern Chinese orchestra of traditional instruments, it is particularly interesting to trace the evolution of the orchestral institution over an extensive historical period — from its earliest origins to its contemporary form. Chinese legends recount that the Yellow Emperor, who lived approximately between 2697–2598 BCE, used all available and officially recognized means to restore bodily and mental harmony after many years of rule, among which his orchestra of “bells and drums” held a distinguished place. Among the instruments

most common during the Shang–Yin dynasty (1600–1027 BCE) were various drums, flutes, and sounding stone slabs (stone chimes). Records indicate that the ceremonial orchestra at the beginning of the Zhou dynasty (Western Zhou, 1027–771 BCE) included two large bronze bells (bo), two smaller bronze bells (zhong), three large drums (jiangu), two small drums (li), one hand-drum (tao), two stone gongs (qing), four zithers (se), and three mouth organs (sheng and tang).

From ancient times, orchestras of various types were continuously active in China, accompanying official ceremonies and imperial entertainments. These ensembles were dominated by percussion instruments — idiophones and membranophones; later, aerophones (wind instruments) began to appear as well. During the Han dynasty (206 BCE — 220 CE), the role of aerophones and chordophones (string instruments) further increased. The establishment of trade relations with other countries introduced the Chinese to the musical cultures of foreign peoples. Under conditions of active cultural exchange, it was natural that foreign music and instruments exerted influence, which over several centuries led to changes in the composition of the orchestra.

The direct predecessor of the modern Chinese orchestra of traditional instruments is the southern ensemble Silk and Bamboo of the South (Jiangnan sizhu)—one of the brightest forms of traditional rural ensemble music. Its composition differed little from that of a divertimento orchestra and included both native and non-Chinese instruments. Bronze bells, stone chimes, and other ceremonial instruments gradually became “historical,” as they were associated with ritual performance.

Thus, entertainment-type orchestras included both national and foreign instruments. Plucked string instruments (foremost the pipa lute) dominated; bowed instruments appeared later but eventually became widely popular. Percussion instruments maintained rhythmic stability. Ensemble size varied: during the Tang dynasty, there were ensembles of hundreds or even thousands of musicians. However, due to economic decline and the crisis of the ruling dynasty, the number of musicians decreased, and ensembles grew smaller.

All traditional Chinese orchestras existing since roughly the mid-20th century can be divided into two large groups: in one group, the leading instruments are strings and winds; in the other, percussion and winds. Although the instrumentation of these groups differs in certain details, most string-wind orchestras include one transverse and one vertical flute, a mouth organ, a bowed string instrument, two or three lutes, and one or two small percussion instruments, whose players often serve as ensemble leaders. The second group, highly individual in makeup, includes oboe-type instruments, flutes, mouth organs, and numerous percussion instruments. These orchestras are further subdivided into wind–percussion ensembles and pure percussion ensembles (drums and gongs). If other instruments are used, they are considered supplementary — especially in ensembles accompanying theatrical performances. For example, Peking Opera uses two orchestras: the civil (wenchang) and the military (wuchang) ensembles. Although musicians of both sit on stage together, they do not perform simultaneously: the civil ensemble features strings and winds, while the military ensemble includes gongs and drums.

By the 19th and early 20th centuries, the influence of Western culture was strongly felt in China. The vernacular literary language baihua (based on spoken language and accessible to the masses) spread; Western literary works were translated into Chinese; the first foreign-language school was opened; and the first groups of Chinese students departed to study in Europe. The Western system of musical education — already tested in Japan — was introduced into China as well.

Young Chinese who had studied in Europe returned home attempting to transform traditional Chinese music in the style of the Western classical tradition. In 1919, a music department was established at Peking University, where classes followed the curricula of European conservatories. Gradually, European music secured a more stable position in China, even gaining its own cultural niche. The process was reinforced by the emergence of a particular stratum of Chinese intellectuals who regarded traditional Chinese culture as the main obstacle to progress and saw salvation for the nation in rejecting traditional values.

Fortunately, traditional types, genres, and styles of Chinese music were not removed entirely from the educational system. In the 1920s, a department existed at Peking University where students were instructed in pipa, qin, and erhu. In 1927, the prominent cultural figure Xiao Youmei founded the Shanghai Conservatory, which combined Western and Chinese principles of musical education. The conservatory included departments for both traditional instruments and Western piano, violin, and composition. In the Chinese arts system, the term modernization gradually became synonymous with Westernization. Students trained in Western musical style attempted to refine the styles, intonations, harmonies, polyphony, timbres, and ranges of traditional Chinese instruments.

For traditional musicians, the model of an instrumental ensemble became the large European symphony orchestra. Many Chinese lamented that in recent years Chinese classical music had been mostly solo-based, with only rare ensemble performances of up to seven musicians. Even those who described their performance as “ensemble” in fact played in unison, from memory, without using notation. The renewed interest in a new type of orchestra stemmed from the fact that small traditional ensembles no longer met the needs of a rapidly democratizing cultural life.

The period of formation of the modern Chinese orchestra of traditional instruments dates to the 1930s–1940s. All sources confirm that this orchestra evolved directly from the Jiangnan sizhu style. The first modern orchestra of traditional instruments was formed in Nanjing for broadcasting traditional music on Chinese radio (1935). In 1939, the radio station’s music department created a national orchestra of 14 musicians and a Western-style orchestra of 28 musicians. Each had its own repertoire and performed separately. One of the organizers, Gao Qiming, wrote that in 1942 the traditional orchestra included 20 musicians. Later it was renamed the Chinese Orchestra of the Central Radio Station.

As noted earlier, the orchestra was modeled on the European symphony orchestra: the yuehu or nanhu served as violas; dahu as cellos; dihu as double basses; yangqin as piano; xindi as flutes; xiao as clarinets; bangdi as piccolo; haidi as oboe; the large guan as trombone; the suona as trumpet; muqin as xylophone; dagu as timpani; xiaoguo as snare drum; dianbo as cymbals; and pengling as triangle.

Over several decades, the modern Chinese orchestra underwent notable evolution, especially in its function: from domestic entertainment to concert artistic performance. Traditional ensembles still exist in some rural and small provincial areas, but the popularity of modern Chinese orchestras continues to grow, and their number far exceeds that of local ensembles. Alongside professional orchestras, thousands of amateur orchestras have been founded throughout the country. The first state professional orchestra was established in Hong Kong by Wu Peacheng in 1977. Musicians of this orchestra adopted Western notation, while most orchestras still used traditional numeric notation. By the 1980s, many Chinese orchestras had switched to Western notation.

In the 1980s, nine amateur Chinese traditional orchestras existed within the Chinese diaspora in the United States. These included: the New York Chinese Music Ensemble (est. 1961 by Zhang Zuannanyi, 28 members); the New York Traditional Chinese Art Orchestra (1975, founder Lai Xinhai, 7 members); the Seattle Chinese Music Club Orchestra (Washington State, 1979, founder Tao Chushen, 20 members); the Los Angeles Chinese Music Club Orchestra (California, 1979, founder Bruce Lu Chunchi, 7 members); and the Orchestra of the Institute of Chinese Culture and Art in Richmond, California (founder Yu Chunmo, 27 members), among others. However, as noted by E.V. Gradova, “contacts between the main (‘mother’) trunk of the tradition and its diasporic offshoots remain rather minimal... while the main trunk of the orchestral tradition evolved and underwent significant renewal, its ‘transplanted’ branch, situated in a foreign cultural environment, became increasingly conservative regarding the preservation of traditional forms.” Thus, researchers note that in the United States one may still encounter masters performing in early 20th-century instrumental styles no longer used in China.

Today, China’s economic development is extremely dynamic. However, on the path toward the industrialization of traditional Chinese music, specialists must not only produce high-quality scholarship but also focus on transforming research results into practical application. A promising recent development in this respect is the nationwide “Lecture Hall” program, whose main goal is to disseminate China’s traditional culture and interpret it within the context of the contemporary global cultural landscape. In our opinion, in the era of digital information, it is crucial to create a platform that allows professional musicians to step onto the contemporary stage and reinterpret traditional musical forms and genres in ways relevant to modern audiences. This would significantly support both national heritage and the development of traditional Chinese music.

Traditional music also draws inspiration from other art forms, including audiovisual and dance arts. If we take modern rap music as an example, younger generations may be intrigued to learn that something similar actually emerged in China as early as the Tang dynasty (618–907). Its likely immediate predecessor was the tradition of chanting Chinese poetry “melodically”, shaped by the rich tonal–intonational structure of the Chinese language. After a period of evolution, during the Song dynasty (960–1276), this tradition adopted well-known elements of poetic ci culture, forming a relatively new type of vocal melodic line. During the Jin and Yuan dynasties, the poetic style zhugongdiao became a widely spread form of chant-declamation, typically performed solo and accompanied by percussion instruments. In the Ming dynasty, the number of performers increased. By the Qing dynasty, chant-declamation reached unprecedented development. Thus, this tradition is by no means a modern innovation but can rightfully be considered a national form deeply rooted in Chinese cultural history.

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Проблемы современного развития традиционной музыки Китая: часть 1

Лифу Чжан , Е.В. Градова  

Финансирование. Настоящее исследование не получало внешнего финансирования.

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Аннотация. Вопросы внешних влияний и национальной идентичности в формировании и развитии современной китайской музыкальной практики приобрели значительную актуальность на государственном уровне. В последние годы ученые в Китае все чаще отмечают, что традиционное музыковедение не следует ограничивать в плане использования мировых методов и направлений музыкальной науки. Традиционная музыка является важной частью китайской культуры и характеризуется разнообразием и сложностью. Рассматриваются особенности музыкального мышления в традиционной китайской музыке, прослеживается эволюция, а также анализируется влияние этих традиций на современных композиторов. Кроме того, на основе исторических источников и классических китайских музыкальных произведений предлагаются возможные пути будущего развития китайской национальной музыки.

Ключевые слова: Конфуций, «Записки о музыке», А. Черепнин, Шэнь Синьгуан, Сяо Юмэй, люй-дуй, янь-ци, инь-ци, пентатоника, китайская опера, традиционная музыка Китая

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Review / Обзорная статья

In Search of Russian Identity: Philosophical Themes in the Works of V.N. Belov

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Abstract. In recent years, increasing attention has been devoted to the issue of Russian identity. In this context, there is a growing need for a detailed exploration of the phenomenon of Russian identity under contemporary conditions. This article examines Russian philosophy as a key factor shaping Russia's national identity. Special emphasis is placed on the works of Professor Vladimir Nikolaevich Belov, a leading scholar in the history of Russian philosophy.

Keywords: Russian philosophy, Russia, national identity, history of Russian philosophy, Russian Neo-Kantianism, German Neo-Kantianism, V.N. Belov, V.E. Sesemann, B.V. Yakovenko, specificity of Russian Neo-Kantianism

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Introduction

Vladimir Nikolaevich Belov is a well-known Russian philosopher whose works are devoted to the study of the history of Russian philosophical thought, its foundations and distinctive features, as well as its place within the global historical-philosophical process. His scholarly research covers a wide range of issues related to the emergence and development of Russian philosophy — from the period of Ancient Rus' to the present day.

His academic interests are extensive and include the history of Russian philosophy, philosophy of culture, religious philosophy, and Neo-Kantianism. He is the author of more than 500 scholarly works. Professor Belov is considered the leading Russian specialist on the history of the Marburg School of Neo-Kantianism. In his studies of Neo-Kantianism, he consistently argues that the development of this movement at the turn of the 19th and 20th centuries was not a dead-end stage in the evolution of Kant's transcendental criticism, but rather gave both the European and Russian philosophical traditions a powerful creative impulse. In essence, it became the starting point for many contemporary philosophical schools and currents. In particular, Neo-Kantianism influenced the formation of the philosophy of culture, which subsequently acquired independent disciplinary status, as well as the philosophy of dialogue — unthinkable without the philosophical inquiries of Hermann Cohen.

In 2002, V.N. Belov organized in Saratov the first international conference in Russia dedicated to the philosophy of Hermann Cohen. He also produced the first Russian translation of one of the foundational works of the founder of the Marburg School, Kant's Theory of Experience (Kants Theorie der Erfahrung),

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a publication supported by a grant from the Goethe-Institut. Belov served as the Russian coordinator (with Professor A. Poma representing the Italian side) of an international academic exchange project between the universities of Saratov and Turin titled “German and Russian Neo-Kantianism” (2003–2008), involving students, postgraduate researchers, and faculty members.

Materials and Methods

The empirical basis for this study consists of monographs, scholarly articles, and published lecture courses by Professor V.N. Belov, which collectively reflect a broad range of issues in Russian philosophy, Neo-Kantianism, and the problem of national identity.

Methodologically, the study is grounded in a comprehensive approach that includes historical-philosophical analysis, comparative methodology, and a hermeneutic framework. The conducted analysis made it possible to identify the key directions and arguments presented in the works of V.N. Belov concerning the issue of Russian identity and to formulate the principal conclusions relevant to this topic.

Results and Discussion

The monograph by V.N. Belov, *Essays on the History of Russian Philosophy*, opens with a question that is, on the one hand, seemingly simple, yet on the other profoundly complex: What is philosophy? In what ways does it differ from German, Chinese, or English philosophical traditions? If we consider the division of philosophy according to a historical and geographical principle, scholars typically distinguish between Eastern and Western traditions. The Eastern tradition is characterized by an evolutionary trajectory of development without abrupt paradigm shifts, unlike the Western tradition. Moreover, Eastern philosophy lacks such systematic components as ontology, epistemology, logic, ethics, and aesthetics; instead, it is focused primarily on the study of the inner world of the human being.

The Russian philosophical tradition — if viewed geographically — occupies an intermediate position and embodies features of both East and West. Many Russian philosophers, among whom Vladimir Solovyov holds a prominent place, regarded the unification of Eastern and Western ideas as the foundational principle of Russian philosophy. However, Carl Jung, the well-known philosopher and psychologist, believed that such a synthesis was impossible, arguing that Russian philosophy was still too young and not yet capable of fully realizing this synthesis.

Another thinker, Andrei Bely, held a different view concerning the cultural-philosophical space of Russia, seeing it as an arena of constant struggle between spontaneity and rationality. He argued that in the soul of the Russian people, Eastern spontaneity and European civility are in perpetual conflict. This internal tension gives rise to crises and strains that manifest themselves in literature, art, and public life. Instead of a mechanical synthesis of East and West, Bely proposed a profound internal transformation of consciousness that would lead to genuine unity and the harmonization of opposing principles.

Professor Belov, addressing this question, proposes a more effective approach:

We would venture to express what seems to us a more productive and realistic — though thus far insufficiently justified — idea: that Russian philosophy, while Western in its essence, may serve as a bridge to Eastern wisdom [1, p. 6].

The question of the national differentiation of philosophy represents a highly complex field of inquiry. It is important to recognize that any national philosophical tradition implicitly contains both external and internal borrowings. What is of primary significance here is not merely the existence of these borrowings, but the conditions under which they were adopted and the ways in which they influenced the subsequent development of culture, science, and society.

If we examine the historical roots that exerted decisive influence on the formation of the Russian philosophical tradition, it is essential — following Professor Belov — to highlight the following:

In the process of the genesis of Russian philosophical thought, two sources come into contact: paganism (the internal source) and Byzantine Christianity (the external source). Their interaction is characterized by mutual complementarity, though not without contradictions and confrontation. As a result of this encounter, the Orthodox variant of Christianity emerges, which in its mystical-ascetic tradition would later, at more advanced stages of philosophical development, confront the external influence of Western philosophy and theology in a more conflict-laden form [1, pp. 18–19].

Indeed, without attention to this historical fact, further research on Russian identity would be impossible.

In *Essays on the History of Russian Philosophy*, Vladimir Belov emphasizes:

It would be incorrect to assume that the philosophical thinking of Ancient Rus' was entirely devoid of abstraction or avoided engaging with conceptual and categorical frameworks. Its inquiry into anthropological issues was particularly productive. The human being — his moral qualities, his capacity for transformation and salvation, which define both his social and personal spheres of existence — had already become the central problem of Russian philosophical thought by the 10th-12th centuries. Whereas the historical human being remained bound to the cultural tradition from which he emerged, requiring a pragmatic perspective, the problem of the human as such, independent of national-cultural belonging, was approached through the Eastern Christian viewpoint, itself shaped by the national peculiarities of Orthodox formation [1, pp. 37–38].

A study of the historical stages of Russian philosophy reveals an impressive diversity of currents that significantly influenced its development. On the one hand, the pagan cult; on the other, the adoption of the Orthodox branch of Christianity. On one side, the logic of the West; on the other, the spontaneity of the East. Throughout every historical period, Russian philosophy was marked by this inner conflict and tension — a crucial impulse for its enduring quest for self-definition.

In many of his works, V.N. Belov argues that the formation of modern philosophy is rooted in the creatively fertile soil cultivated by Russian thinkers of previous epochs. In particular, he highlights the contributions of the Russian Neo-Kantians: V. Vvedensky, V. Sezemann, B.V. Yakovenko, S.N. Hessen, S.L. Rubinstein, and A.V. Veideman.

Interest in Neo-Kantian studies is reflected in numerous publications by foreign scholars. A. Noras, C. Krijnen, H. Holzkamp, J. Stolzenberg, K.-W. Zeidler, L. Bertolino, T. Nemeth, A. Poma, and E. Gamba are among the contemporary researchers who reaffirm the enduring significance of Neo-Kantianism and post-Neo-Kantian thought. Professor Belov emphasizes the particular attention paid by Western philosophers to the works of S.I. Hessen on pedagogy and the political-legal development of social institutions. A substantial group of scholars in Italy, Poland, and Germany has studied Hessen's works since the mid-20th century.

Belov stresses:

Given the evident and fully justified rise of interest in the history of Russian Neo-Kantianism in recent years — not only on the part of domestic researchers but also from our Western colleagues — it is worth turning to one important aspect in the general characterization of this school as an independent and productive branch of Russian philosophy. Namely, it is important to note the sufficiently deep and stable influence of Russian Neo-Kantianism on Western philosophical and public thought [1, p. 203].

The ongoing work of Western scholars on the archival materials of Russian Neo-Kantians continues to reveal new dimensions of their intellectual legacy. Biographical details are being clarified, numerous facts of their active interaction with the cultural milieu of the countries of their emigration have been discovered, and earlier published yet long forgotten or rare works of Russian authors are being reintroduced into academic circulation [1, p. 214].

Neo-Kantianism, which emerged in Russia in the second half of the nineteenth century, developed as an attempt to revive interest in Kant's critical method. It influenced many areas of philosophy, including ontology, epistemology, and ethics, as well as various sciences — mathematics, physics, and psychology — given Kant's focus on the limits of cognition and the conditions for the possibility of scientific knowledge. In Russia, Neo-Kantianism evolved alongside other influential movements, such as Marxism and religious philosophy. Yet the contribution of the Neo-Kantians to the development of philosophical thought cannot be overstated. The Marburg school brought new standards of scientific rigor and systematicity into Russian thought, while the Baden school fostered the development of axiology as an independent field.

In Russia, Neo-Kantianism acquired unique features, intertwining with the idea of national distinctiveness and simultaneously serving as an intellectual bridge between Russia and Europe. History has preserved numerous testimonies of fruitful scholarly friendships among the Neo-Kantians. An important milestone of such cooperation was the publication of the international journal *Logos*. Russian Neo-Kantians firmly resisted subordinating philosophical thinking to religious doctrine (i.e., teleologism and mysticism) or scientific theory (i.e., positivism or scientism), insisting instead on the autonomy and highest sovereignty of philosophical thinking. Through this, the characteristically Russian spirit of ontologism and the ongoing dispute between Slavophilism and Westernism were revitalized.

Boris Yakovenko, in his *Thirty Years of Russian Philosophy*, emphasized that one of the most significant neo-Westernist currents in Russian philosophy of the early twentieth century was certainly Neo-Kantianism.

Thus, we may conclude that Neo-Kantianism exerted substantial influence on both Western and Russian philosophy, enriching each and providing fertile ground

for the development of modern culture, science, and philosophical thought. According to Belov, Russian Neo-Kantians understood their philosophical mission as a necessary preparatory stage in the formation of the national philosophical tradition, serving as true mediators between European and Russian — and more broadly, social-scientific — thought [2, p. 29].

Exploring the reasons behind the emergence of Neo-Kantianism in Russia, Professor Belov draws attention to the fact that Russian mentality is more accustomed to extreme positions: either materialism, which absolutizes empirical reality, or religious philosophy, which absolutizes transcendence. Neo-Kantianism thus found itself caught “between two fires”. The tendency toward maximalism is deeply rooted in Russian culture. As B.V. Vysheslavitsev wrote in *The Eternal in Russian Philosophy*, Russian thinkers have always aspired to ultimate answers and the comprehension of the final meaning of existence.

Furthermore, in addressing the question of Russian philosophical identity, Belov notes correctly that the Russian philosophical tradition lacked a deep-rooted practice of epistemological debate. There were no native Descartes, Kants, or Hegels. Therefore, whereas in Western philosophy the spread of Neo-Kantian epistemologism was perceived as a defense of philosophical autonomy, in Russia such a “reduction” of worldview-oriented reflection to epistemology was often regarded as a departure from genuinely philosophical tasks. As P. Yurkevich, Solovyov’s teacher, famously wrote: “To know, it is not necessary to possess knowledge of knowledge itself”.

Specialist in Russian Neo-Kantianism Vladimir Belov writes:

The main characteristic of all Russian philosophy — its close interconnectedness with life and its aspiration to present philosophy not merely as a science of the a priori conditions of knowledge, but as a broader worldview — left its imprint on the thinking of Russian Neo-Kantians as well [1, p. 201].

Moreover, while examining the Neo-Kantian tradition in Russia, it is important to consider that many Neo-Kantians themselves doubted the Neo-Kantian character of their own philosophizing — the most striking example being A.I. Vvedensky, the founder of Russian Neo-Kantianism.

In analyzing the philosophical ideas of B.V. Yakovenko (1884–1949), Belov particularly highlights his critical disposition: “His motto could well have been a rephrasing of Descartes: ‘I criticize, therefore I am’” [3, p. 136]. A student of Heinrich Rickert and one of the editors of *Logos*, Yakovenko creatively reinterpreted earlier intellectual traditions and developed his own concept of pluralistic philosophy. His distinctive view lay in the assertion that only philosophy — standing at the summit of cultural development — can aspire to grasp genuine reality, i.e., Being.

Belov emphasizes Yakovenko’s invaluable contribution to the contemporary philosophical schools and currents of his time. Despite his critical attitude — or, more precisely, thanks to it — the Russian philosopher enabled the national philosophical tradition to discover new and fruitful paths for its development. Although Yakovenko devoted considerable attention to the history of Russian philosophy, he consistently argued that no national philosophy existed in a strict sense: “The Russian spirit has not yet lived through any tradition in full measure and has produced nothing genuinely original... Everything Russia has had and given in philosophy has either arisen from direct imitation, or from unconscious

submission to foreign influences, or from eclectic attempts to fuse several dominant foreign currents into one” [3, p. 713]. Even such seemingly pessimistic assessments constitute a productive challenge for future generations of scholars.

Assessing Yakovenko’s contribution to twentieth-century philosophical development, Professor Belov underscores that he was one of the creators of the “ontological turn,” alongside N.O. Lossky, S.L. Frank, and V.E. Sezemann. His critical stance toward many philosophical currents — including his opposition to the religious tradition (Berdyayev, Bulgakov, Florensky)—stands as a remarkable example of genuine philosophical rigor and unwavering commitment to intellectual integrity.

Thus, we may argue that the presence of such prominent figures in Russian philosophy underscores its distinctiveness and unique character.

Professor Belov has systematically examined the works of foreign scholars — T. Botz-Bornstein, D. Jonkus, L. Donskis, E. Tarasti, A. Sverdiolas, L. Anilionytė, and A. Lozuraitis — and has translated into Russian several key works by Vasily Sezemann, including *The Problem of Idealism in Philosophy*, *Plato’s Ethics and the Problem of Evil*, and *On the Problem of Pure Knowledge*. On this basis, he concludes that “V. Sezemann considered himself a man of Russian culture” [4, p. 414].

In 2022, under Belov’s supervision, a special issue of the *RUDN Journal of Philosophy* (Vol. 26, No. 1) was published, dedicated to the theme “The Exile of Reason: On the Centenary of the Philosophers’ Ship.” This issue explored how historical events shaped the development of Russian philosophy and culture. The study of the diverse philosophical activities of the Russian intelligentsia abroad once again raises the question of the features and specificities of Russian philosophical thought during this complex period. Thus, even far from their homeland, Russian philosophers continued to serve their intellectual mission faithfully. This historical fact stands as a vivid manifestation of Russian identity and national character, continuing to attract scholarly attention to this day.

Belov emphasizes:

Even during the harshest periods of Stalinist repression, when any deviation from the party line was brutally punished, P. Florensky, L.P. Karsavin, A.F. Losev continued to work in the conditions of concentration camps, while M.M. Bakhtin, E.V. Ilyenkov, and M.K. Mamardashvili continued to write ‘for the drawer’ [1, p. 495].

In examining contemporary Russian philosophy, Professor Belov emphasizes that it remains a relatively young and not yet fully consolidated phenomenon, which presents considerable difficulties for scholarly analysis. The factors that have shaped the modern philosophical tradition arise, on the one hand, from the intellectual legacy of the Soviet period, and on the other, from innovative transformations associated with globalization, digitalization, and the emergence of a new social order. These processes — both past and present — form a unique synthesis of new worldview orientations and conceptual frameworks.

The development of contemporary philosophy in Russia has been influenced by both Soviet philosophical thought and the Russian religious tradition. Belov stresses that a defining feature of Soviet-era philosophy can be described, drawing on M. Buber’s expression, as an “epoch of homelessness”. Despite the stringent censorship and ideological control characteristic of the Soviet period, Russian

philosophical thought nevertheless contained an implicit tension and latent disagreement with the regime.

As a specialist in Russian philosophy, Belov identifies three major stages in the formation of contemporary Russian philosophy.

The first stage represents a “mild” form of intellectual dissent from dominant ideology, exemplified by the philosophy of E.V. Ilyenkov.

The second stage is characterized by a more “rigorous” or radical philosophical stance, found in the works of A.F. Losev, M.M. Bakhtin, and M.K. Mamardashvili.

The third stage corresponds to the post-Soviet era, associated with such thinkers as S.S. Khoruzhiy, A.S. Panarin, N.P. Ilyin, A.G. Dugin, and Yu.V. Mamleev.

Among the most promising and productive areas of development within contemporary Russian philosophy are comparative studies in the history of philosophy, analyses of global challenges and the crisis of modern civilization, investigations of Russia’s role within these processes, as well as philosophical reflections on new scientific ideas and achievements, and the formation of the modern scientific worldview.

Professor Belov, in his exploration of Russian identity, emphasizes that debates on this topic have never truly subsided, and the contemporary geopolitical situation surrounding Ukraine, as well as global tensions more broadly, has only intensified scholarly interest in this issue. Many foreign researchers typically reduce the “Russian Idea” to the notion of an oppositional relationship between Russia and the West. However, Belov — who has devoted many years to a deep philosophical examination of this question — justifiably stresses that the genuine “Russian Idea” is critical not only of the West but also of its own “native soil” (*pochvennichestvo*), and even more so of the East. The authentic “Russian Idea” asserts only that humanity has not yet found its path and remains in a state of searching. For this ongoing search, a certain distancing from the seductive allure of the West is necessary — a kind of immunization against that allure. Thus, according to Belov, it is more accurate to speak not of Russia’s relationship only to the West, but rather of its relationship to both the West and the East. The intellectual productivity of such an understanding of the “Russian Idea” was demonstrated by Eurasianism. Emerging in the first half of the twentieth century among Russian émigrés, it became the only intellectually fruitful movement within the émigré milieu precisely because it proposed a synthetic solution to the long-standing conflict between Westernizers and Slavophiles [1, p. 546].

In analyzing the “Russian Idea”, it is important to take into account the major historical stages of Russia’s development that have had a profound impact on the formation of Russian identity. Belov identifies several such stages:

- the theological (Metropolitan Hilarion);
- the state-centered (Theophanes Prokopovich);
- the philosophical-cultural (Slavophiles and Westernizers, the school of Vladimir Solovyov, and F.M. Dostoevsky);
- the socialist (after the Revolution and during the Cold War);
- and the contemporary stage, marked by Western sanctions that have contributed to an unprecedented rise in patriotism [1, p. 547].

All these elements of the “cultural code” of the Russian people have found expression in diverse forms of creative activity among Russia’s thinkers.

A crucial and remarkably rich period in the development of Russian philosophy was the nineteenth century. The literary-philosophical culture of the Golden Age engaged profoundly with perennial philosophical questions concerning the essence and nature of the world, the human being, freedom, happiness, death, and immortality. Like the philosophy of its time, Russian poetry also addressed the challenges of social life, was imbued with a spirit of patriotism, and served as a “bell of freedom” advocating justice. A.F. Losev famously referred to literature as a “treasury of original Russian philosophy” [5]. In this sense, Russian literature and poetry may rightfully be considered integral components of the national philosophical tradition.

According to Belov, the main principles of the “Russian Idea” can be outlined as follows:

In politics — resistance to U.S. hegemony and affirmation of a multipolar world; the emergence of a new type of political figure — open, dialogically oriented, yet capable of defending national interests.

In culture — the elevation of culture into the principal stronghold of the “Russian Idea.” Russian culture becomes the symbolic medium through which, on the one hand, national and confessional insularity is overcome by demonstrating the universal significance of Russian cultural achievements, and on the other hand, the unique character of the Russian soul and Russian temperament is subtly expressed. Through culture, the “Russian Idea” acquires real embodiment in the notion of the “Russian World”, meaning a community united by a shared language and cultural values.

In education — an effort to counterbalance the Bologna system and to defend the humanistic dimension of education at all levels. Education is understood not merely as instruction, but as formation (in the sense of *о́браз*), with significant emphasis placed on patriotic upbringing. In secondary education, resistance to Bologna takes two primary forms: preserving and expanding instructional hours devoted to Russian language, literature, and history, and developing textbooks that emphasize the Russian literary canon and celebrate national heroism during critical periods of Russian history.

In religion — this remains, in Belov’s view, the most vulnerable dimension of the “Russian Idea”. The Russian Orthodox Church, despite being the largest of the Orthodox Churches, has yet to become a genuine leader of the Orthodox world and still struggles to establish stable and constructive forms of interaction with the state and with non-Orthodox religious communities. Paradoxically, the Russian Church often maintains more productive dialogue with Islam and Judaism than with other Christian denominations.

Conclusion

Russian philosophy constitutes a unique intellectual phenomenon that unites historicity, moral seriousness, and religiosity — aimed at seeking fundamental existential orientations for contemporary Russian culture and society. Russian philosophical thought is original, expansive, and diverse. In most of its schools and movements, exceptional attention is devoted to the theme of spirituality as a central characteristic of human existence. Russian philosophy embodies tremendous potential for humanism, morality, knowledge, and faith. It occupies a distinguished place within the global history of philosophy and possesses undeniable world significance.

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В поисках русской идентичности: философские темы в творчестве В.Н. Белова

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Аннотация. В последнее время все больше внимания уделяется вопросу русской идентичности. В связи с этим возникает потребность детального изучения этого феномена в современных условиях. Рассмотрена русская философия как фактор национальной идентичности. Особое внимание уделено работам по истории русской философии профессора В.Н. Белова.

Ключевые слова: русская философия, Россия, национальная идентичность, история русской философии, русское неокантианство, немецкое неокантианство, В.Н. Белов, В.Э. Сеземан, Б.В. Яковенко, специфика русского неокантианства

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