



# Common Security for Shared Development

**KOLOSOVSKIY YAN**

The CSTO and Counterterrorism  
in Central Asia

**SONG SHULI & CHENG ENFU**

A Political Economy Critique of the Globalizing  
Impact of the WEF

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Enlightenment, New Culture Movement,  
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BRICS Counter-Terrorism Strategy

**CONFERENCE REPORT**

WAPE 18th Annual Forum-Istanbul

Statement of the Council of SCO on  
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## Principles of Publication

At a time when U.S. ambitions for a unipolar world order have lost their appeal, a new order is taking shape thanks to the multipolarization of world politics and the acceleration of cooperation between developing countries, rejecting the globalism of imperialist states. Under these conditions, the new agenda of global cooperation should respond to the needs and aspirations of developing countries seeking joint development and solidarity under the guidance of public-driven projects. In particular, the Belt and Road Initiative (BRI) -put forward in 2013 by Xi Jinping, President of the People's Republic of China- provides a suitable opportunity and a sound foundation for the implementation of this new agenda of global cooperation.

BRI is an epoch-making move to re-implement the concept of the Silk Road, which dates back 2,000 years, to a time when China was immensely contributing to global prosperity and the development of trade and cooperation. The revival of this concept entails a much more comprehensive approach that also incorporates rail and sea transport, and digital systems.

BRI proposes to bring together over 60 countries across Asia, Europe, Africa, and Latin America –together accounting for nearly half of the world's gross domestic product– for prosperity and development at the initiative of China. Unlike the Western-centered world order, BRI seeks peaceful collaboration for improving global trade and production towards common goals for humanity. It firmly rejects crude imperialist exploitation. Two thousand years ago, the Silk Road was a conduit for the flow of gunpowder, spices, silk, compasses and paper to the world. Today, it offers artificial intelligence, quantum computers, new energy and material technologies, and space-age visions to developing countries. In addition, the New Silk Road provides incentives and opportunities for the development and implementation of bio-economic schemes in stakeholder countries against the threat of climate change and other environmental threats that bring the entire ecosystem to the brink of extinction.

Türkiye has a significant role –real and potential– in accelerating South-South cooperation. Türkiye is conveniently located as Asia's farthest outpost to the West. It assumes a critical position as a pivotal country on BRI's North-South and East-West axes. However, China's development and BRI's contribution to the future of humanity have remained to a large extent underrecognized and superficially evaluated in Turkish academia, media, and politics. This is mainly because Türkiye's academics, media professionals, and policy makers have been observing China using Western sources. In the same manner, China and BRI's other potential partners have been viewing Türkiye through a Western lens.

BRIQ has committed itself to developing an in-depth understanding of the present era, with a particular emphasis on the new opportunities and obstacles on the road to the New Asian Century.

BRIQ assumes the task of providing direct exchange of views and information among Chinese and Turkish academics, intellectuals, and policy makers. In the meantime, this journal will serve as a platform to bring together the intellectual accumulation of the whole world, especially developing countries, on the basis of the Belt and Road Initiative, which presents a historic opportunity for the common future of humanity.

BRIQ is also devoted to publishing research and other intellectual contributions that underline the transformative power of public-driven economies, where popular interests are upheld as the basic principle, ahead of individual profit. The fundamental tasks of BRIQ are to demonstrate how BRI can contribute to the implementation of this public-driven model, and to help potential BRI partners -including Türkiye- to realize their real potential.

BRIQ stands for the unity of humanity and a fair world order. It will therefore be a publication for the world's distinguished intellectuals, especially those from Eurasia, Africa, and the Americas: the defenders of a new civilization rising from Asia on the basis of peace, fraternity, cooperation, prosperity, social benefit and common development.



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BRIQ applies a double-blind review process for all academic articles.

Academic articles should be between 5000 and 9000 words in length, including abstracts, notes, references, and all other content. Please supply a cover page that includes complete author information, and a fully anonymized manuscript that also contains an abstract (200-word limit) and five keywords.

Book reviews should not exceed 1,000 words; review essays covering two or more works can be up to 3,000 words.

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Please contact the Editorial Board for interview proposals.

# EDITORIAL

## Common security for shared development

Three evils: terrorism, separatism, and religious extremism... Although they emerged in different periods on their own, they collectively constituted a triple package program devised by imperialism to impede the progress of developing nations. Throughout the 20th century, the “three evils” served as instruments of imperialism to obstruct national unification and cohesion in the emerging nations. Furthermore, imperialism has inverted the meaning of terrorism: National liberation wars and popular revolutions against imperialism were labeled as terrorism, whereas fundamentalist and separatist terrorist groups combating national states were characterized as “freedom fighters.” These organizations were either established directly by imperialism or endorsed and cultivated by it.

According to imperialism, Mustafa Kemal Atatürk, Nkrumah, Nasser, Gandhi, Nehru, Mao Zedong, Sukarno, and other leaders of the people’s revolution are classified as terrorists. In the imperialist centers, contemporary leaders who undertake measures to save their nation from hegemonism are labeled as autocrats.

Conversely, separatist or religious extremist terrorist organizations that oppose national states under the guise of “religious freedoms” or “ethnic rights” receive direct support from imperialism. Entities functioning in Asia and Africa, including the PKK in Turkey and Syria, the East Turkistan Islamic Movement (currently referred to as the Turkistan Islamic Party) in China, Jundullah in Iran, Tehrik-i Taliban Pakistan and the Baluchistan Liberation Army in Pakistan, ISIS Khorasan in Afghanistan and Central Asia, the Islamic Movement of Uzbekistan, and Boko Haram in Nigeria, execute operations under the auspices of imperialism in their respective territories, engaging in terrorist activities rooted in ethnic separatism and/or religious extremism.

Imperialism thus diminishes the national power and resources of developing nations, providing a handy justification for intervention in destabilized areas. Simultaneously, under the guise of “safeguarding ethnic and religious rights,” it enforces decentralized political agendas on developing nations, undermining national unity and state structures, primarily aimed at fragmenting its national states.

The remedy for the “three evils” is the advancement of multipolarity. Indeed, the PKK, among the largest terrorist organizations globally, was compelled to disarm as a victory of multipolarity. The established climate permits other terrorist organizations to disarm, thus enabling the target groups of ethnic or religious extremism to integrate with their nations and states.

In response to this political and ideological program of imperialist hegemony, the solution for the developing world is to develop security cooperation. The security collaboration established by the Shanghai Cooperation Organization, which started out in the latter half of the 1990s under the banner of “the fight against the three evils,” possesses a significant distinction from preceding platforms: Countries facing the same threats have convened and continue to convene for collaboration centered on shared development to guarantee collective security. Collaboration centered on shared development empowers emerging nations to strengthen together rather than depleting their resources through vicious and detrimental rivalry among themselves. This strategy prevents imperialism from interfering in the issues of developing nations.

This model’s primary strategy, well executed by the Shanghai Cooperation Organization, is emerging as a crucial element for security collaboration at both regional and global levels. This strategy is progressively being institutionalized within the BRICS, which is expanding and fortifying as the preeminent cooperative framework for emerging nations in the contemporary multipolar landscape.



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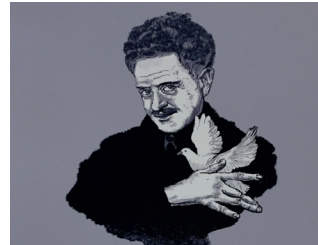
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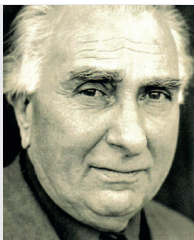
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# The Collective Security Treaty Organization and Counterterrorism in Central Asia: Assessing Russia's Role in Regional Security




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**KOLOSOVSKIY YAN\***

MA in International Politics

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## ABSTRACT

This study examines the efficacy of the CSTO in countering terrorism within Central Asia, with particular focus on Russia's institutional leadership. Grounded in RSC theory, the analysis investigates the organization's capacity to adapt to evolving security challenges, including the proliferation of transnational jihadist networks, emerging digital radicalization trends, and security issues persisting in Afghanistan and new challenges from Syria. Through qualitative case analysis and process-tracing methodologies, the research evaluates primary operational data and secondary sources to assess the CSTO's institutional responses. The findings demonstrate that the CSTO maintains robust conventional response capabilities through its Russian-dominated security framework, and systemic vulnerabilities persist in addressing contemporary hybrid threats. These include deficiencies in cyber counterterrorism measures, inconsistent intelligence coordination among member states, and weak deradicalization strategies. The study further reveals how shifting regional security dynamics, influenced by both internal developments and external threats, challenge the organization's traditional operational paradigms. Based on these findings, the research proposes policy recommendations.

**Keywords:** Central Asian security, counterterrorism strategies, CSTO, Islamic radicalism, Russia's foreign policy, transnational jihadist networks.

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## Introduction

THE COLLAPSE OF THE SOVIET UNION created a power vacuum in Central Asia, enabling the rise of radical movements that exploited weak governance and socio-economic instability. Among these, Islamist groups emerged as a significant security challenge, blending religious revivalism with ethno-political agendas. While some factions sought to unify the region's diverse societies under Islamic frameworks, others devolved into extremism, threatening both regional stability and global security.

Analyzing counterterrorism efforts in Central Asia, particularly through the Collective Security Treaty Organization (CSTO), needs a framework

that accounts for the region's unique security dynamics. The Regional Security Complex Theory (RSCT) of Barry Buzan and Ole Wæver provides a compelling lens, emphasizing how regional interactions, rather than global or domestic forces alone, shape security outcomes. According to the authors, Central Asia functions as a "weak sub-complex" within the post-Soviet space, where internal vulnerabilities (ethnic tensions, governance deficits) intersect with external threats (permanent instability in Afghanistan, transnational terrorism), limiting its capacity to ensure regional security independently. (Buzan & Wæver, 2003) As the key actor, Russia structures regional security primarily through institutions like the CSTO, which coordinates collective responses to these challenges.

The CSTO's counterterrorism approach aligns with RSCT's emphasis on interconnected threats, addressing the convergence of terrorism, organized crime, and drug trafficking through multilateral cooperation. Russia's dominant role manifests in CSTO operations such as joint exercises or the 2022 Kazakhstan intervention, reinforcing its position as a regional security guarantor. Contrary to early post-Soviet predictions of a "new great game" in Central Asia, such a scenario never fully materialized. Instead, Russia has consolidated its influence through multilateral institutions such as the Commonwealth of Independent States (CIS), the Eurasian Economic Union (EAEU), and the CSTO, alongside extensive bilateral agreements. Concurrently, regional powers prioritized stability over rivalry, exemplified by the Sino-Russian partnership institutionalized in the Shanghai Cooperation Organization (SCO), which promotes collective security governance as an alternative to unilateral hegemony.

Due today, Central Asia remains a Russian-led subcomplex rather than evolving into a "great power complex" or "super complex," constrained by its limited external engagement. Interregional interactions among Central Asian states operate within a security paradigm predominantly structured by Russia's institutionalized influence. While the United States (US) and China maintain security cooperation with Central Asian states, their engagement remains constrained by legal and operational limitations. Such activities contrast sharply with Russia's institutionalized regional presence, exemplified by its permanent military bases and established intervention mechanisms, as demonstrated by the CSTO's 2022 peacekeeping mission in Kazakhstan.

This study's interpretation of security relations between Russia and Central Asian states is

grounded in the conceptualization of amity-enmity patterns. Buzan & Waever (2003) argue that the regional security complex's evolution is conditioned by amity-enmity patterns among actors, meaning that regional dynamics are shaped by perceptions and relationships, not simply by power distribution. In the Central Asian context, Russia's enduring position as a security provider has created persistent patterns of amity that reinforce its institutional dominance, particularly through mechanisms like the CSTO and CIS, and in cooperation with other powers in the SCO.

This study employs qualitative case analysis and process tracing to examine CSTO counterterrorism operations through four analytical levels using RSCT. At the interstate level, the investigation focuses on domestic radicalization processes in member states and the perception of states as interconnected actors in shared security. The regional analysis assesses operational frameworks, including joint military exercises, intelligence-sharing mechanisms, and institutional basis, while identifying persistent gaps. At the interregional level, the analysis examines potential directions for enhanced security cooperation between the CSTO and other regional frameworks such as the SCO. Finally, the study evaluates normative alignment between CSTO operations and international counterterrorism regimes at the global level.

The research utilizes primary documents from CSTO archives and member states, supplemented by secondary sources. Thematic coding categorizes materials according to core RSCT variables, with particular attention to evolving threat perceptions and response patterns. Methodological triangulation strengthens validity by cross-verifying official statements with independent expert analyses from regional and international security specialists. This multi-source approach balances





On November 28, 2024, in Astana, the CSTO Collective Security Council held a session under the chairmanship of the President of the Republic of Kazakhstan, Kassym-Jomart Tokayev (Photo: CSTO website, 2024).

institutional narratives with operational realities.

The analytical framework situates CSTO operations within evolving geopolitical contexts, particularly examining two critical developments. The Taliban's governance in Afghanistan presents both potential avenues for security dialogue and persistent challenges regarding the expanding operations of ISIS and al-Qaeda in the country. This contextual analysis extends to assessing how extra-regional factors, including post-conflict stabilization in Syria and the strategic evolution of transnational jihadist networks, inform the CSTO's operational planning and threat assessment methodologies.

The analysis can encounter certain limitations. First, reliance on CSTO and Russian-published materials may introduce a pro-Kremlin bias, though this is mitigated by incorporating insights

from other sources. Second, language barriers pose a challenge, as some primary documents are available in Arabic, Central Asian, and other languages; therefore, specific findings may not be sufficiently covered. Third, the rapid institutional evolution of the CSTO and intense dynamics of relevant events mean that some recent developments may not yet be fully reflected in academic and analytical circles.

**Research Objectives:** This study aims to achieve three key objectives. First, it examines the socio-economic, historical, political, and external factors that drive terrorism in the region. Second, it seeks to evaluate the effectiveness of CSTO counterterrorism initiatives in Central Asia. Third, it assesses the extent of Russia's influence over Central Asia's security agenda through the CSTO.

### **Contemporary Islamic Radicalism in Central Asia**

The study of Islamic radicalism in Central Asia necessitates an examination of the links between historical Islamic traditions and modern ideological contestations. While scholars broadly acknowledge the region's Islamization between the 7th and 8th centuries (Еропов, 2014; Казанцев, 2016), there remains significant debate over how Soviet secularization and post-independence revivalism shaped contemporary radical movements. Traditional Central Asian Islam, rooted in Hanafi Sunni jurisprudence and Sufi practices, has historically exhibited adaptability to local customs (Khalid, 2007; Safranchuk & Makhmudov, 2024). However, this adaptability has been challenged by purist movements such as Salafism and Wahhabism, which reject both Sufi syncretism and secular governance (Meijer, 2009; Ro'i, 2000). This tension between pluralist and exclusivist interpretations of Islam frames much of the current discourse on radicalization in the region.

#### **Internal and External Drivers of Islamic Radicalism in Central Asia**

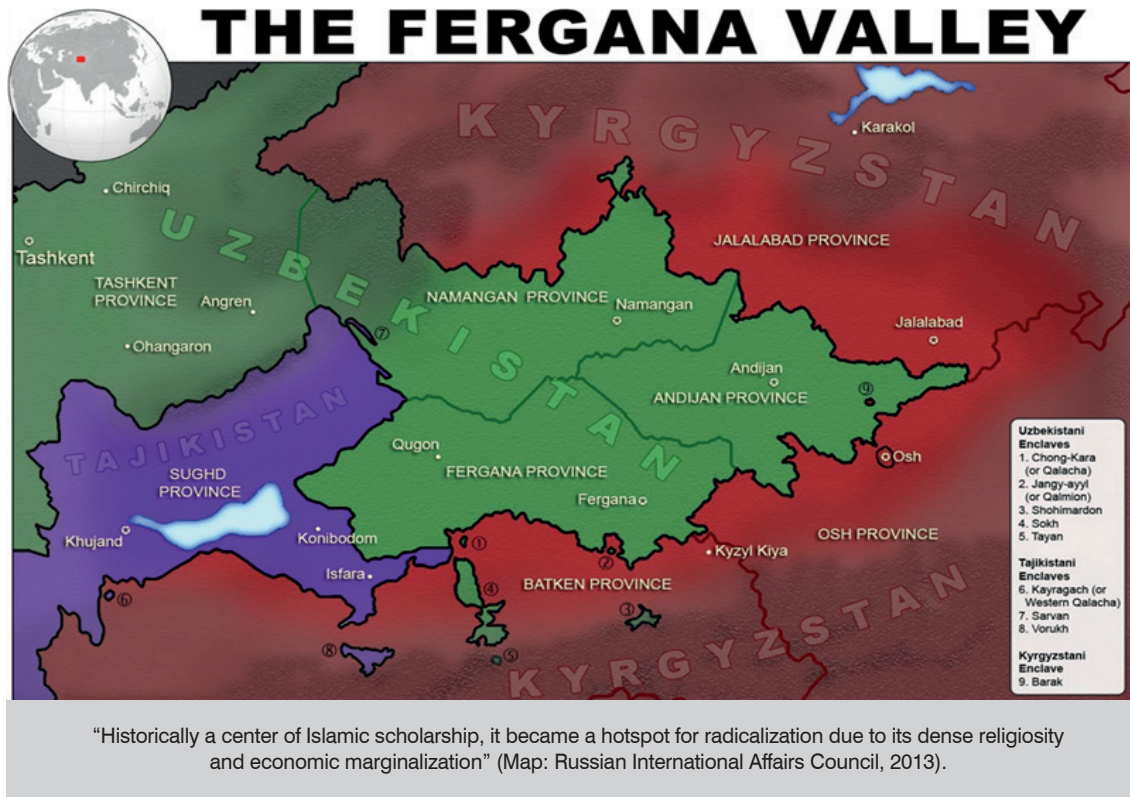
A critical debate in the literature centers on whether contemporary radicalism is an organic outgrowth of Central Asia's Islamic history or a rupture caused by Soviet repression and post-independence instability. Some scholars argue that Soviet policies merely suppressed, rather than eradicated, Islamic consciousness, leaving a spiritual vacuum later exploited by radicals (Haghighyeghi, 1996; Еропов, 2014). Others contend that Soviet secularization inadvertently preserved traditional Islam by insulating it from

foreign fundamentalist influences until the 1990s (Khalid, 2007; Safranchuk & Makhmudov, 2024). The resurgence of Islam in the post-Soviet era thus became a battleground between three factions: traditionalists seeking to restore pre-Soviet Hanafi practices, reformists advocating moderate reinterpretations, and radicals promoting violent rejection of both secular and traditional structures (Collins, 2007; Omelicheva, 2013).

The Ferghana Valley exemplifies this ideological contest. Historically a center of Islamic scholarship, it became a hotspot for radicalization due to its dense religiosity and economic marginalization (Olcott, 2007). Movements like the Islamic Movement of Uzbekistan (IMU) emerged from localized grievances but adopted transnational jihadist rhetoric, illustrating how internal discontent fused with external ideological influences (Бабаджанов, 2010). This synthesis challenges earlier assumptions that Central Asian radicalism was merely an imported phenomenon, highlighting its hybrid nature instead.

The role of external actors in Central Asian radicalization has been widely examined, yet scholarly perspectives diverge on their relative influence. While some emphasize the direct impact of foreign groups like Hizb ut-Tahrir (HT) and Salafist missionaries (Orofino, 2021; Zelin, 2023), others argue that their success depended on pre-existing local conditions, such as state repression and economic despair (Safranchuk & Makhmudov, 2024). HT's growth in Uzbekistan, for instance, was facilitated by the government's heavy-handed crackdowns on moderate Islam, which alienated segments of the population and made HT's pan-Islamic caliphate narrative appealing (Еропов, 2014). Similarly, Salafism gained traction not solely through foreign proselytization but via returning labor migrants who rein-





terpreted their experiences through a radical lens (Sharipova & Beissembayev, 2023).

The Taliban's post-2021 transition from armed struggle to state governance precipitated a doctrinal rupture with transnational jihadist circles. Initially, HT emerged as a vocal critic, decrying the movement's retreat from global jihad, its confinement of revolutionary activities to Afghanistan's borders, and its refusal to support allied Islamist movements abroad (Knyazev, 2024). Despite the Taliban's ban on political opposition and regular arrests of HT members, the group maintains a clandestine presence in Afghanistan, disseminating propaganda through affiliated mosques and digital platforms. While the Taliban actively suppresses HT as a rival Islamist faction, viewing its pan-Islamic caliphate agenda as a threat to their emirate, HT avoids open confrontation. Instead,

it pursues a strategy of calculated infiltration, publicly endorsing Taliban positions while quietly recruiting within religious circles. This ambivalent dynamic reflects HT's historical pragmatism in hostile environments.

Existing studies often treat internal and external drivers of radicalization in isolation, neglecting their synergistic effects. This research bridges that gap by analyzing how localized grievances (e.g., poverty, lack of education, unemployment) intersect with transnational jihadist frameworks to produce distinct radical movements. Additionally, while prior works have extensively documented groups like HT and the IMU, fewer have examined the doctrinal evolution of Salafism in Central Asia, particularly its adaptation to post-Soviet criminal subcultures (Прохватилов, 2023).

### Jihadist groups linked to the region

The persistence of jihadist groups with ties to Central Asia underscores the connection between global ideological movements and localized militant ecosystems. While existing scholarship has broadly acknowledged the presence of organizations such as ISIS-Khorasan (ISIS-K), Al Qaeda, Katibat al-Imam al-Bukhari (KIB), Katibat Tawhid wal-Jihad (KTJ), and Jamaat Ansarullah (JA), critical gaps remain in understanding their operational dynamics, recruitment strategies, and adaptability in response to counterterrorism pressures. This section engages directly with these gaps, challenging prevailing assumptions through empirical evidence while situating the discussion within ongoing academic debates.

ISIS-K is currently the most active terrorist group in Afghanistan and the neighboring regions, with its operational base in eastern Afghanistan and the Pakistani border areas, drawing its operational capacity from Pakistani Taliban militants (TTP), Afghan ethnic minorities, Central Asian extremists, and defectors from other regional jihadist movements. At the same time, the Taliban has significantly constrained ISIS-K's disruptive capabilities through sustained counterterrorism efforts—both before and after its August 2021 takeover—the group retains transnational ambitions and the ability to conduct complex attacks, maintaining its status as a key regional security threat. ISIS-K frequently retaliates with terrorist attacks against civilians and foreigners to assert its opposition to Taliban rule, though its limited resources force it to operate covertly. The Taliban has countered ISIS-K primarily through intelligence-driven operations, achieving limited tactical successes. However, re-

source constraints hinder its ability to neutralize the group thoroughly, allowing ISIS-K to persist as an enduring security threat.

ISIS-K has demonstrated notable resilience despite counterterrorism pressures. The group's fighting force grew from several hundred members in 2015 to 5,000 and 7,000 by 2021, reaching an estimated 15,000 and 17,000 militants by early 2024. Recruitment efforts have increasingly targeted Tajiks, Uzbeks, and other foreign nationals. Recruitment of Central Asian nationals, particularly in Tajikistan, where systemic vulnerabilities aid radicalization, further expands its influence. E. Rahmon admitted that over the past three years, 24 Tajik citizens have committed terrorist attacks or have been suspected of planning attacks in ten countries (Umarov, 2024). Despite this growth, resistance from the Taliban and Afghan government has significantly limited its regional ambitions, leading ISIS to pivot toward recruiting Central Asians for involvement in Middle Eastern conflicts (Safranchuk & Makhmudov, 2024; Strachota, 2024; Эпрашев, 2024). This expansion occurred alongside high-profile attacks, including the November 2024 assault on Chinese workers in Tajikistan's Khatlon Province and the March 2024 Moscow attack that resulted in enormous casualties (Caballero, 2024; Серенко, 2024).

The Syrian conflict played a pivotal role in enhancing the operational capabilities of Central Asian jihadist groups. As a crucial training ground, the war enabled networks such as KIB and KTJ to develop into significant militant forces. These groups strengthened their ties to global jihadism by integrating with Hay'at Tahrir al-Sham, al-Qaeda's affiliate in Syria, which provided them with combat experience, ideological reinforcement, and transnational connec-

tions. This period marked a qualitative leap in their organizational sophistication and regional influence (Soliev, 2019; 2020). KTJ established itself as a particularly sophisticated network, responsible for the April 2017 St. Petersburg metro bombing that killed 16 people and the August 2016 attack on the Chinese Embassy in Bishkek (Тюкеев, 2024). The group maintains an estimated 700 militants and has demonstrated continued recruitment among Central Asian migrant workers in Russia. (Safranchuk & Makhmudov, 2024) Russian authorities reported intercepting increased recruitment communications, with 39 KTJ members detained in 2021-2022 and an additional 49 in February 2024 (Ведомости, 2024). The prominence of Tajik commander Saifiddin Tadjiboev within Hay'at Tahrir al-Sham's lead-

ership structure further illustrates the growing influence of Central Asian militants in transnational jihadist networks (Orda, 2025; SCO RATS, 2025).

In Afghanistan, JA and its offshoot, Tehrik-e Taliban Tajikistan (TTT), have emerged as persistent threats to regional stability. JA's 300 fighters and TTT's 200 militants operate along the Tajik-Afghan border, exploiting Taliban patronage to acquire advanced weaponry while promoting irredentist goals through propaganda outlets like "Voice of Khorasan" (Makhmudov et al., 2023). The Taliban's refusal to extradite JA members, coupled with their insistence on mediation, reflects strategic calculations that prioritize maintaining a buffer force over addressing Dushanbe's security concerns (Pannier, 2024).



"The Syrian conflict played a pivotal role in enhancing the operational capabilities of Central Asian jihadist groups" (Photo: CGTN, nd.).

However, the Taliban's recent crackdown on Tajik commanders in northern Afghanistan - particularly the arrest of Haqqani-linked leader Hossein Jundi in Takhar province - exposes critical ethnic and factional divisions within the movement. This purge reflects the Kandahar leadership's attempt to consolidate Pashtun dominance while weakening the historically autonomous Haqqani Network (Bifolchi, 2025). While reducing Tajik militant influence could facilitate improved Afghanistan-Tajikistan relations by decreasing cross-border threats from Tajik Islamic fundamentalists, the marginalization of the minority faction risks destabilizing northern regions where anti-Taliban sentiment persists. More alarmingly, these actions may create operational space for ISIS-K to recruit among alienated Tajik communities and exploit ethnic tensions, potentially reigniting local insurgencies while undermining the Taliban's fragile authority.

### **The CSTO's Counter-Terrorism Initiatives in Central Asia**

The CSTO is a pivotal regional entity established under the 1992 Collective Security Treaty, designed to safeguard member states from external threats and combat terrorism through strategic and operational frameworks. Its significance in Russian foreign policy, particularly in Central Asia, is underscored in Russia's 2016 and 2023 Foreign Policy Concepts, which position the CSTO as a cornerstone of regional security (MFA Russia, 2016, 2023). For Tajikistan, CSTO membership is a critical component of its national and regional security strategy, especially in light of threats emanating from Afghanistan. This is evident in Tajikistan's 2015 Foreign Policy Concept and its reliance on CSTO support during the 2015

Dushanbe uprising (MFA Tajikistan, 2015). In contrast, Kyrgyzstan's 2019 Foreign Policy Concept adopts a more measured stance, viewing the CSTO as one of several multilateral platforms, a perspective shaped by the organization's perceived inaction during the 2010 ethnic clashes (KR, 2019). Conversely, Kazakhstan employs a multi-vector foreign policy approach, equating the CSTO with NATO in its 2020 Foreign Policy Concept. However, following CSTO peacekeeping support during internal unrest in 2022, Kazakhstan's rhetoric has increasingly acknowledged the organization's growing importance (Akorda, 2020; Белоглазов, 2024).

### **Conceptual foundations for countering terrorism in the CSTO**

The CSTO's approach to countering terrorism is rooted in its foundational principles, as articulated in its Charter, particularly Article 3, adopted during the Moscow Summit on October 7, 2002. The Charter outlines the organization's primary objectives: fostering peace, enhancing regional and international security, and ensuring stability, with a strong emphasis on the collective defense of member states' independence, territorial integrity, and sovereignty. Political and diplomatic measures are prioritized as the primary means of addressing security threats, reflecting the CSTO's commitment to peaceful conflict resolution (CSTO, 2002).

As the main guarantor for the organization's preservation and the most significant military and financial donor, Russia has played a central role in shaping the organization's conceptual framework and operational priorities. While the CSTO lacks a specific definition of terrorism, it aligns with international conventions, UN resolutions, and



CIS frameworks, such as the 2009 model law 'On Combating Terrorism (CIS Assembly, 2009). The CSTO has consistently advocated for the UN to establish a comprehensive legal definition of terrorism and maintain updated lists of terrorist organizations, reflecting its commitment to aligning with global counterterrorism standards. These efforts have been strongly supported by Moscow, which has used its diplomatic influence to advance the CSTO's agenda on the international stage.

The CSTO's strategic framework addresses interconnected threats like terrorism and drug trafficking, where terrorist groups fund operations through trafficking networks. Member states have pooled resources and enhanced their collaborative efforts to counter these intertwined threats. Key initiatives include the 2001 reform of the Collective Rapid Deployment Forces, the 2003 establishment of a Russian airbase in Kyrgyzstan, and agreements to secure external borders with-

in the Eurasian Economic Community (CSTO, 2001; Белоглазов, 2024). These measures have significantly strengthened the CSTO's operational capacity, with Russia providing critical logistical and military support.

Article 8 of the CSTO Charter highlights a collective approach to terrorism, extremism, and trafficking, operationalized through specialized forces like the Collective Rapid Deployment Forces (2001), the Collective Rapid Reaction Forces (KSOR, 2009), and the Collective Peacekeeping Forces. The KSOR, comprising 18,000 personnel, integrates military contingents and special forces from member states, enabling them to perform various tasks. Additional units, such as the Rapid Deployment Collective Forces and Collective Air Forces, further enhance the CSTO's operational capacity. Regular joint exercises simulate terrorist scenarios, allowing member states to test and refine their collaborative responses (CSTO, 2002; 2009).



An image image from the CSTO's anti-terrorist exercise in Tajikistan. The CSTO is a pivotal regional entity established under the 1992 Collective Security Treaty, designed to safeguard member states from external threats and combat terrorism through strategic and operational frameworks (Photo: Ministry of Defence of the Russian Federation, 2025).

The CSTO's institutional framework includes key bodies like the Collective Security Council, the Council of Foreign Ministers, the Committee of Security Council Secretaries, and the Council of Defense Ministers. Since 2005, the Working Group on Counterterrorism has been pivotal in strategy development and threat assessment. Another important body, the Working Group on Afghanistan, functions under the Council of Foreign Ministers, focusing on monitoring the situation in Afghanistan and collaborating with its government to prevent militant incursions, particularly in Tajikistan. Russian representatives in the Afghanistan working group discussed revised Afghan proposals on CSTO cooperation in Kabul, leading to Afghan involvement in the group from November 2006 (Гонтарь, 2015).

**Russia has been a driving force in enhancing the CSTO's legal and institutional infrastructure. The establishment of a Joint Staff in 2004 improved coordination among member states, while a 2005 agreement facilitated military training across member states' educational institutions, fostering a unified approach to collective security.**

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tary training across member states' educational institutions, fostering a unified approach to collective security. (CSTO, 2004, 2005) Uzbekistan's 2006 accession expanded the CSTO's influence, though it suspended membership in 2012. The organization has also pursued regional cooperation with other entities, such as the SCO. A 2007 Memorandum of Understanding between the CSTO and SCO facilitated joint efforts against terrorism, drug trafficking, arms proliferation, and organized crime, reinforcing multilateral engagement (SCO & CSTO, 2007).

Efforts to establish a unified terrorist list began in 2003, with a preliminary list approved in 2004, though challenges arose due to differing national criteria for designating terrorist organizations. Negotiations resumed in 2015, leading to a unified list adopted in 2016 and finalized in 2017 (Ведомости, 2016; Дорохина, 2018). However, Tajikistan's President Emomali Rahmon expressed concerns in 2022 about the incomplete implementation of the list (Sputnik, 2022).

In April 2025, Russia's Supreme Court lifted the two-decade ban on the Taliban, immediately removing it from the terrorist organizations list. This follows 2023 recommendations from the Foreign and Justice Ministries, later supported by the Prosecutor General. The FSB notes the Taliban's willingness to combat militants linked to the Crocus City Hall attack. The decision facilitates expanded Russia-Afghanistan ties across diplomatic, economic, and cultural spheres, reflecting the group's reduced terrorist activities and crackdown on rival extremists. The move aligns with Central Asian trends - Kazakhstan and Kyrgyzstan previously delisted the Taliban, though no state grants it full recognition. Tajikistan maintains the region's most rigid stance,



demanding minority rights and Tajik inclusion in Afghanistan's government, while continuing electricity exports (Суринская & Лакстыгал, 2025).

The CSTO's 2016-2025 Collective Security Strategy reaffirms its commitment to combating terrorism, emphasizing coordinated efforts across military, diplomatic, and institutional domains (CSTO, 2016). This approach underscores the CSTO's focus on strengthening security capabilities, fostering multilateral cooperation, and addressing the root causes of terrorism, aligning with broader global security trends. As the CSTO's primary military and financial sponsor, Russia is leading in advancing these initiatives. Through these efforts, the CSTO remains a key player in shaping regional security dynamics in Central Asia and beyond.

### **CSTO counter-terrorism exercises and operations**

The CSTO has consistently prioritized enhancing the counterterrorism capabilities of its member states through joint military exercises and operations. These initiatives aim to improve operational readiness, interoperability, and the collective ability to respond to modern security threats. By simulating realistic terrorist scenarios—such as hostage situations, bombings, and attacks on critical infrastructure—the CSTO refines coordination, streamlines procedures, and strengthens its capacity to address complex and evolving challenges.

The security situation in Afghanistan significantly shapes the CSTO's counter-terrorism exercises. The Taliban's return to power heightened concerns about cross-border terrorism, drug trafficking, and the spread of extremist

ideologies into Central Asia. Tajikistan, with its 1,400-kilometer border with Afghanistan, has been particularly vulnerable. The "Cobalt" exercise series, launched in 2010, addresses these threats by involving special forces, reconnaissance units, and advanced military technologies to disrupt terrorist activities and dismantle illegal networks. For example, "Cobalt-2021" in Tajikistan demonstrated the use of rapid response forces, reconnaissance battalions, and military helicopters to neutralize simulated terrorist incursions. At the same time, the 2024 iteration in Russia emphasized collaboration among internal security forces, national guard units, and anti-terrorism squads, showcasing the CSTO's ability to operate in combat-realistic conditions (Muraviev, 2022).

Complementing "Cobalt," the "Thunder" exercises focus on special forces from anti-drug agencies and security services. Held biennially since 2012, these exercises target transnational criminal organizations, particularly in regions like Tajikistan, where illicit trade and insurgencies pose significant threats. By addressing the intersection of terrorism and organized crime, "Thunder" enhances the CSTO's ability to combat modern security challenges.

The "Indestructible Brotherhood" exercises, initiated in 2017, integrate reconnaissance, rapid deployment, logistical support, and peacekeeping operations. The 2017 edition involved 12,000 personnel and 1,500 units of military equipment, simulating scenarios like intelligence gathering and conflict resolution (CSTO, 2017). The 2024 iteration in Kazakhstan focused on peacekeeping tasks such as managing checkpoints, providing humanitarian aid, and patrolling conflict zones, highlighting the CSTO's ability to coordinate military and civilian agencies (CSTO, 2024c).

Similarly, the “Interaction” exercises, held annually since 2009, address regional security threats, including neutralizing illegal armed groups and special operations. These drills also incorporate information warfare and psychological operations, reflecting the CSTO’s recognition of the multifaceted nature of modern terrorism. The 2021 edition, conducted alongside “Poisk” and “Echelon,” involved 4,000 soldiers and 500 units of military hardware, demonstrating the CSTO’s integrated approach to counterterrorism (CSTO, 2021). The “Poisk” exercises, initiated in 2016, focus on enhancing intelligence and reconnaissance capabilities. The 2024 iteration in Kyrgyzstan utilized advanced technologies like UAVs and thermal imaging to refine joint reconnaissance operations, ensuring CSTO forces are prepared for swift and effective counterterrorism missions (CSTO, 2024a).

**The CSTO’s counterterrorism initiatives - ranging from large-scale exercises like “Indestructible Brotherhood” to targeted operations like “Mercenary” and “Proxy” - reflect a comprehensive and adaptive approach to addressing both conventional and emerging threats.**

The “Rubezh” and “Echelon” exercises play complementary roles. “Rubezh” focuses on rapid deployment to defend Central Asia from external threats, while “Echelon” emphasizes logistics and material support. The “Air Bridge” exercises, first held in 2018, test the CSTO’s ability to deploy

forces across vast distances, a critical capability for responding to terrorist threats in remote areas.

Operation “Mercenary,” launched in 2018, disrupts recruitment networks and the movement of individuals from CSTO member states to participate in terrorist activities abroad, particularly in the Middle East. In 2023, Russian President Vladimir Putin highlighted his role in countering the recruitment of nationals by terrorist organizations. The operation has led to the arrest of members of banned groups like “Islamic State” and “Hizb ut-Tahrir,” demonstrating its effectiveness (RBC, 2023).

Operation “Proxy,” launched in 2009, addresses cyberterrorism, online recruitment, and the spread of extremist ideologies. Reflecting the CSTO’s adaptation to the digital age, “Proxy” targets the internet as a primary tool for extremist recruitment. The CSTO has also collaborated with the SCO on cybersecurity initiatives, underscoring the importance of multilateral cooperation in combating digital threats (Rauf, 2020).

The CSTO’s counterterrorism capabilities were tested during Kazakhstan’s unrest in January 2022. As protests turned violent, President Kassym-Jomart Tokayev, due to the terrorist threat, requested CSTO assistance. The swift deployment of Collective Peacekeeping Forces, led by Russia, stabilized critical infrastructure, marking the first invocation of Article 4 of the Collective Security Treaty, which allows for collective defense against external threats (Kucera, 2022). This intervention demonstrated the CSTO’s rapid deployment capacity and adaptability to non-traditional security challenges, such as riots by religious militants, while reinforcing Russia’s leadership role in Central Asia.

The CSTO’s 2025 agenda prioritizes counterterrorism, focusing on crisis prevention and re-



"The CSTO's counterterrorism capabilities were tested during Kazakhstan's unrest in January 2022"  
(Photo: CSTO website, 2022).

gional security. A key initiative is a joint counterterrorism exercise in Tajikistan, integrated with the "Indestructible Brotherhood-2025" peacekeeping drill and coordinated with CIS states—the first under the 2024 "Memorandum of Cooperation between the CSTO and the CIS Anti-Terrorism Center." A simulated peacekeeping mission will also occur in Tajikistan's Khotlon region. Colonel-General Serdyukov emphasized that these drills strengthen readiness against terrorism, extremism, and regional instability. Meanwhile, Kyrgyzstan hosts an operational meeting and the "Rubezh-2025" command-staff exercise on rapid deployment and crisis response (CSTO, 2025b).

The CSTO's counterterrorism initiatives—ranging from large-scale exercises like "Indestructible Brotherhood" to targeted operations like "Mercenary" and "Proxy"—reflect a comprehensive and adaptive approach to addressing both conventional and emerging threats. By simulating realistic scenarios, leveraging advanced technologies, and fostering regional cooperation, the CSTO enhances member states' operational readiness. However, challenges remain, including aligning national strategies and addressing evolving threats like cyberterrorism and ideological extremism. The CSTO's ability to adapt will determine its long-term effectiveness in maintaining regional security.

## Challenges for the CSTO on Counter-Terrorism

### The digitalization of terrorism

One of Russia's most significant challenges within the CSTO framework is combating the transnational nature of modern terrorism, a threat exacerbated by the rapid digitalization of Central Asia and the region's socioeconomic vulnerabilities. Despite Russia's notable successes in coordinating anti-terrorism initiatives through the organization, the CSTO continues to face persistent and emerging challenges that undermine its effectiveness. Extremist groups actively exploit social media platforms for the recruitment and radicalization of youth while also utilizing encrypted communication channels to evade detection by Russian and Central Asian intelligence agencies. This digital dimension of terrorism underscores the need for enhanced internal coordination among CSTO member states, as well as collaboration with external actors, including Middle Eastern countries, China, the United States, and international organizations. However, geopolitical disagreements and differing counterterrorism priorities often hinder practical cooperation, complicating efforts to address cross-border threats.

The growing reliance of extremist groups on digital tools is further illuminated by a study conducted by the Institute for Advanced International Studies (Uzbekistan), which monitored various social media platforms across multiple languages, such as Russian, Uzbek, Tajik, Kyrgyz, and Kazakh. The study aimed to analyze the dissemination of radical ideologies and assess their influence within these networks. Its

key findings identified particularly high activity among radical groups and propagandists on Uzbek and Tajik language platforms, where a significant volume of propaganda content was detected. The study revealed that propaganda targeting migrants living in Russia contributed to provocations preceding the terrorist attack at Crocus City Hall in Moscow. Additionally, it demonstrated that analyzing recruiter-generated content can help determine affiliations with specific organizations or groups, emphasizing the strategic value of understanding the target audience and objectives of propaganda (IAIS, 2024).

In a related development, Uzbekistan's Supreme Court published a comprehensive list of materials containing extremist and terrorist ideologies prohibited from import, production, distribution, or display within the country. The list includes banned channels on YouTube (135), Telegram (713), Instagram profiles (226), Facebook pages (203), TikTok accounts (44), and other social media platforms (68) (Ўзбекистон Республикаси Олий суди, 2025). This regulatory measure highlights the growing recognition of social media as a critical vector for the spread of radical content and aligns with the findings of the IAIS.

Groups such as the Islamic State-Khorasan exemplify this trend, actively using Telegram, which has become the primary tool of international terrorism for recruitment, propaganda dissemination, and operational management. This was starkly demonstrated during the March 2024 terrorist attack in Moscow, which exposed vulnerabilities in Russia's security system. The attack highlighted the dependence of terrorist groups on digital tools, underscoring the need for modern technical resources, continuous





"This digital dimension of terrorism suggests that there must be enhanced internal coordination among CSTO member states, as well as collaboration with external actors, including Middle Eastern countries, China, the United States, and international organizations" (Photo: Azernews, 2025).

training, and upskilling of counterterrorism personnel within CSTO member states. However, these efforts are frequently undermined by insufficient coordination and information sharing among member countries. For instance, prior to the Moscow attack, the brother of one of the perpetrators had been placed on Tajikistan's wanted list for involvement in terrorist activities in Syria. However, due to flaws in information-sharing mechanisms between Russian and Tajik intelligence agencies, other family members, including the attacker himself, were able to cross into Russia unimpeded. (Соловова, 2024) This failure highlights significant gaps in joint

operational efforts and reveals systemic vulnerabilities in the CSTO's collective counterterrorism strategy. For Russia, effective organizational leadership requires strengthening internal coordination, enhancing intelligence sharing, and conducting joint training programs to counter evolving transnational threats.

### **Territorial disputes and socioeconomic factors**

Recent years have revealed another persistent structural challenge for the organization, particularly unresolved territorial disputes and a lack of political will for peaceful conflict resolution.



The 972-kilometer border between Kyrgyzstan and Tajikistan, inherited from the Soviet era, has been a source of tension. Ignoring ethnic and economic realities, the border runs through disputed enclaves, which have provoked decades of conflicts over access to resources. Following the collapse of the USSR, tensions escalated into frequent clashes between local communities, culminating in armed conflicts between two CSTO members in 2021–2022 that resulted in dozens of deaths and mass evacuations. These events underscore the fragility of regional stability and the need for diplomatic solutions.

**In addition to operational and technical challenges, public perception and trust are key but often underestimated aspects of effective counterterrorism.**

Despite initial reluctance from Bishkek and Dushanbe to accept external mediation, Russia played a key role in organizing negotiations. A trilateral meeting in October 2022, initiated by Moscow, marked a turning point. Over the following two years, with support from Russia and the CSTO, Kyrgyzstan and Tajikistan used archival documents provided by Russia to clarify the border, culminating in the signing of a delimitation agreement in February 2024 (CSTO PA, 2022; Xinhua, 2025). However, the conflicting parties' lack of official recognition of Russia's role indicates lingering tensions and a reluctance to acknowledge dependence on external arbitration. While the agreement represents a significant step, long-term stability depends on the ability of the parties to build trust. The CSTO's adoption of a targeted

program to strengthen the Tajik-Afghan border for 2025–2030 highlights the interconnectedness of regional security. Stability on the Kyrgyz-Tajik border is critical to the success of such initiatives, as any escalation could jeopardize efforts to ensure security in Central Asia (CSTO, 2024b).

In addition to operational and technical challenges, public perception and trust are key but often underestimated aspects of effective counterterrorism. The CSTO faces difficulties informing the public about its achievements and initiatives, leading to a lack of popular support and legitimacy. This gap undermines the organization's ability to mobilize society against extremist ideologies. Strengthening transparency and engaging with civil society could enhance public trust and improve the CSTO's image. For Russia, this represents both a challenge and an opportunity: on one hand, it must address internal coordination and external cooperation challenges; on the other, it can leverage its leadership role to shape a more cohesive and adaptive counterterrorism strategy within the CSTO. Addressing these issues would allow Russia to strengthen its influence in Central Asia and ensure the CSTO's relevance in combating modern security threats.

Moreover, socioeconomic factors contributing to radicalization in Central Asia cannot be ignored. High levels of unemployment, poverty, and limited access to education create fertile ground for extremist recruitment. While the CSTO primarily focuses on military and security measures, a more comprehensive approach that includes socioeconomic development initiatives could address the root causes of terrorism. Russia, as the dominant force within the organization, has the potential to promote such efforts, but this would require a reevaluation of strategic priorities and increased investment in regional development



Tajik President Emomali Rahmon (center), Kyrgyz President Sadyr Japarov (left) and Uzbek President Shavkat Mirziyoyev signed a treaty on the junction point of their national borders in Khujand, Tajikistan, March 31, 2025 (Photo: Zafar Khalilov/Xinhua, 2025).

programs. A dual approach combining security measures with socioeconomic initiatives could enhance the CSTO's long-term effectiveness and contribute to sustainable regional stability.

### **Syrian instability as a challenge to Central Asian security**

The transfer of power in Syria following opposition forces' capture of key territories has significant security implications for SCO members and CSTO operations. The conflict has fragmented Syria into competing zones of influence, creating

conditions for transnational jihadist networks to re-emerge as a security threat. Of particular concern is the potential return of Central Asian, Russian, and Chinese former ISIS fighters from Syrian detention facilities, which could reactivate terrorist cells across the region. Afghanistan remains especially vulnerable due to the Taliban's limited capacity to counter entrenched terrorist groups like ISIS-K and Al-Qaeda amid economic and political challenges. The persistent appeal of transnational jihadist organizations, coupled with local socioeconomic grievances, continues to drive radicalization.

Since the beginning of the civil war in Syria in 2011, citizens of the former USSR began actively joining Salafi-jihadist groups such as Jabhat al-Nusra and ISIS. However, after ISIS lost control over the Syrian-Turkish border in 2016, the flow of militants from the CIS significantly decreased. In Idlib, where foreign fighters have always been a minority, their numbers also declined due to combat losses, lack of reinforcements, and changes in the policy of Jabhat al-Nusra's leader, Abu Muhammad al-Julani (Семенов, 2025).

**Overall, the current policy of the Syrian leadership aims to create a more inclusive and moderate society, reducing the likelihood of a repeat of the 2021 Afghan scenario.**

Since 2016, Jabhat al-Nusra began revising its strategy, abandoning global jihad in favor of a local one, limited to Syrian territory. This led to an internal division between a radical wing, consisting mainly of foreigners, and a more moderate one, represented by Syrians. After the group's transformation into HTS in 2017, the process of "Syrianization" accelerated, significantly reducing the role of foreign fighters. Many of them, having settled in Syria, began integrating into local society, starting families and abandoning radical ideologies. However, not all foreign fighters support the current policies of the Syrian leadership. For example, members of the group Tanzim Hurras al-Din, representing Al-Qaeda in Syria, or Ansar al-Tawhid, remain committed to the idea of "exporting" jihad, which contradicts the more moderate line pursued by HTS in Syria (Анто

Мардасов & Семенов, 2024).

The policy of deradicalization and integration pursued by the new Syrian authorities contributes to the reduction of terrorist threats. However, it causes discontent among radical Salafists, especially from the post-Soviet space, who criticize the abandonment of Sharia norms, such as hudud punishments, and the liberalization of social policies, including the expanded role of women in society. Overall, the current policy of the Syrian leadership aims to create a more inclusive and moderate society, reducing the likelihood of a repeat of the 2021 Afghan scenario. However, persistent disagreements with radical elements, particularly among foreign fighters, indicate the need for further efforts to strengthen stability and prevent potential recurrences of radicalization (Семенов, 2025).

Security Council Secretary of the Kyrgyz Republic Marat Imankulov observed that Syria's future remains uncertain and far from achieving stability. The new Syrian authorities will inevitably confront their most formidable ideological adversary - ISIS, which maintains significant combat capabilities. Of particular concern is the potential spillover of multinational terrorist elements beyond Syria's borders, a worry shared by neighboring states and the international community. Current estimates suggest approximately 20,000 foreign fighters have integrated into Syrian security structures, including members of the Islamic Movement of Eastern Turkistan. Expert analyses indicate that about 6,000 of these combatants are oriented explicitly toward destabilizing China, while others originate from Central Asia and the North Caucasus region. Notably, around 5,000 militants (excluding family members) trace their origins to Central Asian countries (Imankulov, 2025).



Members of the East Turkistan Islamic Movement terrorist organization in Syria  
(Photo: Asiatimes, 2024).

A particularly troubling development involves the appointment of individuals wanted for terrorism- and extremism-related crimes in their home countries to key government positions in Syria. Beyond the propaganda value of such appointments, these individuals gain the ability to travel freely from Syria, visit other countries under official status, and conduct destabilizing activities, creating significant security risks for the region. While M. Imankulov notes the current Syrian administration remains primarily focused on domestic governance, with former militant groups like the Islamic Movement of Eastern Turkistan now integrated into security structures, the potential for large-scale fighter dispersal persists. Although immediate mass migration appears unlikely, any significant political rupture could trigger the exodus of embedded for-

eign combatants (Imankulov, 2025).

Since December 2024, HTS has significantly expanded its presence in Afghanistan, particularly in the Andarab Valley of Baghlan Province, which has become a regional hub for foreign militants. Following their victory in Syria, Uyghur, Tajik, Uzbek, Chechen, and other HTS fighters relocated to Afghanistan and Pakistan, with early cells led by Mawlawi Abdul Fatah, a veteran Tajik militant with experience in the Islamic State, al-Qaeda, and HTS. By late December 2024, around 500–700 fighters and their families had settled in Baghlan's Banu, Dih-Salah, and Pul-i-Hisar districts. The group grew rapidly in early 2025 due to foreign arrivals and local recruitment, aided by logistical support from Hizb ut-Tahrir's Afghan branch (Серенко, 2025).

HTS recruitment in Afghanistan primarily occurs through mosques in Baghlan and, as of spring 2025, in Herat Province near the Iranian border. Local mullahs encourage youth to join, with contracts signed directly in mosques, where recruits receive upfront payments while mullahs take a commission. This campaign has significantly boosted HTS's Afghan branch, with estimates suggesting nearly 10,000 fighters, including disaffected Taliban members frustrated by unpaid salaries. This trend potentially threatens not only Central Asia, Russia, and Iran, but also China, since a significant number of HTS militants in Afghanistan are Uighurs with experience in the "Syrian jihad" (Серенко, 2025).

### Conclusion

The phenomenon of radicalization in Central Asia represents a complex interplay of historical, socioeconomic, and geopolitical factors that collectively shape the region's contemporary security challenges. At its core, this vulnerability originates from the Soviet-era systematic dismantling of traditional Islamic institutions, which not only disrupted centuries-old religious structures but also created an ideological vacuum. In the post-Soviet period, this vacuum became fertile ground for competing interpretations of Islam, including radical ideologies that gained traction amid weak state control and institutional fragility. The historical trajectory was further exacerbated by the strategic exploitation of socioeconomic grievances by transnational terrorist networks, which deliberately targeted marginalized urban peripheries and migrant communities where governance deficits were most pronounced.

The CSTO has emerged as the cornerstone of regional security architecture, functioning as Rus-

sia's primary mechanism for counterterrorism cooperation and collective defense in Central Asia. While the organization has demonstrated operational efficacy during critical crises (2022 unrest in Kazakhstan), its structural limitations were starkly exposed by intelligence-sharing failures preceding the 2024 Moscow attack. These shortcomings underscore the growing disconnect between the CSTO's traditional security framework and the evolving nature of transnational threats. The regional security calculus has been further complicated by geopolitical shifts beyond Central Asia, particularly the Taliban's 2021 return to power in Afghanistan and the fall of the Bashar al-Assad regime in Syria in 2024. The developments have reinforced the perception of protracted asymmetric warfare as a viable strategy against conventionally superior forces. This paradigm shift has emboldened jihadist movements globally, reshaping their tactical and ideological approaches.

The situation in Afghanistan remains a critical determinant of regional security. The modern Taliban regime has undergone a significant transformation since its 1990s incarnation as an internationally designated terrorist movement. Since regaining power in 2021, the group has shifted toward state-building and internal security consolidation, actively combating international terrorist groups such as ISIS-K and Hizb ut-Tahrir. This pragmatic repositioning has aligned the Taliban with the security interests of the key regional actors, reducing immediate risks of cross-border destabilization. Economic pragmatism has further reinforced this trend, evidenced by the Taliban's participation in regional infrastructure projects, including the Trans-Afghan Railway and the China-Kazakhstan-Uzbekistan-Afghanistan rail corridor. However, systemic challenges persist,





including weak central governance, economic fragility, and residual radical elements that constrain the Taliban’s counterterrorism effectiveness. Engagement through multilateral frameworks such as the SCO and the Moscow Consultations has mitigated confrontation risks, gradually recasting the Taliban as a potential security partner rather than an overt threat.

Regardless of the Taliban’s attempts to consolidate power, Afghanistan’s borders with Pakistan and Central Asia remain volatile due to persistent transnational militant activity. While some factions maintain nominal allegiance to Kabul, their true loyalties remain ambiguous, divided by ideological divergences, external financing, and command structures beyond Afghanistan’s control. This duality creates a security paradox that sus-

tains cross-border threats while potentially weakening Taliban authority, thereby limiting Kabul’s capacity to foster regional security cooperation or effectively dismantle terrorist networks. The situation is exacerbated by returning Central Asian militants from Syria, whose potential collaboration with al-Qaeda or ISIS-K heightens risks. International sanctions and frozen reserves further weaken the Taliban’s counterterrorism capacity, impeding governance and economic recovery. Though Russia and China advocate for sanctions relief, sustainable stability requires deeper integration of Afghanistan into regional economic frameworks—a process already initiated but still dependent on enhanced Sino-Russian coordination and time to address structural drivers of instability.

To enhance the CSTO's counterterrorism efficacy, a multi-dimensional reform agenda must prioritize cybersecurity as a strategic imperative. Establishing a dedicated CSTO Cyber Command would serve as a critical institutional mechanism, enabling the organization to systematically monitor extremist propaganda, disrupt online radicalization efforts, and coordinate transnational counter-narrative campaigns. Further reinforcing this framework, institutionalized joint cyber defense exercises with the SCO could standardize operational response protocols and enhance technical interoperability among member states, thereby closing gaps in collective cybersecurity preparedness. These proposed measures align with recent institutional developments, particularly the April 2025 memorandum of cooperation between the CSTO Secretariat and the Cyberus Foundation. This agreement represents a substantive step toward modernization, focusing on three key areas: joint research into cyber threats against critical infrastructure, the standardization of specialist training protocols, and harmonizing cybersecurity legislation across member states. (CSTO, 2025a)

The CSTO's counterterrorism effectiveness is constrained by institutional deficiencies in intelligence-sharing mechanisms, stemming from inadequate interoperability among security services, uneven technical capacities across member states, and critical personnel shortages, particularly acute in Central Asia, where under-resourced regional offices lack specialized counterterrorism expertise and modern surveillance infrastructure, creating persistent operational blind spots. The absence of a unified terrorist watchlist forces dependence on bilateral information transfers, creating security vulnera-

bilities and gaps in tracking transnational militants. At the same time, the lack of standardized training protocols and coherent cybersecurity frameworks exacerbates vulnerability to hybrid threats. To address these systemic weaknesses, the organization should establish a Joint Analytical Center employing distributed data governance to balance threat analysis with national sovereignty while pursuing structured cooperation with key actors on cross-border militant tracking.

**Despite prevailing Western narratives that see Central Asia as an arena of Sino-Russian rivalry, the reality demonstrates a complementary partnership between the two powers in enhancing regional security. Russia provides military and strategic leadership through the CSTO. At the same time, China's economic engagement, particularly through the Belt and Road Initiative and the Digital Silk Road, offers a developmental framework for addressing the root causes of extremism.**

Parallel priorities include creating regional training hubs for context-specific capacity building, implementing preventive counter-radicalization measures, and pursuing gradual legal harmonization that accommodates national jurisdictions. This comprehensive approach would

simultaneously close immediate operational gaps and build long-term institutional resilience against evolving asymmetric threats.

The CSTO should accelerate the modernization of its KSOR to counter hybrid threats with specialized counter-terrorism units experienced in asymmetric warfare and operations using modern weaponry, such as drone warfare, addressing their growing use not only by full-fledged armies but also by terrorist groups. This modernization should integrate member states' battle-tested systems, particularly Russia's recent operational experience, while ensuring interoperability and preserving peacekeeping capabilities. Standardized training should reflect modern hybrid warfare scenarios such as terrain monitoring, protection of facilities from drone attacks, and precision strikes against the enemy to maintain readiness for rapid deployment across the CSTO security landscape.

Despite prevailing Western narratives that see Central Asia as an arena of Sino-Russian rivalry, the reality demonstrates a complementary partnership between the two powers in enhancing regional security. Russia provides military and strategic leadership through the CSTO. At the same time, China's economic engagement, particularly through the Belt and Road Initiative and the Digital Silk Road, offers a developmental framework for addressing the root causes of extremism. Expanding cooperation between the SCO and CSTO, especially in security technologies where China has made significant progress, and promoting deeper institutional integration between the two organizations could combine their strengths to improve regional security coordination. Furthermore, joint efforts by China and Russia to support Afghanistan's economic

recovery and strengthen the Taliban's counterterrorism capabilities can potentially reinforce regional stability. These efforts are significant given the resurgence of jihadist networks in Syria and the growing influx of foreign fighters into Afghanistan, which collectively threaten the security of Central Asia, Russia, and China.

Finally, CSTO member states continue to face key drivers of radicalization in Central Asia, such as poverty, youth unemployment, forced migration, and limited access to education. These socioeconomic factors fuel extremist ideologies, especially among rural youth. Without addressing these root causes, counterterrorism strategies risk being reactive. Additionally, the CSTO's lack of transparency, fragmented communication, and weak civil society engagement have led to low public legitimacy, undermining its counter-extremism efforts and its ability to build social resilience against jihadist networks.

Russia is strategically responsible for pairing its security leadership with long-term developmental support. By fostering economic opportunities in member states, particularly through investments in the real sector, Russia can reduce the vulnerability of at-risk populations to extremist recruitment. Shifting toward a more comprehensive security model that integrates military deterrence with socioeconomic stabilization would strengthen the CSTO's operational credibility and enhance the region's resilience against ideological and material threats from foreign terrorist organizations. In this regard, sustained Russian involvement in promoting development-driven security frameworks could transform the CSTO from a reactive military bloc into a proactive guarantor of regional stability.

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## BRICS Counter-Terrorism Strategy

The BRICS has been taking note of developments in international conflicts, especially those in Africa and West Asia. The issue of security has been a priority for BRICS since the beginning. The national security advisors of the BRICS countries have been meeting since 2009 to expand dialogue on security issues and exchange information. To streamline these efforts, a BRICS Joint Working Group on Counterterrorism was also set up, which held its first meeting in 2016. In 2019, the working group decided to constitute five subcommittees on terrorist financing, the use of the Internet for terrorist purposes, countering radicalization, the issue of foreign terrorist fighters, and capacity building. The BRICS Counter-Terrorism Strategy was adopted at the online Leaders' Summit in Moscow on 17 November 2020, and the Counter-Terrorism Action Plan was adopted at the 2021 summit in India. The following is the Counter-Terrorism Strategy of the BRICS nations.



November 17, 2020

### I. Preamble

THE BRICS COUNTRIES (BRAZIL, RUSSIA, India, China, and South Africa) have elaborated this Counter-Terrorism Strategy with the aim of strengthening the security of the BRICS countries. The objective of BRICS counter-terrorism cooperation is to complement and strengthen the existing bilateral and multilateral ties among the BRICS countries and to make a meaningful contribution to the global efforts of preventing and combating the threat of terrorism.

The BRICS countries reaffirm that terrorism in all its forms and manifestations constitutes one of the most serious threats to international peace and se-

curity, and that any act of terrorism, committed by whomever, wherever and for whatever motives and purposes, is a crime and has no justification. The BRICS countries also recognize that acts, methods and practices of terrorism in all its forms and manifestations are activities aimed at the destruction of human rights, fundamental freedoms and democracy, threatening territorial integrity, security of States, and that the international community should take the necessary steps to enhance cooperation to prevent and combat terrorism, including cross-border movement of terrorists. They are also convinced that terrorism cannot and should not be associated with any religion, nationality, civilization or ethnic group.



## II. Principles

The BRICS countries' counter-terrorism cooperation is based on the following principles:

- \* full respect for the sovereignty of the participating countries and noninterference in their internal affairs;

- \* commitment to the principles of international law and recognition of the central and coordinating role of the United Nations on the issues of peace and security;

- \* recognition of the role of regional organizations in countering the threat of terrorism;

- \* need for all States to refrain from organizing, instigating, facilitating, participating in, financing, encouraging or tolerating terrorist activities and to take appropriate practical measures to ensure that their territories are not used for terrorist bases or preparation or organization of terrorist acts intended to be committed against other States or their citizens;

- \* due consideration of national interests and priorities;

- \* openness, information sharing, and consensus-based decision-making;

- \* recognition of the decisive role of States and their competent authorities in combating terrorism and extremism conducive to terrorism with due account for national experience and countries' specificities;

- \* inadmissibility of using terrorist groups, or issues pertaining to countering international terrorism and extremism conducive to terrorism, for political ends;

- \* adoption of a comprehensive approach to combating terrorism;

- \* rejection of double standards on countering terrorism and extremism conducive to terrorism;

- \* addressing of the conditions conducive to the spread of terrorism and attach full importance to countering the extremism conducive to terrorism.



The 16th Meeting of the BRICS Summit was held from October 22 to 24, 2024, in Kazan, Russia, under the theme “Strengthening Multilateralism for Fair Global Development and Security” (Photo: bric.br, 2025).

## III. Goals

The BRICS countries will:

- \* strengthen their unity in countering international terrorism and its financing;
- \* consider undertaking concerted measures against those involved in organizing, instigating, facilitating, participating in, financing, encouraging or tolerating terrorist activities;
- \* call upon all nations to take appropriate measures to prevent the use of their territories for terrorist bases or the perpetration or organization of terrorist acts intended to be committed against other States or their citizens;
- \* deepen their cooperation to reaffirm the support for the central and coordinating role of the UN in combating international terrorism, the need for strict and full implementation of the relevant UN Security Council resolutions related to counter terrorism, comprehensive implementation of the UN Global Counter-Terrorism Strategy in a balanced way, and implementation of the provisions of the relevant international counter-terrorism conventions and protocols;
- \* counter the global threat of terrorism on the basis of the purposes and principles of the UN Charter, relevant UN Security Council resolutions and international counter-terrorism conventions and protocols, where applicable;
- \* improve the practical cooperation among security and law-enforcement authorities to prevent and combat terrorism, including by sharing timely and accurate information, and consider, if necessary, creating legal framework for such sharing;
- \* suppress the facilitation of terrorist groups, entities and associated persons by not making available to them any resources, such as human, financial, or material, including weaponry;
- \* undertake steps to improve relevant necessary measures to strengthen border and customs con-

rols in order to prevent and detect the cross-border movement of terrorists, including by comprehensively using, whenever appropriate, international databases on terrorism and the consolidated list of sanctioned individuals and groups by the UN Security Council;

- \* utilize BRICS Counter-Terrorism Working Group to strengthen intelligence and information sharing and cooperation on terrorist organizations listed by the UN Security Council;
- \* pursue collectively the adoption of a Comprehensive Convention on International Terrorism;
- \* prevent further geographical expansion of terrorism and address the threats posed by terrorists returning from conflict zones to countries of departure or traveling to third countries;
- \* facilitate research and development on measures to counter terrorism;
- \* counteract to the growing links, where applicable, between forms of transnational organized crime and terrorism;
- \* undertake all necessary measures to ensure that any person who participates in the financing, planning, preparation or perpetration of terrorist acts or in support of terrorist acts is brought to justice, with due respect for human rights and fundamental freedoms, and that such terrorist acts are established as serious criminal offence in their domestic laws;
- \* enhance cooperation in the sphere of mutual legal assistance and extradition, in conformity with their domestic laws and regulations, to afford the widest measure of assistance in connection with investigation or criminal proceedings against terrorists;
- \* counter extremist narratives conducive to terrorism and the misuse of the Internet and social media for the purposes of terrorist recruitment, radicalization and incitement and providing financial and material support for terrorists;
- \* counter public calls for and incitement of terro-



A photo from the 2025 Leaders Summit in Rio de Janeiro  
(Photo: Isabela Castilho/BRICS Brasil, 2025).

rism and extremism conducive to terrorism;

- \* strengthen cooperation against the misuse of information and telecommunication technology for terrorist and other criminal purposes; create counter-narratives disrupting the propaganda of terrorist and extremist ideas conducive to terrorism;

- \* broaden their counter-terrorism cooperation with the United Nations, as well as the G-20 and the FATF;

- \* strengthen de-radicalization cooperation to address conditions conducive to the spread of terrorism by education, skills development and employment facilitation while recognizing that none of the conditions can excuse or justify acts of terrorism.

- \* cooperate to address the threat of terrorism in all its forms and manifestations;

- \* promote capacity building, including training, experience sharing, and technical cooperation in counter-terrorism efforts;

- \* promote public awareness and participation in counter-terrorism efforts, as well as enhancement of inter-faith and intra-faith dialogue.

### IV. Conclusion

The BRICS High Representatives for Security shall be entrusted with leading the review of the implementation of this Strategy, and the BRICS Counter- Terrorism Working Group (CTWG) shall be entrusted with its implementation.

The CTWG may discuss to consider elaborating a Plan of Action containing specific measures to implement this Strategy fully and effectively in due course.

(Source: University of Toronto BRICS Information Center. Retrieved from July 15, 2025, from <http://www.brics.utoronto.ca/docs/2020-counterterrorism.html>)



## Statement of the Council of Shanghai Cooperation Organization Heads of State on Countering Radicalization Leading to Terrorism, Separatism, and Extremism

The fight of the Shanghai Cooperation Organization against the “three evils” is an important chapter in the story of the organization. The “three evils”, also called “three evil forces,” refer to terrorism, separatism, and extremism. The concept was first defined in June 2001 during the first SCO summit. Taking regional security and stability as a priority, the SCO has been making unremitting efforts to crack down on the “three evils.” The Shanghai Cooperation Organization (SCO), an exemplary organization in cooperation in the fight against terrorism, has achieved significant regional and international successes since the early 2000s. The following is the statement on countering terrorism, separatism, and extremism that was declared by the SCO Heads of State at the 2023 summit.



July 04, 2023  
New Delhi, India

Member States of the Shanghai Cooperation Organization (SCO or Organization),

Adhering to the spirit of mutual trust, mutual benefit, equality, mutual consultation, respect for cultural diversity, and the pursuit of common development in the

interest of strengthening peace, security, and stability in the region,

Reaffirming the commitment to the principles of sovereignty, territorial integrity, non-interference in internal affairs, and other provisions of the SCO Charter,

### SCO Regional Anti-Terrorist Structure's (RATS) Background and mission

#### Executive Committee of the SCO RATS

The Agreement on establishment of the Regional Anti-Terrorist Structure designated as a permanent body of the SCO was signed during a meeting of the Council of Heads of State of the SCO Member States on June 7, 2002, in St. Petersburg.

Since its establishment, the Regional Anti-Terrorist Structure of the Shanghai Cooperation Organization (SCO RATS) has made a significant contribution to the development of the Organization and has become its supporting pillar and coordinating center in combating terrorism, separatism and extremism at the re-

gional and global levels.

The international prestige of RATS grows year on year, as it turns into an estimable example of multilateral cooperation that ensures tangible success in the field of security.

At the stage of development of the RATS, the main focus was on the establishment of an organizational and legal framework that determined the principles and areas of cooperation and ensured proper functioning of its working bodies, namely the Council and the Executive Committee.

Later, improvement of the regulatory framework was an important factor for successful implementation of joint measures by the competent authorities of the SCO member states to counter terrorism, extremism and separatism. This work is accompanied by introduction of provisions of relevant international law and



Determined to strengthen SCO law enforcement and security cooperation, promote multi-lateral cooperation, strengthen coordination at the global, regional, and national levels, insist on equal, cooperative, indivisible, comprehensive, and sustainable security, and counter traditional and non-traditional security challenges and threats,

Noting the provisions of the Shanghai Convention on Combating Terrorism, Separatism, and Extremism; the SCO Convention against Terrorism and the SCO Convention on Countering Extremism; and the Agreement on Cooperation of SCO Member States in the Field of International Information Security,

Calling upon the international community to strengthen global cooperation to combat terrorist threat, with the UN playing a central role through full implementation of relevant UN Security Council Resolutions and the Global Counter-Terrorism Strategy in accordance with the UN Charter and

the principles of international law, without politicization and double standards, respecting the sovereignty and independence of all States and to seek consensus on the adoption of a Comprehensive Convention against International Terrorism,

Reiterating that any act of terrorism is criminal and unjustifiable,

Emphasising the inadmissibility of States using terrorist, separatist and extremist groups and their accomplices to implement particular political and geopolitical goals,

Recognizing that radicalization leading to terrorism, separatism and extremism has become a global problem, the spread of radical ideologies by terrorist groups and their sponsors, including on the Internet, religious intolerance, aggressive nationalism, ethnic and racial discrimination, ideas of fascism and chauvinism, have a negative impact on the minds and world view of primarily young people,

legal acts of the SCO into national legislations.

As part of the rule-making activities of the RATS, the Conventions of the Shanghai Cooperation Organization on combating terrorism, separatism and extremism, as well as decisions that regulate practical cooperation between the competent authorities of the SCO Member States in the field of security and define formats, mechanisms and instruments of their direct interaction when combating terrorism, separatism and extremism, were developed and approved by the Council of Heads of State of the SCO Member States,

Under the framework of the RATS, with the Executive Committee as a coordinator, targeted work is being carried out to build the counter-terrorism capacity of the SCO member states. To this end, they design and carry out joint practical activities.

Among the most efficient types of activities are the annual Joint Anti-Terrorist Exercises which are being held since 2006. They allow practicing the use of the response mechanisms and training interaction between the competent authorities in order to neutralize various terrorist threats and prevent terrorist attacks.

Each exercise is designed to be as close to real life as possible, reflecting the actual conditions of the operational situation emerging in the SCO space and the tactics of terrorists.

A separate area of ensuring the security of the SCO member states from transnational crimes associated with terrorism, such as illegal migration, smuggling of drugs, weapons, explosives, etc., is the mechanism for interaction between the border services of the competent authorities of the SCO member states.

Noting the increase, including during the COVID-19 pandemic, in the use by terrorists and their supporters of the Internet and other information and communication technologies, including social networking platforms, for the dissemination and propaganda of radical ideologies for terrorist purposes, including recruitment and incitement to commit terrorist acts as well as the financing, planning and preparation of terrorist activities,

Reaffirming the leading role of States and their competent authorities in countering radicalization leading to terrorism, separatism and extremism, as well as the importance of efforts made in this direction by international and regional organizations,

Advocating active interaction of the SCO with other interested states, regional and international organizations in this field,

Noting the systematic efforts of the SCO Regional Anti-Terrorist Structure (RATS) to combat radicalization, including through the implementation of the

2022-2024 Programme of Cooperation of the SCO Member States in Countering Terrorism, Separatism and Extremism,

Hereby declare the following:

Member States, while strongly condemning terrorism in all its forms and manifestations, committed by whomever, wherever, and for whatever purpose, stress that terrorism should not be associated with any religion, civilization, nationality, or ethnic group.

Member States will further develop cooperation in countering radicalization that leads to terrorism, separatism, and extremism, including by sharing experiences and best practices, in accordance with the SCO Charter and generally accepted principles and norms of international law.

Member States will continue to implement the SCO 2022-2024 Programme of Cooperation in Countering Terrorism, Extremism, and Separatism

Since 2013, the border services of the competent authorities of the SCO member states have been conducting joint operations on the external and internal sections of their borders.

Under the Joint Working Group of Experts comprising representatives of the competent authorities of the SCO member states and the Executive Committee of the RATS, which has been operating since 2013, measures are taken consistently to prevent terrorists and extremists from abusing the Internet for their criminal purposes. In addition, joint exercises are held to counter terrorist activities in the global network to improve interaction mechanisms.

An important part of improving the system of countering terrorist threats is building the capacity of anti-terrorist structures. A systematic work is carried out to facilitate coordination of personnel

training and further development for anti-terrorist units of the competent authorities of the SCO member states.

In order to consolidate efforts to counter terrorism, separatism and extremism, the SCO RATS develops and strengthens cooperation with international and regional organizations, as well as the competent authorities of the SCO observer states and dialogue partners.

In particular, memorandums and agreements on cooperation were signed with the Executive Directorate of the Counter-Terrorism Committee of the UN Security Council, the UN Counter-Terrorism Office, the UN Office on Drugs and Crime, Interpol, the Anti-Terrorism Center (CIS ATC) and the Coordination Service of the Council of Commanders of the Border Troops of the CIS Member States, the

and national programs to counter radicalization.

Member States will exchange practical experience on how to ensure the security of major international events held on the territory of SCO member states.

Member States advocate promoting regional cooperation to counter radical ideologies that lead to terrorism, separatism, and extremism, as well as denying their supporters the means and opportunity to pursue their activities.

Member States will conduct media campaigns at the national level to prevent and counter radicalization leading to terrorism, extremism, and separatism.

Member States will implement programs at the national level to rehabilitate and reintegrate radicalized individuals into society and prevent their return to radical ideology or terrorist activity.

Member States support the important role of the media, civil society, business community, religious, cultural, educational and other organizations in sha-

ping an environment conducive to preventing and countering radicalization.

Member States advocate strengthening the role of women and youth in countering radicalization.

Member states intend to make joint efforts to block and remove radical and terrorist content from the Internet, initiating the necessary measures against identified individuals and entities in accordance with the domestic laws of SCO Member States.

Member States will continue to cooperate in countering radical ideology and propaganda by promoting ideas of peaceful coexistence of states, respect for religious and cultural diversity, social cohesion and dialogue among civilizations.

(Source: Shanghai Cooperation Organization website (2023). Statement of the Council of SCO Heads of State on Countering Radicalization leading to Terrorism, Separatism and Extremism. Retrieved July 15, 2025 from, <https://eng.sectsc.org/20230704/1628358.html>)

Secretariat of the Collective Security Treaty Organization (CSTO), the Eurasian Group on Combating Money Laundering and Financing of Terrorism, the Central Asian Regional Information and Coordination Center for Combating Illicit Trafficking in Narcotic Drugs, Psychotropic Substances and Their Precursors (CARICC), the Secretariat of the Conference on Interaction and Confidence Building Measures in Asia (CICA), African Center for the Study and Research of Terrorism, as well as with the KGB of the Republic of Belarus, the Ministry of Foreign Affairs of Afghanistan, and Counter-Terrorism Coordination Council of Mongolia.

Contacts have been established with dialogue partners, namely the competent authorities of Sri Lanka, Turkey, Cambodia, Nepal, Azerbaijan, Armenia, Egypt, Qatar, Saudi Arabia, the United Arab

Emirates, Maldives, Myanmar, Kuwait and Bahrain, and work is underway to formalize the relationships.

Officials of the Executive Committee of the RATS regularly participate in the preparation and holding of meetings of the Council of the Heads of State, the Council of the Heads of Government, Secretaries of Security Councils, the Council of Foreign Ministers and the Council of National Coordinators of the SCO Member States.

The key outcomes of the SCO RATS activities are annually reviewed at meetings of the RATS Council and reported to the Council of the Heads of SCO Member States.

(Source: CSTO website, (n.d.). RATS Background and Mission. Retrieved July 15, 2025, from <https://ecrats.org/en/about/history/>)



# A Political Economy Critique of the Globalizing Impact of the World Economic Forum



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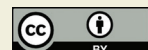
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## A Political Economy Critique of the Globalizing Impact of the World Economic Forum

### ABSTRACT

The World Economic Forum has been questioned and criticized for its influence on globalization for many years, but it has not received sufficient attention from the academic community. In Marx's capital accumulation theory, this study constructs a theoretical framework for systemically critiquing the "spatio-temporal fix" logic of international monopoly capital. Historical materialist analysis unveils the WEF's structural incapacity to mediate the endogenous dual paradox engendered by globalized capital accumulation. It indicates that the so-called "international economic cooperation and exchange" it promotes is, in essence, the reconstitution of an accumulation system through which monopoly capital groups transfer surplus value through geographical expansion.

**Keywords:** capitalist rent-seeking, crisis of economic globalization, global accumulation of capital, neoliberalism, spatio-temporal fix.

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### Introduction

THE WORLD ECONOMIC FORUM (WEF), also known as the "Davos Forum" due to its first meeting held in Davos, Switzerland, in 1971, has traversed over half a century of development in a complicated and volatile international political and economic situation. It has exerted profound and extensive influence on the globalization and expansion of the world economy, the evolution and reconstruction of the international economic order, the guidance and direction for the flour-

ishing of the world economy, and appeals for and promotion of responses to global economic crises. However, the economic history of capitalism shows that the long-term existence and development of forums have failed to solve the universal problems of economic globalization. For instance, Dambisa Moyo, a neoliberal economist, admitted at a 2017 forum themed "Globalization Governance" that globalization has indeed "suffered a considerable loss," and "I do not know what remedial measures can be taken under the present situation (Saval, 2024)."

From the perspective of the organizational mode, this stems mainly from the fact that the system and mechanism of the WEF have realized a systematic and comprehensive transformation in the rapid development of economic globalization. Firstly, its functional objective has shifted from enhancing the core competitiveness of European enterprises to promoting international economic cooperation and exchange. The founder and executive chairman of the forum, Professor Klaus Schwab of the University of Geneva in Switzerland, originally intended to promote and apply to the European business community the stakeholder theory he had drawn from the advanced management experience of US enterprises in the 1960s. That is, to maximize the long-term interests of the enterprise, managers should not only serve shareholders but also all related interest groups, to guide European enterprises to enhance their international competitiveness through innovative management methods and effectively cope with the massive pressure of market competitiveness from US enterprises. Therefore, the three consecutive forums from 1971 to 1973 focused on discussing building the relative competitive advantages of European enterprises. However, after the forum was held successfully in January 1971, the US-led Bretton Woods system collapsed in August of that year and exited the historical stage. As a result, the capitalist economic order was severely affected, with the formation and emergence of capitalist stagflation. Thus, the forum's development goals gradually shifted to find a way to improve international economic cooperation and exchange to preserve the stability of the capitalist economic system and achieve the full recovery and long-term development of the capitalistic economy. Klaus Luft, the former vice chairman

of Goldman Sachs Europe, summed it up: "This is precisely because of globalization and also reflects globalization (Ren, 2022)."

**Many hot issues of globalization, in fact, have not been resolved effectively due to the enormous concern of the The World Economic Forum (WEF); instead, they have been further intensified.**

Secondly, its focus has shifted from concentrating on innovation in modern enterprise management to cooperation in global economic governance. Klaus Schwab initiated the WEF as the European Management Forum in 1971. The primary focus was on boosting the international competitiveness of European enterprises by implementing innovative management practices. However, in 1987, it was officially renamed the World Economic Forum, aiming to "study and discuss issues in the world economy, promote international economic cooperation and exchange, and concentrate on public-private cooperation to improve the state of the world." The European Management Forum began its transformation and development in 1974, as the forum invited political leaders to the annual meeting beginning in that year. So the focus of the content has undergone a substantive transformation, widening from business management to numerous fields of world politics and economy, and shifting from a European orientation to the capitalist camp led by the USA. Therefore, the "European Management Forum" has been more in name than reality. Since then, the themes of the annual meeting have revolved around the hot-spot issues of the world economy and have expand-



ed to cover a wide range of areas, including global geopolitics, policy negotiation, social stability, and environmental governance. In particular, in 1987, the forum began to include the foreign economic and trade issues of underdeveloped countries in its discussions, thus taking on a truly “global” form, often referred to as the “Economic United Nations” or the “bellwether of the world economy.” However, in general, they are all based on the global political and economic order to formulate the global governance mechanism to contribute to the long-term stable development of the capitalist world economy.

Finally, its actions shifted from an unofficial communication platform for private enterprises to semi-official public-private partnership institutions. Schwab’s initial motivation for advocating

the establishment of the European Management Forum was to provide a platform for business managers in Western Europe to improve their management skills by accepting and applying stakeholder theory; the forum initially self-identified and publicly claimed to be a non-profit, non-government organization. However, the concept of stakeholders theoretically includes all entities related to the interests of an enterprise, not only shareholders but also directly related ones such as consumers, managers, employees, and related enterprises, as well as indirectly related ones like the home country, host country, and other countries with business ties, governments, international institutions, and regional organizations. This provides an a priori hypothesis for the subsequent public-private partnerships.

Since 1974, it has become routine for the forum to invite national leaders to its annual meetings. In 1982, the participants were expanded to include other government members and leaders of international economic institutions. More importantly, the forum began to employ former national leaders or party officials from developed capitalist countries as managers of its institutions. This pattern not only expanded the depth and breadth of the forum's topics, which were no longer confined to the scope of business management, but also became a form of public-private partnership and an effective way for national politics to influence the development of the world economy logistically.

**Many newly independent countries that had escaped from colonial rule after World War II mainly chose the path of industrialization that developed countries took to pursue development. However, the results were only marginally satisfactory, and the imbalance in the world economy has worsened significantly.**

Many hot issues of globalization, in fact, have not been resolved effectively due to the enormous concern of the WEF; instead, they have been further intensified.

Firstly, economic crises were even more destructive due to the forum's initiatives. The forum alleviated partly the effects of the global economic crisis. Still, it did not fundamentally eliminate or effectively prevent the cyclical emergence and systemic

spread of crises: examples include the oil shock in Europe and the USA from 1973 to 1975, the global stock market crisis in 1987, the financial crisis in Southeast Asia from 1997 to 1998, the US subprime mortgage crisis from 2007 to 2009, and the European sovereign debt crisis from 2010 to 2011.

Thus far, the world economy is still growing sluggishly due to the effects of these crises, and high inflationary pressure and unemployment rates remain widespread in various countries. According to the "World Economic Outlook 2023," the growth rate of global output was projected to drop to just 1.9% in 2023, hitting a multi-decade low. It was expected to rebound to approximately 2.7% in 2024, falling short of the roughly 3% recorded in 2022. Meanwhile, the IMF predicted that the global average inflation rate would decline to 6.8% in 2023 and 5.2% in 2024, yet it would remain above the pre-COVID-19 pandemic level of around 3.5%.

Secondly, the imbalance in the world economy has become more apparent. Generally, due to the significant differences in the development process and path pattern of industrialization among different countries throughout history, the "North-South gap" between developed countries, between developed and developing countries, and especially between developed and underdeveloped countries, has been continuously expanding due to the self-reinforcing effect of path dependence. Importantly, many newly independent countries that had escaped from colonial rule after World War II mainly chose the path of industrialization that developed countries took to pursue development. However, the results were only marginally satisfactory, and the imbalance in the world economy has worsened significantly. Although the emergence of the forum has stabilized the world economic order and provided a relatively stable competitive environment for less developed





"In 1982, at the first informal gathering of world economic leaders organized as part of the Forum, US President Reagan, addressing the participants via satellite, explicitly demanded that the capitalist camp maintain its position of opposition to the socialist camp led by the Soviet Union." A picture from the First Informal Gathering of World Economic Leaders (Photo: WEF website, n.d.).

countries, it has also offered more favorable development opportunities for the economic prosperity and crisis response of developed countries. In the winter 1995 issue of *Foreign Affairs*, it was noted that while over 20 countries were rich, only about 10 were closing the gap with them, while the gap between 140 or more countries and the rich countries was widening. The "World Economic Situation and Prospects 2022" produced by the United Nations Department of Economic and Social Affairs (UN DESA) shows that the gap between rich and poor among different countries and within countries has become even wider after more than 20 years of development. The World Bank also reported that the output levels of developed countries in 2023 will basically recover to the pre-COVID-19 pandemic level, while most developing countries will be about 4% lower than

before the pandemic, and some others will even be about 8% lower. The World Bank President, David Malpass, described the situation: "Global macroeconomic imbalances have reached an unprecedented level" (Li, 2022).

Finally, anti-globalization has a strong political edge. The endogenous gene of anti-globalization has not completely degenerated during the forum's promotion of globalization, integration, and the liberalization of the world economy. Politicization has always been present and repeated in line with the interests and demands of hegemonic power. For example, during the first informal gathering of world economic leaders at the forum's 1982 annual meeting, US President Reagan publicly demanded that the capitalist camp maintain the oppositional Cold War position against the socialist camp led by the former Soviet Union.

He urged obstructing close economic ties with the Soviet Union and promised that the USA “would work together with our allies.” Former US Secretary of State Condoleezza Rice said at the 2008 forum, “Despite the subprime mortgage crisis, we still have deep confidence in the fundamentals of the global economy and will continue to put the belief in a free economy into practice” (Er, 2008). However, the forum has remained unmoved or has paid no heed to the trade protectionism initiated by the USA and other developed capitalist countries, the attempts to decouple and cut off supply chains from China, the so-called “de-risking” measures, high-tech sanctions, and Trump’s “America First” policies, all of which run counter to the mechanisms of free competition and the contractual spirit. Bob Sternfels, the global managing partner of McKinsey & Company, who participated in the release of the “Global Cooperation Barometer” in 2024, for example, said with a studied understatement, “We have used too many divisive terms, such as ‘decoupling’” (Yu, Yan, & Xu, 2024), but—he went on—it is not about bringing the word “decoupling” but rather the word “cooperation” into Davos. Such a statement of neither breaking nor establishing is not reassuring in pursuing the forum’s mission and declaration. More seriously, the neoliberal values of the forum have led to its obvious double standards, exposing an instrumentalist nature that is prone to being “politicized” and “weaponized.” The forum successfully facilitated the signing of a non-aggression agreement between Greece and Turkey in 1988, known as the “Davos Declaration,” and also played a role in resolving several similar armed incidents that occurred subsequently. However, the situation was quite the opposite in 2022. On the one hand, in re-

sponse to the military conflict between Russia and Ukraine, unilateral sanctions were imposed on Russia. Not only were Russian government officials sanctioned, but ordinary Russians were also prohibited from participating in the forum.

**Employing a historical materialist analysis, it demonstrates that the WEF’s neoliberal orientation inherently embodies insurmountable structural limitations in addressing and preventing global economic crises, thereby failing to substantively advance balanced and sustainable economic globalization.**

On the other hand, there are comprehensive criticisms of the relevant actions taken by Russia. These include George Soros’ “theory of China and Russia posing a threat to the free world” and the EU’s response of imposing an oil embargo on Russia, as well as Ukrainian President Zelenskyy’s criticism and appeal for Western countries to unite in the face of external threats. Even in 2024, Zelenskyy was still invited to publicly accuse Putin and emphasize to Western countries the importance of continuing to support Ukraine to defeat Russia that year. Meanwhile, 18 Asian and 12 African countries attended the Forum meetings, including the four BRICS countries of India, Brazil, Saudi Arabia, and South Africa. However, the consistent double standards of the Biden administration (USA) in supporting Israel during the Israel-Palestine conflict, along with Zelenskyy’s

support for Israel, have undoubtedly deepened the differences in political stances and widened the breach in relations with the Global South.

Therefore, the WEF has long been questioned and criticized, with dissenting voices never ceasing. One representative argument suggests that the forum, influenced by neoliberalism, primarily serves as a means of control that protects the core interests of large capitalists and facilitates their monopolization of global wealth distribution. Some even consider the forum to be the initiator of the polarization of world wealth, the destroyer of the natural environment, and a threat to social peace and stability.<sup>1</sup> Larry Summers, a vigorous advocate of globalization, former chief economist of the World Bank, and economic advisor to former

US President Obama, for example, holds the extreme belief that the “free market” can solve all social problems. He even proposed blatantly that “the optimal behavior for rich countries to deal with toxic waste is to decide to dump it in poor countries, simply because it is more economical.” Thus, the forum is often criticized for not only failing to contribute to the development of economic globalization but also potentially leading it astray. Consequently, economic globalization has been opposed superficially, with the essential critique of capitalist hegemonism being overlooked in a case of “missing the forest for the trees.” Neoliberalism cannot escape the historical limitations of capitalism and cannot understand the exploitative nature of the globalization of private monopoly capital.



“Under the neoliberal paradigm that dominates the WEF, the institution not only proves structurally incapable of proposing effective governance strategies for global economic crises but also perpetuates the squandering of capital resources through rent-seeking activities” (Photo: Bluediamondgallery, n.d.).



Therefore, they cannot propose effective countermeasures to solve the crisis of capitalist economic globalization. Regrettably, contemporary academic inquiry exhibits three structural deficiencies rooted in political-economic analysis. Firstly, historical materialist frameworks fail to adequately theorize the critical interrogation of the World Economic Forum's neoliberal ideological orientation. Secondly, the dual instrumental nature of its globalized influence—simultaneously constituted as mechanisms for capital accumulation coordination and vectors of crisis displacement—has yet to be systematically dialecticized in scholarly discourse. A particularly revealing aspect is the lack of a materialist critique that deconstructs the institution's structural impotence in addressing capitalism's cyclical crises, especially its inability to overcome the metabolic contradictions between globalized productive forces and capital's transnational accumulation regime.

In light of this, grounded in Marx's theory of capital accumulation, this study constructs a theoretical framework for systematically critiquing the "spatio-temporal fix" logic of international monopoly capital. Employing a historical materialist analysis, it demonstrates that the WEF's neoliberal orientation inherently embodies insurmountable structural limitations in addressing and preventing global economic crises, thereby failing to substantively advance balanced and sustainable economic globalization.

The so-called key global economic governance issues are institutional solutions to the contradictions of extractive accumulation in global capital accumulation. The forum mechanism under the domination of capital logic is unable to overcome the parasitic accumulation characteristics of imperialism as revealed by Lenin, nor can it solve the structural ruptures in capital circulation

between center and periphery countries in light of time-space compression, as pointed out by Harvey. This institutional paradox leads to a dialectical and confrontational evolution between capitalist economic globalization and deglobalization; that is, the more the expansion impulse of capital accumulation relies on global spatial reorganization to achieve value appreciation, the more it deconstructs the existing accumulation system through the cross-border opposition between labor and capital. It is evident that due to the profit-seeking, exploitative, and monopolistic nature of capital globalization and its accumulation and evolution laws, they play a fundamental and decisive role in economic globalization. Therefore, if the world economic order does not undergo reform, reconstruction, and institutional innovation, the liberal policy framework and deliberative system of the forum will be unable to effectively alleviate and prevent the capitalist crisis associated with economic globalization while also achieving balanced and sustainable development.

### **The Major Issues of the World Economic Forum Influencing Globalization**

On the question of influencing globalization, one of the major problems with the WEF is that it not only has certain interests in and connections with transnational monopoly capital, but that, to a considerable extent, it may also be subject to the dominant impact of transnational monopoly capital. The globalized accumulation of capital serves as the root cause of cyclical crises characterized by relative overproduction in the world economy. Consequently, under the neoliberal paradigm that dominates the WEF, the institution not only proves structurally incapa-



"The World Economic Forum's membership capital demonstrates structural symbiosis with its corporate members' capital accumulation processes, materially manifested through capital circuits operationalized in initiatives like the Tropical Forest Alliance and Global Plastic Action Partnership"  
(Photo: [globalplasticaction.org](http://globalplasticaction.org) ve [tropicalforestalliance.org](http://tropicalforestalliance.org), n.d.).

ble of proposing effective governance strategies for global economic crises but also perpetuates the squandering of capital resources through rent-seeking activities. Furthermore, this operational logic intensifies the spatial-temporal contradictions of monopoly capital, thereby amplifying the crisis's destructive impacts across globalized value chains.

### **The connection between the WEF and capital interests**

The forum's operating agency mainly consists of two parts: the Fund Board and the Management Committee. The former is the highest authority of the forum, responsible for the behavioral decision-making of the forum's strategic planning and targets. The latter is the permanent administration of the forum, responsible for organizing and

implementing, managing services, and arranging activities. The important foundation for their normal functioning is that the forum has a balanced income and expenditure and a continuous investment of monetary funds.<sup>2</sup> The major sources of these funds are the profits of member enterprises and their donations. Therefore, the forum has specific interests that align with private capital, particularly transnational monopoly capital.

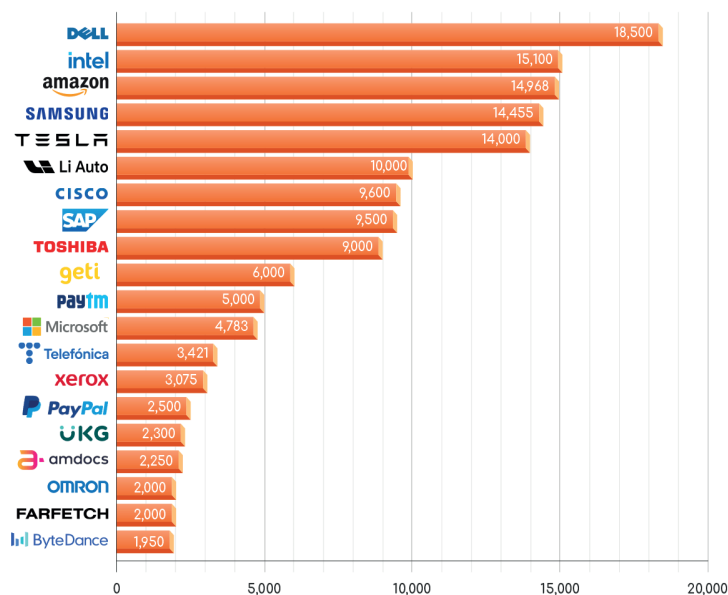
In addition to the direct accumulation of constant and variable capital, private capital also undergoes indirect accumulation in a roundabout way, which is known as "capital rent-seeking." Capital rent-seeking generally functions in two major ways. In domestic settings, capital is invested in non-productive political fields, and the monopolistic resources are obtained by influencing government policies, which is called "power rent-seeking."



In foreign settings, capital is invested in non-productive international economic organizations, and the reconstruction of the international economic order is guided by influencing the world economic outlook and international economic cooperation among governments, thereby maintaining future monopolistic power, which is referred to as “expectation rent-seeking.”<sup>3</sup> Both of these rent-seeking behaviors squander the surplus value currently available for direct production and instead channel capital into the potential capital accumulation that may be achieved in the future. The difference is that “power rent-seeking” is capital directly “kidnapping” the government, influencing its regulation, and achieving an unequal monopolistic distribution of resources in the short term, and “expected rent-seeking” is capital’s indirect “inducement” of macroeconomic policy coordination among governments, influencing the globalization of the world market and achieving an unequal monopolistic distribution of resources in the long term. In 2004, the forum established the “Global Young Leader” award to improve the performance of “rent-seeking” and expand the forum’s global influence. It selects young talents with primary influence and development potential from different industries in various countries to strengthen cooperation with it and serve the realization of its global strategic planning and targets. This indicates that, compared with other organizations, the WEF has a stronger connection with and is more dependent on capital. If we follow the evolving logic of capital’s form of movement from competition to monopoly, the WEF’s neoliberal tendency makes it difficult to effectively cure the three fundamental natures of capital globalization, namely, its profit-seeking, exploitation, and monopoly, as well as the inherent “chronic disease” of capital formed by its transnational monopoly.<sup>4</sup>

### **Has the WEF reconciled substantively the inherent contradiction between capital’s globalized profit-seeking imperatives and the systemic opportunism endemic to neoliberal financialization?**

The WEF’s ostensible non-profit constitution exists in dialectical tension with the capital-reproduction imperatives of its embedded transnational oligopolies, whose opportunistic investments manifest capital’s self-valorization process through philanthropic institutional capture. The auteurist paradigm in cinematic production—wherein directorial fidelity to aesthetic ontology systematically subordinates commercial viability—exists in structural homology with capital’s subsumption of philanthropic spaces: just as film investors enforce market discipline through profit-reproduction imperatives that inevitably deform artistic integrity, so too does transnational monopoly capital instrumentalize the World Economic Forum’s non-profit façade to advance value-accumulation strategies, rendering any sustainability claims limited by capitalism’s inherent crises. Marx (1976: 254) pointed out incisively that “it is only insofar as the appropriation of ever more wealth in the abstract is the sole driving force behind his operations that he functions as a capitalist, i.e., as capital personified and endowed with consciousness and a will”. More importantly, “nor must the profit on any single transaction. His aim is rather the unceasing movement of profit-making” (1976: 254). “These profits not only form a source of accelerated accumulation, they also attract into the favored sphere of production a large part of the additional social capital that is constantly being created and is always seeking out new areas of investment” (1976: 578). This reveals capital’s

**Graphic. Tech companies that have laid off the most employees in 2024**

Data Source: trueup.io

BestBrokers.com

“Extremely exploitative working systems systematically extract absolute surplus value through time deprivation, while large-scale layoffs by tech oligopolies (such as Microsoft, Twitter, and Apple) artificially expand the industrial reserve army” (Graphic: bestbrokers, 2024).

ontological drive: private capital’s existential purpose transcends ephemeral gain, actualizing as the perpetual pursuit of limitless profit accumulation embedded in capital’s self-valorizing metabolism—a process inherently bound to capitalism’s expansionist totality. The WEF’s nonprofit activities thus constitute a dispositif of neoliberal governance—its philanthropic theater strategically mystifies the extractive operations of “stakeholder capitalism.” No institutional reformism can suspend capital’s law of value, for such “humanitarian” facades are themselves value-forms through which financialized capital resolves its overaccumulation contradictions via the spectacle of ethical production.

The forum’s financial records reveal a distinct pattern of surplus value realization under capi-

talist reproduction cycles. Notwithstanding the tendencies for cyclical crises inherent in capitalist reproduction—manifest in the overaccumulation of capital during the 1973-1974 WELCOM initiative and pandemic-induced disruptions to labor commodification in 2020-2021 that precipitated substantial fiscal deficits—annual surplus maintenance demonstrated an upward trajectory. Fiscal reserves consistently exceeded CHF 10 million across non-crisis intervals, while aggregate member contributions approximated CHF 0.25 billion. This paradox of expanded primitive accumulation amidst stagnation in global capital accumulation rates exposes the dialectical tension between the falling rate of profit and ruling-class fractions’ strategic reinvestment of expropriated surplus under late capitalism.

A statement once quoted by Marx (1976: 254) can explain this seemingly irrational behavior of capital, that is, “Though the merchant does not count the profit he has just made as nothing, he nevertheless always has his eye on his future profit”. This, however, is a dialectical contradiction between capital’s primitive-accumulation-style expansion through exploitative appropriation of surplus value and perpetual capital accumulation in market competition. The “altruism” proclaimed by the World Economic Forum essentially constitutes systematic nurturing of monopoly-finance capital, which ensures the sustainability of super-profit extraction through crisis-prevention institutional mechanisms. Such an evolution of the capital form transmutes the risk-laden value augmentation in anarchic markets into a structural rentier system anchored in global governance architecture, thereby institutionalizing the restructuring of the order of surplus-value transnational distribution while obscuring capitalism’s fundamental contradictions. The World Economic Forum’s membership capital demonstrates structural symbiosis with its corporate members’ capital accumulation processes, materially manifested through capital circuits operationalized in initiatives like the Tropical Forest Alliance and Global Plastic Action Partnership. The forum systematically coordinates transnational monopoly capital’s strategic planning by establishing institutionalized investment governance frameworks. This evolution indicates a strategy for capital valorization that shifts from spontaneous short-term arbitrage to long-term strategic deployment aligned with governance, characterized by planetary-scale value extraction.

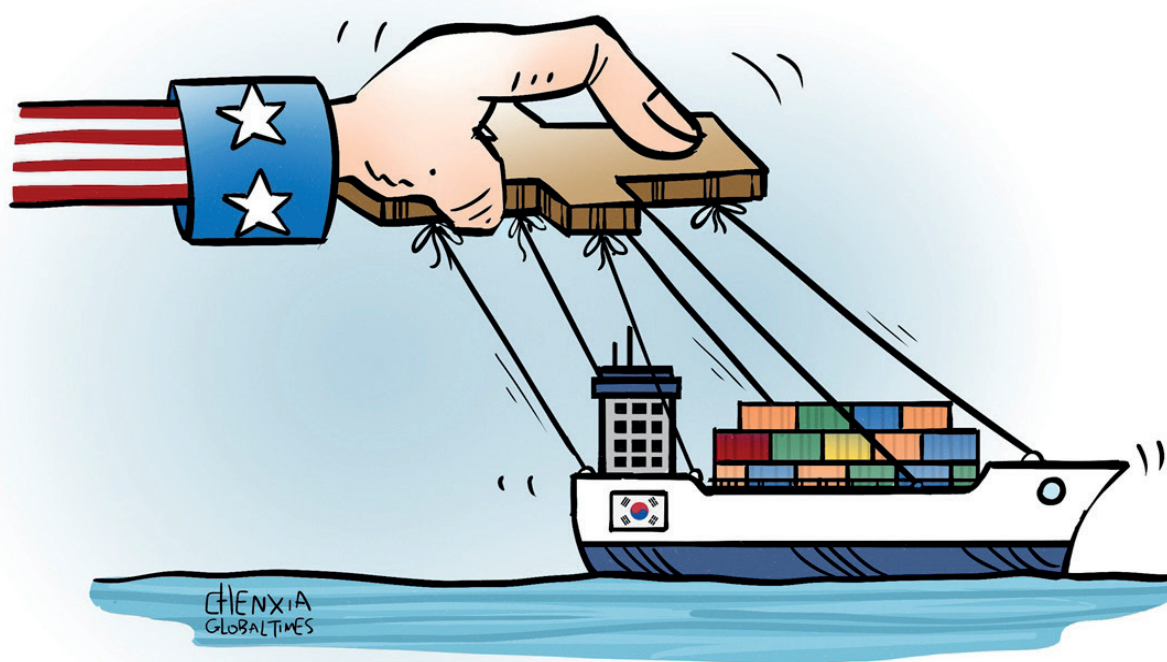
### **Has the WEF critically unmasked the structural asymmetries inherent in the exploitative logic of globalized capital under neoliberal hegemony?**

The WEF’s “stakeholder capital accumulation regime” dialectically reproduces the value-alienation inherent in generalized capital accumulation, while its profit-engineering mechanisms epistemically conceal the unequalized exploitation matrices constitutively engineered within capitalism’s social metabolism. Irrespective of its phenomenological manifestations, capital’s profit remains fundamentally constituted by the expropriative apparatus through which surplus labor—crystallized as surplus value—is systematically appropriated without equivalent exchange. Whether it is industrial capitalism, financial capitalism, or digital capitalism, as long as it is in a system of the private ownership of the means of production, the mode of production in which capital exploits wage labor will not change. What changes are the production methods for directly appropriating surplus value and the distribution forms for indirectly appropriating surplus value?

The universal digitalization of productivity, for example, dialectically intensifies the degree of capital exploitation: extremely exploitative working systems (represented by the “996”/“997” model) systematically extract absolute surplus value through time deprivation, while large-scale layoffs by tech oligopolies (such as Microsoft, Twitter, and Apple) artificially expand the industrial reserve army. This dual mechanism of increased labor intensity and instability, through the real-time optimization of labor redundancy by digital Taylorism, expands the surplus population available for exploitation as described by Marx. So the “stakeholder capitalism” advocated by the WEF con-

stitutes a three-tiered exploitation mechanism: although there is no direct form of exploitation by capital's stakeholders in the forum's performance, their financialized capital achieves a derivative value extraction through the redistribution by rentiers who have already divided the surplus value. It should be noted that this type of extraction is different from the relatively independent and indirect exploitation of different functional capitals that are dispersed. Instead, it is a concentrated and relatively united form of indirect exploitation. That is to say, to a certain extent, the forum has accelerated and facilitated an organized alliance among capitalists with different functions, which entails a unified exploitation of wage labor by the entire bourgeoisie and also manifests what Marx foresaw as the "collective capitalist" (*Gesamtkapitalist*). Furthermore, this kind of exploitation will not only

fail to narrow the wealth gap in capitalism but also continuously widen the inequality of polarization. The historical record conclusively refutes the neoliberal myth of Kuznetsian optimism—five centuries of capital's historical motion demonstrate that bourgeois society's "wealth polarization law" systematically intensifies exploitation matrices. What Kuznets' inverted-U hypothesis framed as transitory inequality now stands exposed as capital's eternal law of motion: the inexorable concentration of surplus-value in financialized circuits, wherein expanded reproduction perpetually widens the gulf between capital's organic composition and labor's subsistence wage basket. Thomas Piketty used nearly 300 years of historical data on wealth and income in Europe and America to verify the continuous intensification of inequality in capitalist countries (Piketty, 2014).



"With the deepening process of capital liberalization, inequality within the capitalist-dominated global economic system has been intensifying" (Cartoon: Global Times, 2025).



Joseph Stiglitz (2018) pointed out that the average real income of the top 1% in the United States increased by 169% from 1980 to 2014, while the median household income only rose by 11%. In particular, wage growth was significantly slower than productivity growth, which is basically consistent with the intensification of exploitation. It was concluded that “the law of accumulation excludes every diminution in the degree of exploitation of labor and every rise in the price of labor, which could seriously imperil the continual reproduction, on an ever larger scale, of the capital relation” (Stiglitz, 1976: 771-772).

**The imbalance in the development of the world economy has never been discussed specifically. Even when it comes to the issue of the growth of pauperization in developing countries, it has never touched upon the topics of domestic and international exploitation or increasing the welfare of the majority. Furthermore, China’s experience in eradicating absolute poverty has also been ignored, with a lack of any further discussion and extensive publicity.**

Throughout the themes of the WEF’s annual meetings over the years, we discover that the focus has expanded gradually from economy and management to other fields such as public policy, social governance, climate and environment, and

international disputes. However, the imbalance in the development of the world economy has never been discussed specifically. Even when it comes to the issue of the growth of pauperization in developing countries, it has never touched upon the topics of domestic and international exploitation or increasing the welfare of the majority. Furthermore, China’s experience in eradicating absolute poverty has also been ignored, with a lack of any further discussion and extensive publicity. A more serious issue is the absence of representatives from the working class or labor unions at the annual meetings, which prevents them from advocating for their reasonable interests against capital. Isn’t such an approach supposed to be the essence of the forum’s mission? Otherwise, how could the highly progressive World Social Forum<sup>5</sup> make a fresh start and compete with the WEF (Ding, 2006)?

**Has the World Economic Forum substantively attenuated the dialectical tension between capital’s globalized monopoly formation and the regulatory paradoxes embedded in transnational governance frameworks?**

The globalization paradigm promoted by the WEF manifests a historically bounded character that fails ultimately to transcend its stated objectives, conditioned fundamentally by the inexorable laws of capitalist accumulation. The operational logic of capitalist accumulation undergirding the WEF manifests tripartite determinations: in its material foundation through economic backing from transnational monopoly capital, in its teleological orientation toward valorization dynamics of transnational oligopolies, and in its procedural mechanism for strategic channeling of capital flows. This triadic articulation not only adapts to but also accelerates the



globalization of monopolistic competition under late capitalism.

The World Economic Forum has engineered a neoliberal institutional reform in its funding apparatus, transforming the unstable participation fee model that general non-profit forums mainly rely on into an incentive model that prioritizes stable and guaranteed membership fees and strategic partner equity participation fees, with participation fees playing a secondary role. This structural recomposition entrenches capital logic through the structural embeddedness of accumulation regimes, prioritizing capitalized membership dues and equity participation fees from strategic partners over contingent participation fees. These members are classified mainly into four types of partnerships based on their participation in forum activities: industry, strate-

gic, quasi-strategic, and regional. All of them are multinational enterprises with total revenue or assets exceeding 5 billion US dollars and ranked among the top 1000 globally. They possess "pillar" or "dominant" market power in their respective industries and regional economies.<sup>6</sup> The so-called pillar partners can have a decisive impact on the overall strategy of a specific industry, a particular region, or even different industries and regions. By contrast, leading partners are mainly global growth enterprises that play a leading role in the future development of industries and regions (Song, 2016). Therefore, the member enterprises carefully selected by the WEF have three basic attributes: transnational penetration, concentrated accumulation, and monopolistic hegemony. They fully reflect the organization of leading transnational monopolistic capital.

The few owners who determine the enterprises, namely the controlling shareholders, are the personification of leading transnational monopolistic capital. Does such an arrangement not raise the question of the “credibility orientation” of the forum?<sup>7</sup> Does this organic composition not dialectically necessitate the forum’s structural complicity in reproducing capital’s metabolic domination through its governance protocols?

Further discussion reveals that the profit-seeking nature of capital determines that monopoly capital exists if and only if, for the realization of monopoly profits, evolving and operating exclusively through the metabolic process of profit accumulation. This inherent motion necessarily crystallizes into transnational configurations of monopoly capital—or more precisely, capital’s globalized monopolization—the spatial-temporal dynamics of which are structurally accelerated by the WEF’s institutional architecture. The 1960s witnessed the ascendance of transnational corporations as historical vehicles for capital’s spatial fix, a process superseded in the 1970s by financialized capitalism’s global metabolic regime. This dual movement qualitatively transformed monopoly capital’s globalization trajectory, which is different from the traditional monopolization of market investment in foreign securities. Instead, it utilizes foreign direct investment to monopolize and control the industrial economic chain of the host country of this investment and, to the greatest extent, excavate and seize its residual value. This behavior is also regarded as a typical feature of neo-imperialism (Cheng, 2019). The WEF’s emergence constituted a historically conjunctural apparatus that structurally aligned with the valorization imperatives of monopoly capital’s globalization. Its institutional architecture facilitates oligopolistic capital blocs’ rentier-aligned coordination matrices to allocate in a predatory manner future global monopoly profits.

Marx pointed out that “world trade and the world market date from the sixteenth century, and from then on the modern history of capital begins to unfold” (1976: 247). Further, the competition on the world market is “being the very basis and living atmosphere of the capitalist mode of production” (Marx, 1981: 205). With the expansion of the world market, capital accumulation has been exported from domestic to foreign, evolving from disorderly individual free competition to a large-scale and orderly monopolistic game. It has shifted from industrial monopoly to national monopoly and then to monopoly by multinational enterprises, from multinational enterprise alliances, mergers, and acquisitions to joint ventures and other forms of outward expansion. Additionally, by “selflessly” supporting the WEF and further strengthening the so-called “public-private partnership,” these efforts aim to promote a form of globalization characterized by “private production unchecked by private ownership” (1981: 569). Through the globalization of capitalism, the movement aims to establish and consolidate the permanent international monopoly position of capital (Robert, 2020). and ultimately seeks to achieve the global unification of the transnational bourgeoisie (Robinson, 2009). This evidence indicates that the global influence of the WEF has played a typical proactive role in the evolution and advancement of the movement of monopoly capital.

### **The Formation Logic of the Paradox of the Globalization Impact of the World Economic Forum**

The limitations of the WEF’s influence on the process of economic globalization are rooted in the inherent logic of the dual paradox of capital accumulation, which can also be defined as the influence paradox in the process of globalization

by the forum. Capital accumulation, through the operational mechanism of the forum, has formed the function of dynamic balance regulation in specific historical contexts during the evolution of the capitalist global economic system. The inherent operational logic within the mechanism of free competition will inevitably lead to structural imbalances in the system dominated by transnational monopolistic capital. Even if such inherent contradictions are temporarily alleviated through short-term policy interventions, their fundamental resolution still depends on a systematic reconstruction of the power structure of capital. During the 2018 WEF Annual Meeting, which coincided with the 10th anniversary of the global financial crisis, then British Prime Minister Theresa May stated that the UK would firmly uphold the principles of free trade and the “global rules” system and advocated deepening the construc-

tion of relevant mechanisms. Even against the backdrop of the UK having initiated the Brexit process, the country continued to play a leading role as a key advocate of the global free trade system (Deng, 2018). US President Donald Trump (2018) also said, “We implemented the broadest deregulation. I promised to eliminate two unnecessary regulations for every new one added”.

With the deepening process of capital liberalization, inequality within the capitalist-dominated global economic system has been intensifying. Nobel laureate in economics Joseph Stiglitz emphasizes that the root cause of global polarization “does not lie in the process of globalization, but in the inherent contradictions of the capitalist system” (Ren, 2022). This assertion is theoretically corroborated by the empirical research conclusions of Thomas Piketty based on cross-century economic data (Piketty, 2014).



“From the establishment of the forum in 1971 to the onset of the 2008 global financial crisis, financial capital underwent a qualitative transformation into a derivatives-dominated accumulation regime”  
(Photo: WEF website, 2024).



The inherent inevitability of this capital logic has led to the continuous accumulation of systemic risks in the global economy, which in turn has forced multinational monopolistic capital groups to implement a contraction of the globalization system driven by the demand to maintain profits. This reveals that the forum can only offer superficial governance solutions to the structural imbalances in the process of capitalist globalization. It cannot address the inherent contradictions in the capital accumulation mechanism, which is the deep-seated problem. This governance limit is essentially determined by the inherent paradox of capital growth and spatial expansion.

### **The WEF's difficulties in effectively alleviating the historical roots of inherent imbalances in the capitalist global economic system**

The institutional commitment of the forum has always revolved around the discussion of the desirability of “building a new order of international cooperation.” Jagdish Bhagwati, an authority on international economics at Columbia University, argued that, based on the theory of comparative advantage, free trade can achieve a trickle-down effect of “high growth rate decline in poverty rate” through a growth transmission mechanism (Saval, 2024). Free trade agreements under the capitalist framework essentially build a collaborative proliferation network for transnational monopolistic complexes of capital, achieving adaptive reproduction of the capitalist world system through the global reorganization of factor allocation. The dual effect of this institutional arrangement lies in maintaining the dynamic balance of the center-periphery structure while continuously reinforcing the North-South divide through technological monopolies,

financial leverage, and intellectual property barriers. The practical logic of this eventually leads to underdeveloped countries being trapped in a debt-based accumulation trap and forming a mechanism for the reproduction of poverty through being locked at the lower end of the global value chain.

This phenomenon is determined by the generating mechanism of the geographically uneven development of capital accumulation. Essentially, it is the institutionalized manifestation of the contradiction of time-space compression in capitalism's production of space. This regional disparity has a dual structural dimension: in the historical dimension, it is manifested as the time-lag effect of primitive accumulation; in the spatial dimension, it forms a gradient of potential difference in the transfer of surplus value. The two together constitute the unbalanced geographical landscape of capital expansion. The divergence in the path of capitalist transformation stems from the diachronic break of primitive accumulation. This break, which is characterized by the time lag of the “property rights revolution” as defined by Brenner, results in asynchronous establishment of institutions. In the process of breaking through the threshold of expanded reproduction, this time-lag effect interacts in complex ways with the pre-modern institutional legacies of specific regions, ultimately forming a topologically differentiated spectrum in the accumulation system. This interactive process essentially constitutes the spatio-temporal concretization of the “integration/marginalization” dual movement in Wallerstein's world-system theory.

Overall, capitalism spread gradually from the major Western European countries that first began colonial expansion to the North American colonies, and then it was further implanted in the later-developing regions of Asia, South America, and

Africa from the advanced capitalist regions of Europe and North America. Deficiencies in the accumulation system of late-developing countries are rooted in the dual predicament of original accumulation deficits and a lack of scale in potential energy. This structural dependence is essentially the spatialized practice of Amin's theory of "unequal development." Historically, capitalist hegemony has undergone three spatio-temporal iterations: commercial capital hegemony (the Netherlands in the 17th century), industrial capital hegemony (Britain in the 19th century), and financial capital hegemony (the United States in the 20th century). Currently, it is undergoing a paradigmatic reconstruction to become digital capital hegemony (platform capitalism). Each hegemonic cycle corresponds to the iteration of the accumulation system in Braudel's chronology of the world economy and obeys the law of technology-institution symbiosis in Kondratieff's long-wave cycle. The evidence indicates that the evolution of capitalism presents an accumulation paradox of increasing levels of systemic vulnerability, with each hegemonic cycle deepening rather than resolving its institutional fractures. As the Marx-Polanyi dual-movement theory reveals, from the integration of colonial plundering in the stage of commercial capitalism to the derivative transfer of crises in the stage of financial capitalism and up to the extraction of data value in the stage of digital capitalism, this systemic imbalance exhibits the feature of technologically enhanced efforts at spatial repair. The profundity of Schiller's insight lies in that digital capitalism, by reconfiguring the mechanism of "technological rent" appropriation, upgrades the traditional center-periphery structure into a new hierarchy of computational hegemony and data colonialism, which is essentially the topological transformation of the law of growing organic composition of capi-

tal in the cybersphere (Schiller, 1999).

From the perspective of the logic of the topological reconstruction of capitalist accumulation, the unevenness of the capitalist world system is a self-reinforcing feature of the mechanism of the production of space. According to Arrighi's theory of systemic cycles, the accumulation advantage of the core area has always been based on a triple-nested structure: the layer of technological monopoly (Dutch navigation technology/British steam engine/US chip), the layer of institutional hegemony (Westphalian system/gold standard/Bretton Woods system), and the layer of value coding (silver standard/pound hegemony/dollar-data dual circulation). This topological reconstruction forces the peripheral regions into a state of "gradient lock." This development went through two major stages: outward diffusion before the late 1870s and inward accumulation, especially after World War II. The former was characterized by vertical trade division between the core and peripheral countries before the free flow of capital was achieved on a global scale. The latter, under the premise that the free flow of capital was basically realized on a global scale, was dominated by horizontal intra-industry trade division and foreign direct investment among core countries, leading to the continuous deepening of the imbalance in economic development among regions at different levels.<sup>8</sup>

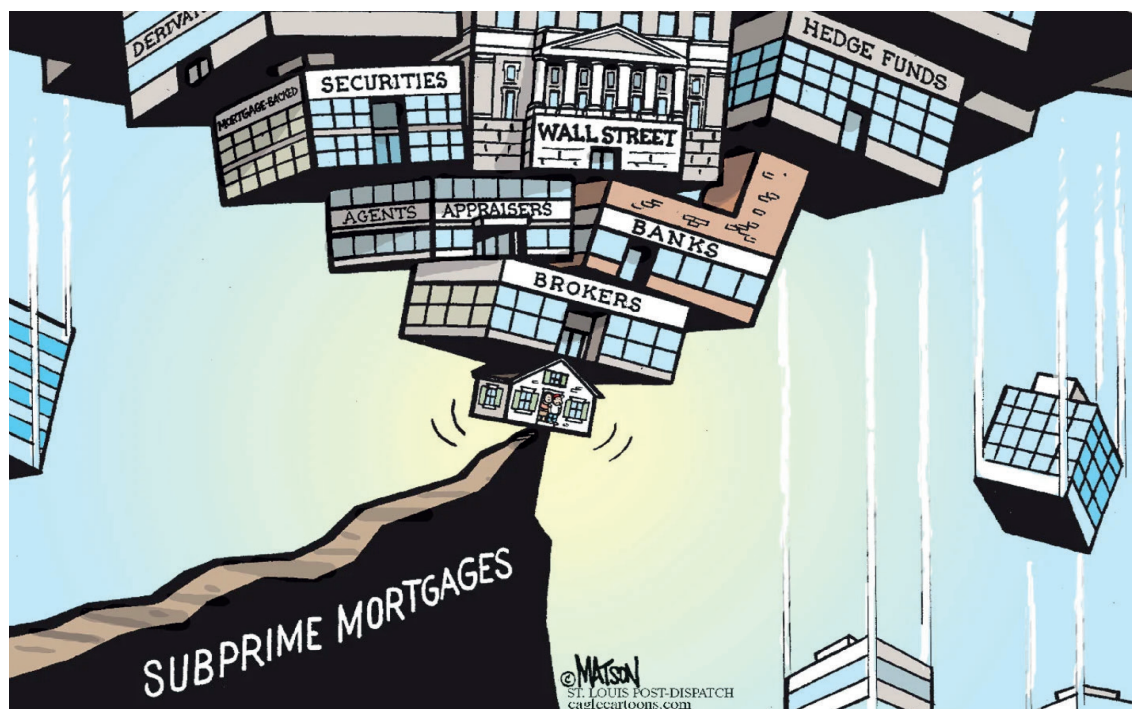
Anwar Shaikh, based on the long-term economic fluctuation data of nearly 500 years of capitalism as compiled and statistically analyzed by Maddison, found that during the stage of concentric outward diffusion, the overall living standards of the global capitalist economic system have maintained an upward trend, but the economic growth of some developing countries in Asia and Africa has stagnated or even declined over a period of almost 300 years.

What is more serious is that the ratio of per capita GDP between the most developed and the least developed regions was 2.2 in 1600, slightly rose to 2.4 in 1700, further increased to 2.8 in 1820, and then soared to 6.7 in 1900. By 2000, it had risen to an astonishing 18.5 (Shaikh, 2005). Over more than 200 years of capitalist globalization, the inequality of economic growth has jumped by 5.6 times. Even if a few peripheral countries break through the bottleneck constraints of the system, their distribution is still quite unbalanced, and they all have exclusive comparative advantages that are difficult to replicate. Thomas Weiskopf, for example, made a statistical comparison of the 20 countries and regions with a population of over one million in the Third World that had the fastest growth in output value since 1950. Among them, five were oil-producing countries, two were regions with developed service industries, and five were the regions and countries that received the most aid from the USA (Wilber, 1979). Furthermore, during the inward accumulation stage of the concentric circle system of globalization, Susan Berger and Ronald Dore's statistics indicate that free-flowing global capital has been highly concentrated in developed capitalist regions, especially in the USA and EU countries, since the 1980s. The total volume of global foreign direct investment also showed a significant downward trend, but instead, it was inwardly accumulated and expanded in the capitalist core regions after the 1990s (Berger & Dore, 1996: 72-73). In 1986, the EU's process of market integration made a breakthrough, and this landmark event became a paradigmatic practice for the transformation of the system of global economic governance from global integration to regional aggregation. From this perspective, both the core and peripheral regions of the capitalist economic system are showing a trend toward generalizing institutional regional integration arrangements. This practice

not only strengthens the institutional barriers of regional protectionism but also, through the effect of gradient locking, gives rise to the spatial fragmentation of the global value chain. Eventually, it leads to the emergence of a new model of asymmetric capital accumulation under the centrifugal reconstruction of globalization. It is no surprise that during the opening ceremony of the 1994 Forum Annual Meeting, German Chancellor Helmut Kohl urged European countries to adopt more unified approaches to address unemployment, tackle the new challenges of the global economy, and sustain Europe's competitive position in international trade and investment.

### **The WEF's difficulties in effectively alleviating the structural contradictions behind the destructive effects of capitalist economic crises**

The forum has never conducted a relatively objective discussion on or evaluation of the structural contradictions behind the destructive effects of capitalist economic crises. Taking the severe impact of the 2008 global financial crisis on the world economy as an example, Condoleezza Rice, then US Secretary of State, emphasized in her keynote speech at the forum that the US economy still had strong risk-resistance capabilities, its institutional framework was inherently reasonable, and its long-term fundamentals remained stable (Quotations from the 2008 World Economic Forum Annual Meeting, 2008). Chevron's CEO, David O'Reilly, explained at the Energy Industry Leaders' Roundtable that the U.S. economy has an inherent self-correcting mechanism. He held a cautiously optimistic stance regarding the possible extent of cyclical adjustments and, based on the effectiveness of market mechanisms, believed that its long-term prospects remain positive ("Quotations from the 2008 World Economic Forum Annual Meeting," 2008). How-



**"I THOUGHT WE WERE JUST BUYING A HOUSE!"**

"The global financial crisis triggered by the 2008 US subprime mortgage crisis has made it increasingly obvious that the trend of economic globalization, which was led by the developed countries in the West, has gone into reverse" (Cartoon: Baker Library, n.d.).

ever, from the perspective of international political economy, the current situation presents three paradoxes. First, the capitalist economic system shows a trend of de-globalization, and there is a structural contradiction between its appearance and internal logic. Second, the international community finds it difficult to reach a global consensus on establishing a systematic solution in the face of cyclical economic crises. The current governance framework, more seriously, has failed to effectively regulate the regular trend of developed economies transferring crisis costs to developing countries, especially peripheral economies, through systemic risk transfer mechanisms such as monopolistic capital flows and debt chains. Third, at its core, the deep-seated problem of the current predicament of global eco-

nomics governance lies in the inherent institutional flaws of the world capitalist system. This dilemma is specifically manifested as the structural imbalance between the excessive accumulation of financial capital and the development of the real economy under the neoliberal globalization paradigm, the fundamental conflict between the profit extraction mechanism of transnational monopolistic groups and large-scale socialized production, and the ultimate contradiction between the infinite nature of capital accumulation and the limited capacity of the ecological system to bear it. These systemic failures are precisely the inevitable outcome of the inherent contradictions of capitalist accumulation as revealed by Marx's theory of capital circulation in the stage of financial capitalism.



Marx (1976: 667) pointed out that “the capitalist mode of production, while it enforces economy in each individual business, also begets, by its anarchic system of competition,” and “the fact that the movement of capitalist society is full of contradictions impresses itself most strikingly on the practical bourgeois in the changes of the periodic cycle through which modern industry passes, the summit of which is the general crisis (1976: 103).” This historical inevitability is rooted in the inherent contradiction of the capitalist mode of production: on the one hand, the increase in the organic composition of capital drives the maximization of the rate of surplus value; on the other hand, the shrinking effective demand of laborers leads to the dilemma of realizing surplus value. As Marx showed in Volume III of *Capital*, “Since the first general overproduction crisis in Britain in 1825, the contradiction between the unlimited nature of value increment and the limited capacity of the market has always been an insurmountable constraint on the expanded reproduction of capitalism.”

The historical evolution of financial capital exhibits the characteristics of distinct phases. From the 1870s to the 1960s, it primarily served as a lubricant for industrial capital’s circulation, with its operational logic subordinate to the demands of expanded reproduction. From the establishment of the forum in 1971 to the onset of the 2008 global financial crisis, financial capital underwent a qualitative transformation into a derivatives-dominated accumulation regime. This shift represents the contemporary evolution of the dominance of financial capital as described by Lenin (1981: 598), manifesting itself in three dimensions :

1) The creation of self-propagating systems detached from the real economy through financial engineering technologies such as capital securitization and leverage operations;

2) The formation of a global arbitrage network centered on Wall Street and the City of London un-

der the wave of neoliberal globalization;

3) The resultant severe divergence between the global virtual economic scale (618 trillion in 2023, BIS data) and output of the real economy (global GDP of 104 trillion), exposing the fundamental contradiction of financialized capital accumulation. Marx held that “their market values receive a determination differing from their nominal values, without any change in the value of the actual capital (even if its valorization does change). (...) It is determined not just by the actual revenue but rather by the anticipated revenue as reckoned in advance.”

**A reversal of the “deindustrialization” model of capitalist production towards “reindustrialization,” and also drove the evolution and development of financial capitalism into digital capitalism (the global market value of cryptocurrencies exceeded 2 trillion US dollars, and venture capital investment in artificial intelligence reached 93.5 billion US dollars), resulting in the emergence of a new form of “surveillance capitalism” as described by Shoshana Zuboff.**

Thus, when there is an excess of production capital in the commodity market, the financial market can draw this in and integrate it into the cycle of accumulation of financial capital, which is known as “deindustrialization” (He et.al., 2021).<sup>9</sup> This has a positive effect in alleviating the crisis of overpro-

duction. The monopoly capital school represented by Harry Magdoff and Paul Sweezy (1987) found that when Keynesianism was at a loss in dealing with the stagflation of Western capitalist economies in the 1970s, the rapid expansion of speculative financial capital promptly absorbed the economic surplus of the commodity market, reducing the destructive nature of the stagflation crisis while accelerating the deindustrialization trend of capitalism. David Harvey further explains that the transformation from the primary circulation of capital in productive sectors to the secondary circulation mediated by the state and financial institutions is a sign of financial capital's dominance over socialized production.<sup>10</sup> According to statistics, the proportion of the refinancing of monopoly capital debt to GDP has risen from 20% in 1980 to 116% in 2007. The global MBS market size reached 12 trillion US dollars in 2008, the CDS market size soared from 0.6 trillion US dollars in 2001 to 62 trillion US dollars in 2008, and the Federal Reserve's holdings of securities reached 8.3 trillion US dollars in 2023. Therefore, Sweezy refers to this process as the "financialization of the capital accumulation process" (Sweezy, 1970).

However, Marx (1981: 596) was once convinced that, "no matter how these transactions are multiplied, the moment these promissory notes become unsaleable, the capital of the national debt remains purely fictitious." Further, "in the way that even an accumulation of debts can appear as an accumulation of capital, we see the distortion involved in the credit system reach its culmination" (1981: 607-608). The monopoly capital school represented by John Foster and Fred Magdoff has deepened Marx's theory on financialization, pointing out that excessive accumulation of financial capital not only fails to promote the sustainable growth of the capitalist economy in the long term and evolves into a compound crisis form of coexistence of overcapacity in

the real economy and bubble expansion in the virtual economy under the accumulation system dominated by financial capital, but also intensifies the severity of financial crises (Magdoff & Foster, 2014). The global financial crisis of capitalism in 2008 was unprecedented in its destructiveness (IMF data showed that global GDP shrank by 0.1% and the unemployment rate peaked at 8.5%) and revolutionary in its impact on the capitalist mode of production. It prompted a reversal of the "deindustrialization" model of capitalist production towards "reindustrialization," and also drove the evolution and development of financial capitalism into digital capitalism (the global market value of cryptocurrencies exceeded 2 trillion US dollars, and venture capital investment in artificial intelligence reached 93.5 billion US dollars), resulting in the emergence of a new form of "surveillance capitalism" as described by Shoshana Zuboff. Overall, speculative financial capital has promoted the "deindustrialization" process by absorbing excess production capital in the real economy, which helps alleviate the risk of overproduction in the short term. However, excessive "deindustrialization" will lead to the scarcity of production capital in the real economy and intensify the excessive accumulation of financial capital, thereby continuously increasing the risk of financial crises. Eventually, this risk will spread from developed capitalist countries to other countries and regions, triggering a global financial crisis and pushing capitalist economies into a new round of the "reindustrialization" stage. As a result, the accumulation of productive capital and financial capital has shown a structurally cyclical change in a "W" shape that slopes downward to the right. Economic development history indicates that although the forum has to some extent promoted this structural capital accumulation, it has not effectively reduced the scope and severity of the impact of financial crises in the global capitalist system.

### **The WEF's difficulties in effectively alleviating the real predicament of global conflicts and divisions under capitalism**

In the 1996 forum, which was themed around “The Globalization of Progress,” Schwab emphasized that global economic integration had become an irreversible trend. Jean-Claude Trichet, then governor of the Central Bank of France, also pointed out at the meeting that no country could escape this process of global economic integration. However, the global financial crisis triggered by the 2008 US subprime mortgage crisis has made it increasingly obvious that the trend of economic globalization, which was led by the developed countries in the West, has gone into reverse. According to WTO statistics, the average trade dependence of G7 countries decreased by 9.6 percentage points from 2009 to 2022, and the number of tariff and non-tariff barriers increased by 43%, confirming Paul Krugman’s theoretical deduction of the “trilemma of international trade.” This crisis not only intensified the implementation of trade protectionist measures but also posed a severe challenge to the global model of economic cooperation based on neoliberalism. The global economic governance system based on neoliberalism has shown institutional decline, specifically manifested as:

- 1) The proportion of multilateral trade agreements dropping from 82% in 2000 to 61% in 2022;
- 2) The average number of cases handled by the WTO dispute settlement mechanism decreased by 37%;
- 3) The coefficient of global FDI flow volatility expanded to 2.3 times that before the crisis.

Even Summers, a staunch defender of neoliberalism, has changed his stance, acknowledging that the crisis has led to a slowdown in the economies of developing countries, while developed countries have struggled to shake off its impact. Paul Krugman had

already pointed out before the outbreak of the financial crisis that the globalization dominated by neoliberalism had a “guilty conscience” (Saval, 2024).

In this regard, the annual theme of the forum has evolved from “Shaping the Post-Crisis World” in 2009 to “Strengthening Cooperation in a Fractured World” in 2023 and then to “Rebuilding Trust” in 2024.

The focus of the discussions has consistently been on promoting sustained cooperation and restructuring for the development of the global capitalist economic system. However, the forum’s efforts at systematic reform over the past fifteen years have yet to achieve the expected results. In the current global economic landscape, the “divided situation” formed by ideological boundaries remains a structural obstacle to the process of a new type of equal economic globalization and the recovery of the world economy. More controversially, the Western countries led by the United States have, through systematic policy tools (including supply chain decoupling, technology disconnection, and the so-called “de-risking” strategy), essentially constituted a systemic violation of the principle of market fairness. The World Bank’s 2023 report shows that the non-symmetric regulatory measures set by G7 countries against emerging markets have increased by 28% year-over-year. This exclusive competitive strategy aimed at maintaining technological hegemony has been criticized by international observers as a “new type of economic coercion.” More seriously, in line with the old and unequal international political and economic order, developed capitalist countries are empowered to set rules and standards and can maintain high monopoly profits. Taking the global climate governance system as an example, the per capita carbon emissions of OECD countries are 3.2 times those of developing countries (World Bank data from 2022). Yet, they shift 70% of the emission reduction costs to latecomer manufacturing countries through carbon border

adjustment mechanisms. The unequal distribution of global carbon emission rights is a hegemonic act that “strangles” and “puts shackles on” the relatively equal industrialization of developing countries. As with the older form, the neo-colonial and neo-imperialist systems are the root causes of undermining mutually beneficial global economic cooperation.

**From the perspective of the historical logic of the movement of capital, the current real predicament can be attributed to the cyclical law of monopoly capital accumulation. During the paradigm shift of the capitalist form from “deindustrialized” financial capitalism to “reindustrialized” digital capitalism, the major capitalist countries have systematically advanced the system of trade protectionist policies.**

From the perspective of the historical logic of the movement of capital, the current real predicament can be attributed to the cyclical law of monopoly capital accumulation. During the paradigm shift of the capitalist form from “deindustrialized” financial capitalism to “reindustrialized” digital capitalism, the major capitalist countries have systematically advanced the system of trade protectionist policies. The strategic goal is to improve the efficiency of global digital industrial capital accumulation and ultimately create a monopolistic pattern of national competitive advantages that exhibit generational characteristics. This is the basic model of a capitalist

trading power.<sup>11</sup> During the development of capitalism, the Netherlands, as a typical representative of the commercial capital form, was the first to achieve the primitive accumulation of commercial capital under the protection of the government’s mercantilist policies and thus established itself as the first capitalist core country. This evolutionary trajectory not only completed the structural transformation of the capital accumulation paradigm but also achieved the reconstruction of the economic order from regional radiation to global expansion by establishing a global and commercial economic system framework centered on Western Europe. Subsequently, the British government ensured the intensive leap of capital accumulation in the textile industry through institutionalized enclosure movements and legalized industrial policies. During this process, it not only successfully established the hegemonic position of free trade in industrial capitalism but also, relying on the colonial policy system, systematically integrated the late-developing capitalist countries and their colonial economies into the global industrial economic framework dominated by Britain through the institutional arrangement of the center-periphery structure, ultimately achieving the structural reorganization of the capitalist world system. However, empirical studies taking Germany and the United States as typical samples have shown that in response to the development demands of latecomer capitalist countries to break through their “marginalized” economic status, only through a phased industrial protection policy system led by the government and the implementation of strategic industrial cultivation plans can the targeted and optimized allocation of production factors be achieved, thereby establishing a dynamic mechanism for cultivating competitive advantage for participating in global free trade. Friedrich List (2006: 209-210) concluded that “government intervention and the proper use of protective

measures, subsidies and other non-tariff barriers, selective provision of credit, and sometimes even the suppression of competition—all of these can be very helpful for enterprises to strengthen their competitiveness in the world market”. Historical evolution shows that Germany successfully replaced the UK as the core hub in the global industrial capitalist system, while the USA not only achieved the transatlantic shift of the geographical axis of industrial capitalism but also, based on its structural power as the world’s largest creditor, restructured the institutional hegemony of the dollar standard under the Bretton Woods system, thereby completing the construction of the center-periphery system in the global financial capitalist system.

However, from the perspective of the theory of neo-imperialism, the “deindustrialization” accumulation system dominated by US financial capital has caused structural imbalances in capitalist circulation. The shock to the “center-periphery” system resulting from the decline of its hegemony has become the deep-seated cause of the 2008 global financial crisis. In the practice of crisis governance, while facing the historical opportunity presented by the intelligent production revolution, the USA strategically promoted a transformation in the digital capital accumulation paradigm. Through policy tools such as the “Chips and Science Act,” it built barriers to technological nationalism and implemented closed-loop industrial chain projects in strategic fields like semiconductors and clean energy, with the aim of reshaping the hegemony of digital capital and recentralizing the global value chain. At the 2018 Forum Annual Meeting, Trump mentioned, “The world’s largest company, Apple, announced plans to bring back \$245 billion of its overseas profits to the United States. Over the next five years, their total investment in the US economy will exceed \$350 billion (Trump, 2018).” Professor Jia Genliang’s research on

the transformation of the research paradigm of historical institutionalism in developmental economics, which is based on Neo-Lisztism, shows that institutional tariff barriers and industrial protectionist policies implemented during the period of the construction of US economic hegemony essentially constituted a barrier to national economic sovereignty. This strategy gradually formed a closed-loop development mechanism of “import substitution—technology internalization—industrial upgrading” within the 100-year cycle from 1870 to 1970 by systematically excluding the flow of international direct investment.

However, under the cognitive obscuring effect of neoliberal dogma, this “economic nationalism toolbox” that supported the original accumulation of the USA has not only been turned into a theoretical taboo, but its three-stage leap mechanism of “market cultivation—technology absorption—innovation iteration” has also been selectively forgotten in the contemporary narrative of developmental economics (Jia, 2011). Historical practice shows that the core country group generally follows the phased evolution path of “industrial protectionism, completion of technological catch-up, expansion of free trade.” This practical logic of the reconstruction of the center-periphery structure is rooted in the gradient cultivation of dynamic comparative advantages by the strategic system of industry. Only when its organic composition of capital achieves a generational leap can capital globalization enter the stage of large-scale expansion. However, the structural contradiction of excessive capital accumulation will inevitably be periodically intensified, eventually giving rise to a new mercantilist paradigm oriented towards the reconfiguration of the interests of the core countries and forming a long-term cycle of alternating oscillations in capital accumulation between economic globalization and reverse globalization (Cheng, 2003).



## Conclusions and Insights

In conclusion, the globalization impact and transformational development model of the WEF essentially reflects the governance strategy of international monopoly capital to deal with the crisis effect through “spatio-temporal fix.” However, its core concept, rooted in neoliberalism, makes it difficult to achieve substantive results when addressing the inherent parasitic and external expansionary contradictions that accompany the process of capital globalization accumulation. Further speaking, the core of the World Economic Forum’s supposed “purpose”—“international economic cooperation and exchange”—lies in promoting the cooperation and synergy of transnational capital. The long-term focus of the forum on world economic issues emphasizes how it should alleviate the structural imbalances and systemic risks caused by excessive capital accumulation in the process of globalization through international cooperation. In particular, the globalization process advocated by the World Economic Forum is essentially a reconstruction of the global economic system dominated by a few developed countries. This unbalanced governance model has exacerbated the institutional power disparity between the North and the South and has given rise to systemic contradictions, such as the imbalance in global value chain distribution and the cross-border transmission of financial risks. Its development paradigm has significant inherent fragility. It should be made clear that although the neoliberal policy framework of the forum can maintain the superficial stability of the capitalist global economic system within a specific historical cycle, its institutional design has structural flaws in dealing with systemic crises in the long-wave cycle. This paradigm is not only unable to effectively block the crisis transmission mechanism between core and peripheral countries but also fails to curb the increasing marginal returns of monopoly capital. Moreover, it lacks the institutional supply ca-

capacity to regulate asymmetric trade protectionism and reconstruct the global reproduction system and other deep-seated contradictions.

An analysis from the perspective of historical materialism reveals that the historical form of economic globalization is essentially the result of global capital movement. Its fundamental driving force lies in the inherent contradictions, such as value appropriation embedded in the logic of capital accumulation, the alienation of labor-capital relations, and the tendency of market domination, as well as the dual effects of the spatio-temporal repair mechanism of capital accumulation. This dominant inherent logic constitutes the structural constraints of the globalization process. Further speaking, the global agenda of the forum is essentially dependent on the uneven accumulation system of the capitalist world system. This model not only faces a sustainability predicament due to exceeding the material carrying threshold but also maintains the geopolitical economic dominance of the central countries through a technology-financial-digital complex hegemony. Its institutional core has a deep isomorphism with the colonial international division of labor and imperial governance structure. By comparison, studies indicate that the World Social Forum has achieved a substantive transcendence of the neoliberal order in the alternative globalization movement by building a transnational advocacy network. Its theoretical construction of replacing the Washington Consensus with a pluralistic solution to modernity, especially the institutional innovation experiment of integrating global justice demands with the right to decolonized development, has been evaluated by UNESCO as a key social force in reconstructing public goods for global governance. Samir Amin pointed out that the anti-systemic movement of the World Social Forum has substantially weakened the global governance effectiveness of the new imperialism (Amin, 1976). This deconstructive effect is not only reflected in the improvement in the

collective bargaining power of Global South countries, as shown by the suspension of the Doha Round development agenda, but also in the transfer of the right to regulate cross-border capital flows caused by the legitimacy crisis of the International Monetary Fund's structural adjustment policies, as well as the systemic crisis of the neoliberal accumulation system exposed by the 2008 global financial crisis. This provides material conditions for the reconstruction of a new international order that reconfigures the reproduction relationship between the center and peripheral countries. In the absence of institutional supply for the structural transformation of the world system, the neoliberal policy framework of the World Economic Forum can only be trapped in the deep contradictions of the capitalist world system. Its institutional effectiveness not only fails to achieve a stable development path for global capital movement but also, due to the institutional fetishism characteristics of the reproduction process, presents a paradoxical predicament of governance failure and value illusion when periodic economic crises break out.

In today's world, only the establishment and development of new regional economic and political governance organizations and their forums, such as the Belt and Road Initiative for international cooperation, BRICS, and the Shanghai Cooperation Organization, have facilitated truly equal cooperation and effective dialogue in the global economy and have become truly important platforms for high-level multilateral cooperation. China, in particular, has put forward successively seven major initiatives, with the core being the advocacy of building a community with a shared future for humankind and extending to the Belt and Road Initiative, global development, security, civilization, artificial intelligence governance, and the commitment of no first use of nuclear weapons. These have opened up new ideas for the scientific governance of the world economy and politics. 

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### Notes

<sup>1</sup> It is worth noting that the WEF is currently mired in multiple governance crises, and its founder, Schwab, has faced an unprecedented public trust crisis. Reports indicate that the organization has significant institutional deviations in practicing the stakeholder capitalism it advocates: there are serious issues of discrimination against female and Black employees in its internal governance; financial audits have revealed that he is suspected of illegally reimbursing massive personal consumption bills in this so-called non-profit organization; more seriously, its decision-making mechanism shows characteristics of bureaucratic totalitarianism, with 76% of strategic decisions made during 2018-2022 not going through democratic consultation procedures, and there are empirical cases of regulatory arbitrage through offshore financial tools. These problems precisely verify the institutional corruption characteristics of rentier capitalism as described by Mandel. As a result, Schwab was forced to resign on April 21, 2025, marking the official end of the 54-year "Schwab era" of the WEF. In the future, the WEF may face more severe challenges, but it is unlikely to promote a systematic reform of the new management model (Johnson, 2025a; Johnson, 2025b; Tomey, 2025).

<sup>2</sup> From the perspective of historical materialism, the economic base is not only the precondition for social development but also the existence of social organizations. It was precisely because Klaus Schwab, the founder of the WEF, recognized that the forum's funding pattern based on attendance fees was unstable that he decided to switch to the pattern of membership dues in 1976, the fifth year after the forum's establishment. This pattern has been in use ever since. Despite the apparent differences in form,

the operational mechanisms of the two patterns are significantly different. The most crucial difference is that the forum's sponsor will influence the independent decision-making power of the forum's organizer.

<sup>3</sup> The modern "sunspot equilibrium" theory of Neo-Keynesianism is a theory that interprets how economic expectations can be self-fulfilling. It refers specifically to the fact that non-economic factors that occur randomly—like sunspots—can indirectly influence the economic expectations of the majority of people. Whether these expectations have an objective basis or not, they may be realized through the impact on the common behavior of these people. That is to say, "you get what you want." Some historical events, such as the Tulip Fever in the 17th century and the Great Depression in the West in the 1930s, can all be logically explained by the "sunspot equilibrium" theory. From a broader perspective, capital can shape the overall expectations of the future world economy by influencing the strategic positioning and development direction of the WEF, thereby guiding people's economic behaviors and promoting the top-level design and implementation of government policies to achieve the "sunspot equilibrium" of maximizing capital accumulation. However, in accordance with the logic of historical materialism, "the self-fulfilling market expectation" is possible within the historical premise that does not violate the law of social movement, where social existence determines social consciousness. Under such circumstances, human subjective initiative can fully exert its expected guiding role and promote the social economy to move in the "expected" direction. Conversely, if the "expectations" or "confidence boost" are divorced from objective reality, they will degenerate into unrealistic supposition, leading to erroneous decisions and inappropriate actions.

<sup>4</sup> In both Marx's six-volume plan for political economy and the deductive exposition within the three-volume treatise of *Capital*, the endogenous relationships inherent in the nature of capital maintain a fundamental consistency and coherence across theoretical frameworks. This conceptual continuity is manifested through

rough dialectical interconnections between capital's organic composition, its self-valorization process, and its intrinsic tendency toward metabolic domination, constituting an architectonic unity that permeates Marx's critical analysis of capitalist totality. The metabolic imperative of capitalist competition dictates that capital accumulation, achieved through systematic extraction of surplus value, constitutes the sole viable mechanism for maintaining valorization thresholds. This self-reinforcing process engenders monopolistic consolidation via scalar expansion, whose developmental trajectory unfolds dialectically: initially securing domestic market hegemony through technological rent appropriation and labor process intensification, subsequently progressing to transnational monopolization upon reaching domestic accumulation barriers manifested in the deterioration of the rate of profit. Such a spatial-temporal displacement of contradictions temporarily mitigates the tendential law of falling profitability through imperialist rentierism and global value chain arbitrage, while simultaneously intensifying the structural antinomies inherent in capital's world-system.

<sup>5</sup> The World Social Forum (WSF), by explicitly criticizing capitalist globalization, has achieved an "undisputed success" over the decades, as recognized by Samir Amin. This historical development aligns with the material conditions of the evolution of global social movements. It reflects the unfolding and intensification of the fundamental contradictions of capitalism on a global scale. Such liberating practice inevitably restricts the trajectory of changes in the institutional arrangements of capitalism in the new historical stage (Amin, 2007).

<sup>6</sup> The "pillar" market power possesses economies of scale and scope in its industry and region, capable of generating spillover effects; the "dominant" market power has potential economies of scale and scope in the future for its industry and region, that is, as a future "pillar" market power, which can lead the development path of the current industry and region. Thus, the corresponding industries are also called pillar industries and dominant industries.

<sup>7</sup> It is worth noting that although the WEF has certain interests related to private capital, mainly from developed countries, its globalization and significant influence on industry and regional development are an inevitable result of capital accumulation and also reflect the historical stage of the evolution of capitalism. Therefore, if other countries and their private or public capital are to integrate into the general liberalization of economic globalization to maximize their economic interests and further improve the level of social welfare, it is necessary to participate in the forum activities in accordance with the development logic of historical materialism and under certain conditions, and strengthen mutually beneficial cooperation. Since 1979, for example, China has maintained a good cooperative relationship with the WEF, and government leaders have been invited to attend and actively advocated for the establishment of a new type of international economic relationship based on equality and mutual benefit. Up to now, more than 100 Chinese enterprises have become members and strategic partners of the forum.

<sup>8</sup> The systematic study of the underdevelopment of peripheral countries originated from Baran's questioning of Rostow's theory of the stages of economic growth. His idea of unbalanced development has had a profound impact on the subsequent dependency theory, world-system analysis, and the theory of unbalanced geographical development. The author, Cheng Enfu, et al. (2019), proposed the "New Center World System Theory."

<sup>9</sup> He et.al. (2021) have conducted a relatively in-depth exploration of the occurrence mechanism and economic effects of deindustrialization under financial capitalism.

<sup>10</sup> However, Harvey's assertion that the secondary circulation of capital accumulation can also create value is theoretically in conflict with Marx's monism that "living labor is the sole source of value" (Meng, J. & Gong, J., 2014).

<sup>11</sup> The paradigm research on trade powerhouses mainly includes three relatively independent and sharply

contrasting theoretical schools: classical mercantilism, liberalism, and Marxism. Classical mercantilism emphasizes the significance of government industrial protection policies in the stage of primitive capital accumulation for achieving trade power. Liberalism, on the other hand, advocates that during the process of expanded capital accumulation, the regulatory function of the market price mechanism should be fully utilized, and it opposes improper government intervention in free market competition. From an institutional perspective, Marxism critiques the unequal exchange phenomenon resulting from capital accumulation as it transforms into a trade powerhouse. However, by reviewing the trade hegemony history of the Netherlands, the United Kingdom, and the USA, it can be found that these countries share some common characteristics in their development into trade powerhouses, such as institutional innovation, technological innovation, resource monopoly, and discourse power.

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# “Young China” and “Young Chinese”: Enlightenment, New Culture Movement, and New Political Formation in China




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## ABSTRACT

The modernist content of the concept of Young China, first used by Liang Qichao (1873-1929) in 1900, was developed politically and culturally, especially after the 1911 Xinhai Revolution failed in a short time. "New Youth," which can be considered a derivative of "Young China," was not only a magazine name but also at the center of the "New Culture Movement," which is called the first great cultural revolution of the "Young Chinese." This movement describes an intellectual explosion, especially in culture, literature, philosophy, political theory, and women's rights. The spark for this explosion was the patriotic youth struggle that began on May 4, 1919. This movement unleashed great intellectual energy and significantly impacted the political arena. After the discussions during this period, all kinds of monarchist ideas disappeared from China's agenda. May 4 and the New Culture Movement played a significant role in the establishment of the Communist Party of China (CPC) and the spread of modernist ideas to the masses in China. Various organizations and movements belonging to the "Young Chinese," which are part of the "Young" Movements in the world, have raised the flag of "democracy and science" while fighting against "tradition" with nationalist goals. Despite the contradictions between them and nationalism, the Chinese representatives of universalist modernist movements have tried to explain their prescriptions for China's national liberation and establish their ties with nationalism. This period had an essential share in the mental worlds of the cadres who brought New China into being in 1949, reflecting the bond between Marxism and nationalism.

**Keywords:** China, CPC, 4 May, New Culture Movement, New Youth.

## Introduction

"YOUTH" HAS BEEN DEFINED IN THE POLITICAL thought of the 19th and 20th centuries as having value. The fact that old regimes are considered "old" is a manifestation of an understanding that sees the collapse of these regimes as fateful within the framework of a perception of history compatible with natural functioning. Thus, "youth" represents the new, the living. M. Mesnier says that May 4 in China aims to bring about the emergence of the "new man" and that this "new man" is the "young man" because only young people are seen as not sufficiently corrupted by the traditions of the past. It is believed that they can destroy the old culture and become the founders of a new culture and society (Mesnier, 1973: 15).

At the same time, youth has become an essential issue in belles-lettres, firstly in novel characters, in the context of the possibility of building a new "self." In China, especially in a period starting with the New Culture Movement, modernist novelists influenced by the romanticism movement have produced quite voluminous works in terms of quantity, based on the concepts of youth and self, intending to rejuvenate the nation (Jin, 2017: 355-359; Lei, 2017: 295-300; Leo, 1973: 75). Socialist writers, especially Lu Xun (1881-1936), who can be described as social realists in terms of their style, defined tradition as a mental cannibal and imagined the youth of modern China, freed from traditional patterns, through the characters they created (Wang, 2017: 306-310; Leo, 1973: 69).

## Introduction

“YOUTH” HAS BEEN DEFINED IN THE POLITICAL thought of the 19th and 20th centuries as having value. The fact that old regimes are considered “old” is a manifestation of an understanding that sees the collapse of these regimes as fateful within the framework of a perception of history compatible with natural functioning. Thus, “youth” represents the new, the living. M. Mesnier says that May 4 in China aims to bring about the emergence of the “new man” and that this “new man” is the “young man” because only young people are seen as not sufficiently corrupted by the traditions of the past. It is believed that they can destroy the old culture and become the founders of a new culture and society (Mesnier, 1973: 15).



**The 1911 Xinhai Revolution, in a political sense, opened the door to the 20th century in China. However, regarding mentality worlds, the New Culture Movement was one of the most crucial turning points in forming the political-cultural climate that established the 20th century in China, with a revolutionary significance.**

At the same time, youth has become an essential issue in belles-lettres, firstly in novel characters, in the context of the possibility of

building a new “self.” In China, especially in a pe-riod starting with the New Culture Movement, modernist novelists influenced by the roman-ticism movement have produced quite voluminous works in terms of quantity, based on the concepts of youth and self, intending to rejuvenate the nation (Jin, 2017: 355-359; Lei, 2017: 295-300; Leo, 1973: 75). Socialist writers, especially Lu Xun (1881-1936), who can be de-scribed as social realists in terms of their style, defined tradition as a mental cannibal and imagined the youth of modern China, freed from traditional patterns, through the characters they created (Wang, 2017: 306-310; Leo, 1973: 69).

The concepts of “Young China” and “Young Chinese” are part of the “Young-Jeune” movements that emerged in Europe and the Ottoman Empire. As discussed below, these movements influenced the concept in China. However, “Young China and Young Chinese” are not as widespread as “Young Turks” in terms of usage. In this study, the concepts of “Young China and Young Chinese” are analyzed in detail, and the youth movements and modernist ideas that emerged in China in the 20th century are discussed as factors that shaped “Young China.”

The fact that the concepts of “Young China” and “Young Chinese” are not as popular as “Young Turks” or “La Giovine Italia” may be related to the existence of political organizations in China. The “Young” movements in Europe and the Ottoman Empire emerged as secret societies known for their Freemasonry organizational style. Although there were many secret societies in China in the 19th and 20th centuries, the United League of China (Tong-menghui), the Chinese Nationalist Party (Guomingdang),



College students in Zhenjiang, Jiangsu province, hold a flag of the Communist Youth League to celebrate the upcoming 100th anniversary of the May Fourth Movement, April 15, 2019 (Photo: China Daily, 2019).

and the Communist Party of China stood out as nationalist and modernist political organizations representing “Young China.”

The intellectuals who advocated a constitutional monarchy against absolute monarchy, especially reformist Liang Qichao, who first used the concept of “Young China,” came to the fore with their conservative attitudes during the New Culture Movement. For this reason, in this work, “Young China” was not considered a static concept but a dynamic one. The reformist “young people” of the 19th century began to “age” politically and culturally, especially after 1912; representatives of modernist-republican

political and cultural movements began to represent “Young China.” However, as discussed below, the modernist attitudes of the representatives of these movements did not affect their political and cultural thoughts to the same extent.

China has continued to debate its ties to its historical tradition to the present day. The debates between “fathers and sons” were also important during the New Culture Movement. However, while “tradition” was always on the agenda as a topic of discussion, it was no longer possible to defend the legacy of the traditional political system, even with a reformist program.

At the end of this period, it can be said that at least the “republic” idea was dominant in China.

The 1911 Xinhai Revolution, in a political sense, opened the door to the 20th century in China. However, regarding mentality worlds, the New Culture Movement was one of the most crucial turning points in forming the political-cultural climate that established the 20th century in China, with a revolutionary significance.

This study first discusses the birth of the “Young China” concept and its usage in China. The publication works and social relations before the birth of the “New Culture Movement,” in which the “Young Chinese” took their place in the historical scene and shaped themselves both politically, organizationally, and mentally, are discussed. The accumulations in the formation of this movement are pointed out. The May 4 Movement, which sparked the explosion created by this movement, is examined, and the contradictions created by the anti-imperialist line that had to be carried out simultaneously with the occidental emphasis of the “New Culture” are pointed out. Indeed, these contradictions have significantly impacted the discussions of the Enlightenment, and those who defended a different “enlightenment” inherited from tradition within the “New Culture Movement” While drawing attention to the political climate that enabled the spread of modernist ideas such as liberal, anarchist, social democrat, feminist, Marxist, and romantic nationalist, especially in universities and large urban centers, and discussing the foundations on which “Young China” would be established, the role played by this movement in the establishment of the Communist Party of China was emphasized.

### **The Birth of the Concept of “Young China” and the Process That Prepared the “New Culture Movement”**

As T. Weston has also stated, the perspective that attributed the beginning of the “New Culture Movement” to Chen Duxiu’s establishment of the *Youth Magazine* (Qingnian zazhi) in September 1915 and then moved on to the magazine’s mature stages without paying attention to its antecedents is disproportionate by focusing on the peak of the “New Culture Movement” rather than its origins and development, posing the danger of an academic study that is rich in insights into the cultural and intellectual iconoclastic aspects of the movement but weak in terms of its political roots (Weston, 1998: 255).

**The anti-American boycott launched by Chinese merchants in 1905 was strongly supported by students, and many social groups, from dockworkers to small shopkeepers, supported this boycott.**

It is essential to go back to the beginning of the 20th century to discuss the New Culture Movement, which had a revolutionary impact on the mentality of the “Young Chinese,” to grasp the historical background that gave rise to the movement. Of course, the processes that prepared the way for the emergence of “Young China” can be traced back to 1861, when China’s modernization efforts began, or to 1895, when constitutional monarchists were influential and Chinese nationalists emerged. However, in addressing the problem of modernization in China as a mentality problem that will accompany political transformation,





*La Jeunesse*, or *New Youth*, was one of the most influential magazines in modern China. Chen Duxiu, editor-in-chief of the magazine, introduced many new ideas such as individualism, democracy and humanism (Photo: Shanghai Daily, 2017).

the discussions that began on the reasons for the failure of the 1911 Revolution are critical. However, in addressing the issue of modernization in China as a problem of mentality that would accompany political transformation, the discussions that began on the reasons for the failure of the 1911 Revolution are significant. Therefore, it is more functional to start the process that nourished the New Culture Movement as of 1912, along with the birth of the concept. Otherwise, as C. Furth emphasizes, the May 4th and the New Culture Movement that started with it have rich historical precedents, especially between 1898 and 1912, as a campaign against imperialism and cultural renewal (Furth, 1973: 59).

The concept of "Young China" was first mentioned in the *Qingyi bao* (China Discussion) magazine on February 10, 1900, in the work of reformist Liang Qichao titled "Shaonian Zhongguo shuo" (Ode to a Young China). M. Song, who emphasized that it was put forward

as a good new concept to popularize the "ideal of national rejuvenation," later argued that all titles containing "young and youth" were derivatives of "Young China" (Song, 2015: 28). In the decades following Liang's invention of "Young China," especially in the Republic's first decade, youth became the central symbolic figure of almost all social reforms and cultural and political revolutions in modern China (Song, 2015: 15-16).

The name "Young China" can be seen more commonly after 1912. Huang Yuangyong (1885-1915), who was a friend of Chen Duxiu (1879-1942), who published the *New Youth* magazine at the center of the "New Culture Movement," and one of his influences, published the weekly *Young China* newspaper in January 1912. This newspaper was republished weekly under the same name by Wang Guangqi (1891-1936) as the publication organ of the "Young China Society" during the May Fourth Period (Song, 2015: 28-29 and 101).

It is possible to come across the name “Young China” in the youth movements that emerged during this period. The first modern Chinese student movement of the 20th century took place in 1902 under the leadership of the “Young China Revolutionary Army” (Shaonian Zhongguo zhi geming jun), founded by Nanyang College students (Song, 2015: 100). During this period, student demonstrations in 1903 over the postponement of the evacuation of Russian troops from Manchuria are noteworthy. The anti-American boycott launched by Chinese merchants in 1905 was strongly supported by students, and many social groups, from dockworkers to small shopkeepers, supported this boycott. Furth also mentions the existence of many more local anti-imperialist student movements between 1903 and 1908 (Furth, 1973: 60). It should not be overlooked that these movements were the first modern student actions of the “Young Chinese” who fed into May 4.

***The Tiger the most influential political magazine of the Yuan Shikai era. It facilitated the emergence of the “New Culture Movement” by addressing fundamental themes such as the social and cultural norms essential for successful democracies, the relationship between the person and the state, and citizens’ need to cultivate greater self-awareness about political responsibility.***

M. Song says that Liang Qichao used the concept of “Young China” under the influence of the

“La Giovine Italia” (Young Italy) movement founded by Giuseppe Mazzini, who was the pioneer of the movements bearing the adjective “Young.” He also draws attention to many articles published in the New Youth magazine on the “Young Germany” movement and its British, French, and American counterparts. Also, he emphasizes the Young Turk movement<sup>1</sup> as the pioneer of the Young China idea (Song, 2015: 40-44). M. Mesnier also shares thoughts similar to Song’s. He says that Chen Duxiu named his magazine Youth and then New Youth to make it iconoclastic and cosmopolitan, and by writing the name of the magazine as La Jeunesse in the middle of the area that Chinese sentences on the main cover, he established his universal connection with the Young Movements (Mesnier, 1973: 15).

In 1912, when the leader of the Beiyang Army, Yuan Shikai (1859-1916), took power and the second revolutionary attempt to protect the Republic failed, the Chinese Nationalist Party led by Dr. Sun Yat-Sen (1866-1925) was banned and many of its members were forced to flee the country, sparking a new debate in China about the fate of the “Republic.” As opposed to the view of the Chinese Revolutionary Party, which was organized in Japan by the forces left over from the Chinese Nationalist Party, which prioritizes political problems and armed struggle, a division has emerged among those who argue that the main reason for the failure of the “Republic” should be sought in cultural and mental structures. These thinkers argue that a struggle should be waged to transform society. So much so that, against Dr. Sun’s practice that goes as far as taking fingerprints of its members with his view that the main reason for the defeat was the organizational situation, Huang Xing (1874-1916), one of the leaders of the Xinhai Revolution, objected and called for a more in-depth discussion, which was influential among intellectuals (Fenby, 2019: 133;

Weston, 1998: 262).

One of the most essential sources that nourished the "New Culture Movement," *The Tiger* (Jiayin zazhi), was started to be published in Tokyo by Zhang Shizhao (1881-1873) in May 1914 as a product of this process. The support of intellectuals who had not joined the Chinese Revolutionary Party, both in Japan and Shanghai, through their social and economic networks, was important in the publication of the magazine. The "European Affairs Discussion Group" established in Tokyo, the Far East Book Company (Taidong tushuju), where intellectuals came together in Shanghai, and the *Truth Magazine* (Zhengyi zazhi), which started to be published in Shanghai in January 1914, were influential in the publication of *The Tiger* magazine, both in terms of writers and financial support (Weston, 1998: 269).

*The Tiger* was published monthly, with an aver-

age of two hundred pages, between May 1914 and October 1915 (it was not published between November 1914 and May 1915). It was the most influential political magazine of the Yuan Shikai era. It facilitated the emergence of the "New Culture Movement" by addressing fundamental themes such as the social and cultural norms essential for successful democracies, the relationship between the person and the state, and citizens' need to cultivate greater self-awareness about political responsibility. The connection between *Tiger* and the "New Culture Movement" is striking not only at the intellectual level but also in social networks (Weston, 1998: 256). Weston states that there are many names in common between the writers of *The Tiger* and the writers of *New Youth*, and thus, the social networks that formed the New Culture Movement were established before. He emphasizes that many people who played essential roles in the



*The Tiger* (Jiayin) was founded in Tokyo, Japan, in May 1914 (Jiayin year according to the lunar calendar). It was originally a monthly magazine. Its initiator was Hu Hanmin, and its editor-in-chief was Qiu Tong (Zhang Shizhao). Chen Duxiu and Li Dazhao published many articles in the monthly magazine expressing radical revolutionary democratic ideas (Photo: Baidu, 2025).

New Culture Movement, especially Chen Duxiu, Li Dazhao (1889-1927), Gao Yihan (1885-1968), Liu Wendian (1889-1958), Yi Baisha (1886-1921), and Xie Wulia (1884-1964), were writers in *The Tiger* magazine (Weston, 1998: 268). *New Youth*, which was at the center of the New Culture Movement, was published in September 1915. Chen Duxiu decided to publish a new magazine because he thought *The Tiger* was too much of a theoretical publication. He thought publishing a more popular publication that would appeal to the youth was necessary. *The Tiger*, however, could not withstand Yuan's pressure and ceased its activities. Zhang, relieved by Yuan's death in 1916, first reprinted the old issues of *The Tiger*, which attracted enormous interest. Zhang, who started to republish *The Tiger* under the name *Daily Tiger* (Jiayin Rikan) in January 1917, was accompanied by Li Dazhao and Gao Yihan, prominent writers of the *New Youth*, as editors. Chen Duxiu also wrote letters to Wu Yu and Hu Shi asking them to send articles for *Daily Tiger*, which is vital for understanding the continuity of the bond and social relations between the two magazines (Weston, 1998: 278).

**The slogan of the New Youth, whose writers included the distinguished intellectuals of the period; Li Dazhao, Lu Xun (1881-1936), Hu Shih (1891-1962), Liu Bannong (1891-1934), and Yi Baisha, was "science and democracy".**

One of the two centers where the "Young China" idea gained strength before the May 4th Movement was the *New Youth* magazine, and the other was Pe-

king University, which included some of the magazine's directors and writers. Peking University took on a new appearance, with Cai Yuanpei (1868-1940) becoming rector at the beginning of 1917. Zhang's decision to close down his magazine in early 1917 paved the way for the *New Youth* even more. Cai Yuanpei, on the other hand, continued the ongoing connection between *The Tiger* and the *New Youth* by inviting Chen and Zhang to Peking University (Weston, 1998: 279).

Despite the increasing security concerns in China, where central authority and control weakened after Yuan's death, it created a suitable environment for discussing and disseminating ideas. Thus, the social networks at Peking University played an essential role in the formation of "Young China" and "New Culture."

The slogan of the *New Youth*, whose writers included the distinguished intellectuals of the period; Li Dazhao, Lu Xun (1881-1936), Hu Shih (1891-1962), Liu Bannong (1891-1934), and Yi Baisha, was "science and democracy" (Çin Komünist Partisi Tarihi, 2012: 34). The magazine, which had an important place in Chinese political life, adopted the principle of not intervening in political issues and set itself the task of "a mentality revolution that would destroy the old feudal cultural codes" (Grieder, 1970: 176). As with *The Tiger*'s emergence, Hu Shi, Chen Duxiu, and Lu Xun insisted that China's ills stemmed from the failure to purge cultural and mental structures, distinct from students' political initiative (Schwartz, 1973: 7).

These journals and organizations, which were active between 1912 and 1919, provided the intellectual background that led to the emergence of the "May 4 and New Culture Movement" and further developed the concept of "Young China," which began to take its place in both national and international literature during this period (Ishikawa, 2013: 3).



B. Schwartz says, "When we look at the May Fourth Movement from the perspective of the thirty years that preceded it, we see that it no longer resembles a mountain range rising from a flat plain, but a relatively high mountain range in a long section of complex mountainous terrain" (Schwartz, 1973: 2). According to Schwartz, the May Fourth Movement should be seen as a culmination of existing tendencies rather than a qualitatively new beginning (Schwartz, 1973: 10). May 4th and the New Culture Movement brought many young people onto the stage of history as actors. However, the source that nourished this youth, in other words, the efforts of the generation of Chen Duxiu, Lu Xun, and Zhang Sishao, who were defined as the "old youth"<sup>2</sup> as of 1919, both before and during the "New Culture Movement" (Song, 2015: 65). As Mesnier said, for the "Young Men" of 1919,

Chen Duxiu was an "anti-father" father character (Mesnier, 1973: 18).

#### 4 May 4th and the Beginning of the New Culture Movement

Although China maintained its political unity in appearance, in reality, it was fragmented under the leadership of various military cliques, and the years 1915-1927 were characterized as the "Warlord" period. The most powerful person among these warlords during the May 4 and New Culture Movement period was Duan Qirui (1865-1936). Duan, the leader of the Anhui clique of the Beiyuan Army, China's fragmented modern armed force, is remembered for the unequal agreements he made with international powers, especially Japan, while also considering the interests of his clique.



On May 7, 1919, teachers and students of Beijing Normal University warmly welcomed the eight students arrested on May 4 back to school (Photo: Beijing Normal University, 2021).



Due to the Japanese support that Duan needed to suppress the opposition of many important provinces, especially the Manchurians and the Feng-tian Army, he became a target of patriotic students (Fenby, 2019: 141). To fight against Duan Qirui's signing of the Sino-Japanese Military Agreement under the name of Mutual Defense Against Enemies in May 1918, Chinese students studying in Japan decided to organize the "Chinese Youth League," launched campaigns to boycott education, and returned to China to join the fight "against the warlords." After this process, patriotic socialist and nationalist societies were established in universities in China under the names of "Patriotic Student Association" and "Student Association for National Salvation" (Çin Komünist Partisi Tarihi, 2012: 32).

**May 4 at all times is critical in strengthening the idea that class struggle and the struggle for independence are inseparable from each other in the democratic revolution process.**

China, which participated in World War I with the Allied Powers, expected the regions from which it had previously been deprived of its sovereign rights to be returned to it within the framework of the Wilson Principles after the war, and for unequal international agreements to end. The only change was that the regions under German control were given to Japan, the most dangerous power for China. While the Paris Peace Conference (January 18, 1919 - January 21, 1920) was ongoing, a critical process

that shaped China's future was experienced as a result of the events that grew with the great support given to the Chinese youth by the workers, intellectuals, petty bourgeoisie, and national bourgeoisie on May 4, 1919, when the press announced the text of the agreement.

On May 4, over 3,000 students from Peking University and thirteen colleges gathered in Tiananmen Square, chanting "Fight for Sovereignty, Down with the Traitors," "Rescind Japan's Twenty-One Demands," and "Return Qingdao to China". They also demanded the punishment of three pro-Japanese bureaucrats, Cao Rulin (1877-1966), Zhang Zongxiang (1879-1962), and Lu Zongyu (1876-1941), who were northern warlords. As of June 5, workers, shopkeepers, and businesspeople in Shanghai supported the protests, and strikes and demonstrations took place. Then, with strikes and protests spreading throughout the country, the protests initiated by students on May 4 turned into a general patriotic movement. On June 7, the central government released the students arrested in the demonstrations and dismissed three Japanese collaborators. On June 27, Chinese workers and students in Paris surrounded the house where Lu Zengxiang (1871-1949), the head of the Chinese delegation at the Paris Peace Conference, was staying the day before the agreement was signed, and Lu could not afford to attend the signing ceremony (Mitter, 2004: 3-10).

The official historiography of the Communist Party of China emphasizes the common struggle practice of social classes as one of the most important legacies of May 4 (Çin Komünist Partisi Tarihi, 2012: 37). According to B. Schwartz, May 4 included a small group of students and intellectuals. Later, he says that the common struggle practice of social classes in this process, which is frequently emphasized in Marxist literature, is exaggerated and that nationalist feelings ensured irregular and scattered

social participation in big cities. At the same time, its effect was not felt in rural areas (Schwartz, 1973: 1).

Considering the weak ties between the 1911 Xinhai Revolution and the masses, May 4th is essential, even if it was effective only in certain large cities, as it serves as a litmus test for the objective positions of social classes and interest groups in China. In China, where land-owners and bureaucratic groups controlling public resources tend to deal with imperialists for the sake of power, the participation of social forces that can participate in the democratic revolution by establishing a tie between their economic interests and patriotism is quite critical in terms of quality. With the undeniable impact of the October Revolution of 1917, it is pretty problematic to try to downplay the role of May 4 in strengthening the mass ties of the Chinese Nationalist Party during this period. The CPC's claim to the patriotic and nationalist stance of May 4 at all times is critical in strengthening the idea that class struggle and the struggle for independence are inseparable from each other in the democratic revolution process. Even

if it is an exaggeration to claim that May 4 and the New Culture Movement were a series of one event, the figures of the New Culture Movement show that the "Young Chinese" began to rise with May 4. In this process, in addition to the actions and strikes, dozens of institutions such as newspapers, magazines, workshops, student groups, and research institutes were put into operation to find solutions to the problems China was experiencing. As of 1920, there were around four hundred patriotic-nationalist, socialist-anarchist, and communist publications (Çin Komünist Partisi Tarihi, 2012: 37-39).

### **New Culture Movement: The Challenge of the "Young Chinese"**

Mitter states the following about the New Culture Movement: "These activists revolutionized the Chinese language, replaced the old classical form with the vernacular, ended the debate about new political systems, and discarded the social rules regarding traditional relations between men and women.



"The CPC's claim to the patriotic and nationalist stance of May 4 at all times is critical in strengthening the idea that class struggle and the struggle for independence are inseparable from each other in the democratic revolution process" (Photo: Chinese Science Communication, 2025).

This was a movement that involved mainly young and urban patriots. It was therefore associated with the Fourth of May. Yet that day was only one symbol of a much larger change in Chinese society” (Mitter, 2004: 18).

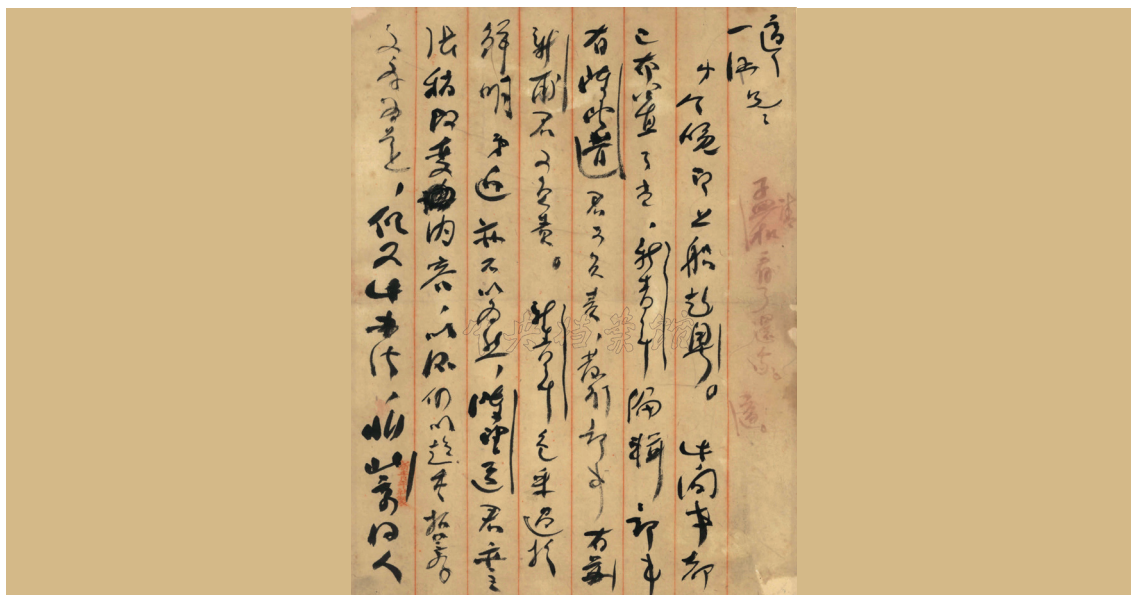
Some of the results of the movement were later criticized by those involved, as discussed below. Nevertheless, Mitter’s words indicate that the “New Culture Movement” achieved its goals to a great extent. Of course, not all the actors involved in the movement had the same intentions. It is impossible to claim that the movement was homogeneous at the level of the actors. The participants made a lively discussion and literary environment possible by representing the broadest range of modernist thought. The common aspect of this process, which is too colorful to be reduced to a single attitude, is the participants’ reckoning with tradition (Schwartz, 1973: 9). This reckoning, as in many countries, began with the introduction of the spoken language of the people as a written language against the “high language,” which was one of the strongest aspects of tradition and allowed traditional authorities to retain a monopoly on knowledge. The pioneer of the language debate in China in 1919 was the famous liberal thinker Hu Shih, considered one of the “old youth.”

Hu Shih, a “Westernized” Chinese, became a brilliant student and intellectual in the United States, where he spent seven years for higher education and doctoral studies, and his reputation spread in academic circles before he even arrived in China. Invited to Peking University by Cai Yuanpei and starting to teach in the philosophy department, Hu Shih was strongly influenced by Liang Qichao and Yan Fu, as well as Herbert Spencer and Social Darwinism in his early youth (Grieder, 1970: 25-30), and in the United States, as a follower of John Dewey, he defended the functionalist pragmatic “philosophy of experimentation” (Chan, 2023: 4). Arguing that the fundamental

issue in China is a change in mentality, Hu advocated the establishment of “supervision and control mechanisms” as the most crucial solution against “bad government” (Fund, 2010: 182). Of course, the operation of these mechanisms primarily depends on a change in mentality.

Hu sparked a significant debate in the country with his article A Proposal for Reform in Literature” in the first issue of *New Youth* in 1917 (Chan, 2023: 5). The main topic of the debate, which Chen Duxio also participated in favor of and further expanded, was the demand for pai-hua, or the mother tongue, to be the national language of China instead of the “dead” wen-yen, or classical language (Goldman, 1973: 85; Snow, 2015: 189). On the other hand, Liang Qichao, who supported the free discussion environment and the May 4th movement, opposed using the daily spoken language as the written language. Still, Du Yaquan (1873-1933) deepened the debate. Du’s essay “On the Native Language,” published in the *Oriental Compendium* magazine at the end of 1919, initiated the polemics between the *New Youth* and *Oriental Compendium* magazines that would continue for a long time (Wang, 2015: 66).<sup>3</sup>

Hu came to the forefront as the representative of “Westernism” in China and soon came under criticism from nationalist and Marxist circles because of his style of writing, which he wanted to bring to a “scientific” form. All modernist nationalist movements reflected the tension between “Westernism” and national culture in their countries with a certain intensity (Mesnier, 1973: 21). Anti-imperialist nationalist and Marxist movements, on the one hand, tried to modernize their countries; on the other hand, they tried to put forward various abstentions against excessive Westernization. Sun Yat-Sen, who was in a much more revolutionary position than Hu, did not neglect to develop ties with traditional Chinese thought (Chen, 2011: 4). Socialists such as Mao



A page from Chen Duxiu's letter to Hu Shih in *New Youth* on the subject of "color." After the May 4th Movement, in September 1919, Li Dazhao edited the "Marxist Special Issue" of *New Youth* and published the article "My View of Marxism" for two consecutive issues. Afterwards, there were differences of opinion between Hu Shi and others who felt that the "red" color of the magazine was too strong (Photo: Xuexi, 2025).

Zedong, Mao Dun, and Lu Xun, on the other hand, tried to create an abstinence with "Chinese" words and expressions that had equivalents in social practice, against the "new stereotypes" created by Hu's "pai-hua" initiative (Goldman, 1973: 90-94).

Mao Zedong, on the other hand, associated the writing style of the CPC, especially that of the Soviet-influenced leaders, with the new stereotypes that developed during the New Culture Movement led by Hu, and emphasized the following in a speech he made in 1942:

During the May 4th Movement, modern-minded people opposed the use of the classical Chinese language and defended the spoken language; opposed traditional dogmas, defended science, and democracy. ... One of the most outstanding achievements of the May 4th Movement was to expose the ugliness of this old stereotyped writing

and old dogma and call on the people to rebel against them. (...) But then foreign stereotypes and foreign dogma emerged. (...) Foreign stereotypes must be eliminated; empty and abstract rhetoric must be ended, and dogmatism must be put aside. They must be replaced by the living and vital Chinese style and spirit that the Chinese people love so much. Only those unaware of the "i" of internationalism can separate the internationalist essence from the national form. On the contrary, we must tightly combine the two" (Mao, 2013: 56-57 and 72).

Du Yaquan attempted to achieve the balance that Mao tried to establish between the Western form and the style and essence of the Chinese people in the New Culture Movement period with the "Theory of Harmony" discussed below.



Still, unlike Mao, he put the “classical form” on the other side of the scale, not the “form of the Chinese people.” Nevertheless, those familiar with Mao’s writings and speeches know that he often referred to classical texts as references, although not formally.

**The most significant result of May 4th is that political movements that do not establish ties with the masses cannot determine China’s future. China has long since passed the stage where it could solve its problems with coups d’état and has entered a revolutionary process. If there is a matter of revolution, the outcome is determined not by experts or intellectuals but by the tendency of the masses.**

The debate that Hu initiated over “language” was not only addressed as a mentality and culture issue by the young masses who became politicized during the May 4 protests, but it also evolved into a political power debate. Although the New Youth magazine wanted to draw a clear line between itself and politics, the young masses whose mentalities they tried to change dragged them along and politicized them. In the great demonstrations on May 4 and the following days, the young people, armed with “new ideas,” called for the renewal of political institutions and spent the year of 1919 actively with many new orga-

nizations. Hu was pleased that the demand for change that would transform China’s modernization and social structure came from outside the political establishment. Hu saw politics solely through the eyes of politicians and other political elites within the institutional world. In fact, in one of his articles, he said, “Young China, with its reawakened hope and energy, is now slowly but steadily working for Chinese democracy in these new channels of activity” (Hu, 1919: 350, as cited in Grieder, 1970: 178). However, he did not want to see the politicization of the mass movement and the evolution of the nature of politics from state- and elite-centered to mass- and party-centered. For this reason, he saw “politicization” as entering into the rules of Duan and other warlords and becoming corrupt. He argued that intellectual and cultural transformation would have more profound consequences than political struggle. Thus, he argued that creating a democratic society would be an intellectual success, not a political success. This idea undoubtedly contains an elitism that can be seen as “the reformation of society by the intellectual” (Grieder, 1970: 179). Liberalism’s anxiety for the democratization process manifests in the masses’ politicization. When democracy is established as the participation of the people in decision-making processes rather than political elitism, liberals reject any initiative that the masses believe could limit the freedom of the individual, especially via demand for equality, and that they would suppress this freedom with majority decisions. Dr. Hu’s liberal ideas also greatly influence his political elitism.

J. Grieder (1973) emphasizes that the politicization of problems by the youth in the New Culture Movement was the irreversible defeat of the evolutionary logic of liberalism in China.



The discussion that started between Hu and Li Dazhao in the summer of 1919 on “problems and isms” and Chen Duxiu’s stance on this issue being in favor of Li brought the relationship between the masses and politics to the agenda of Chinese intellectuals (Grieder, 1973: 96). Although the intellectual line that distanced itself from politics started with Kaplan and was continued in the first period of the New Youth, the New Youth after May 4 heralded the new era of the “revolutionary intellectual” who did not neglect the political struggle and especially the guidance of Marxism regarding China’s problems.

Ultimately, Dr. Hu’s hopes of “not becoming politicized,” the movement that he thought would be limited to transforming students’ intellectual activities, ways of thinking, and lifestyles, resulted in the masses, especially the youth, establishing ties with the Guomindang and giving birth

to the CPC from within the movement. The most significant result of May 4th is that political movements that do not establish ties with the masses cannot determine China’s future. China has long since passed the stage where it could solve its problems with coups d’état and has entered a revolutionary process. If there is a matter of revolution, the outcome is determined not by experts or intellectuals but by the tendency of the masses. Thus, the May 4th Movement taught the New Culture Movement, which revealed the source of the negative situation in China as a matter of mentality, that mentality is transformed in the struggle practice of the masses. Of course, the mental world of societies can also be transformed by the state’s ideological apparatus and socializing tools. However, let’s consider that the cliques that hold political power in China are the feudal power elements that emerged in the late Qing period.



“Apart from New Youth, essential publications such as *Weekly Review*, *The Morning Post*, and *Beijing News*, and the thought workshops led by anarchists in universities were also among the centers of current discussions” (Photo: Peking University, n.d.).

It should be determined that the problem of political power that will use these tools and instruments is more pressing, and in the absence of this, the masses can only be transformed through political practice. In addition, creating the ground that will enable the masses to participate in the political process, or seeing them as passive, and teaching crowds and attaching appropriate identity labels to them, is also a matter of political choice. These two lines were important in China's political decisions after 1949.

**In late 1922, Albert Einstein also visited China. In early 1923, Nobel Prize-winning Indian poet Rabindranath Tagore organized a series of conferences in China to present his views on constructing rural communities based on the principles of aesthetics, non-violence, self-sufficiency, and collective work.**

In this period, apart from *New Youth*, essential publications such as *Weekly Review*, *The Morning Post*, and *Beijing News*, and the thought workshops led by anarchists in universities were also among the centers of current discussions (Çin Komünist Partisi Tarihi, 2012: 34). In addition, the names of the magazines that were active in this period, such as *The Dawn*, *Young China*, *New Society*, *People's Tocsin*, *The New Woman*, *Plain People*, *Upward*, and *Strife*, are striking in terms of understanding the spirit of the period (Spence, 1990: 312). According to Arif Dirlik, around 1919, during the May Fourth period, anarchism pervaded radical thought on

social and cultural change, and "communism" was identified with "anarcho-communism." According to Dirlik, "Marxism was not only one of the competing socialisms of the May Fourth period, it was also the weakest, both in terms of the number of people devoted to it and the familiarity of Chinese intellectuals with it, and Leninism was almost non-existent as an ideology" (Dirlik, 1989: 10).

On July 25, 1919, the Deputy Foreign Commissioner of Soviet Russia, Lev Karakhan (1889-1937), published an official text, later known as the "First Karakhan Manifesto," the full name of which was "Declaration to the Chinese People and the Northern and Southern Governments of China". According to the manifesto, Soviet Russia demonstrated its will to redress all injustices against China during the Tsarist period. It declared the invalidity of all agreements made during this period regarding economic and political sovereignty against China. The most important article in the manifesto was about the return of the Chinese Eastern Railway (a section of the Old Siberian Railway) to China without compensation. Soviet Russia later stated that there was no question of a "free transfer" and a misunderstanding due to a faulty translation from the French of the Manifesto (Spence, 1990: 307). Although this issue later caused friction between Stalin and Mao, it was hailed as an unprecedentedly praiseworthy statement under the day's circumstances. This statement from Soviet Russia during the most significant patriotic movement in Chinese history caused the anarchist-socialist youth in the country to take a great interest in Marxism-Leninism and the Bolshevik Revolution (Etö, 1986: 108). In response to this manifesto, a "Russian Studies" column was placed in the *Yeni Gençlik* magazine, creating an excellent opportunity for Bolshevism to spread in China (Ishikawa, 2013: 60). This interest led to an effort to compare Russia and China's situations and



Shanghai youth on parade (Photo: Peking University, n.d.).

seek a solution to China's problems. Russia, with its large population, a very backward economic infrastructure, and cultural environment, was compared to China, with its rotten political structure under the Tsar's rule. China, which has a border of thousands of kilometers with Russia, was seen as one of the countries that needed to be dealt with first by the Comintern. Thus, all conditions became suitable for the rise and organization of the communist movement in China (Çin Komünist Partisi Tarihi, 2012: 35-36). Indeed, Dirlik emphasizes that Chinese anarchists and non-Marxist-Leninist socialists transformed the May 4 movement under the influence of the October Revolution, adopted Bolshevik ideology, and became Chinese communists (Dirlik, 1989: 5). Indeed, within a few years, the anarchist movement in China rapidly lost its influence, and the youth in this movement turned to the CPC. While older anarchists sharpened their ideas that rejected class struggle and, after the CPC was founded, became members of the Goumindang's

most anti-communist right wing (Modern China, 1998: 185-187).

Among Chinese socialists, Jiang Kanghu (1883-1954), Zhang Dongsun (1886-1973), and Zhang Junmai (Carson Chang) (1887-1969) continued to be important figures of Chinese socialists during this period and afterwards and attracted attention with their necessary theoretical expansions, albeit eclectic. Influenced by Bertrand Russell's guild socialism, these people saw capitalism as a "necessary evil" for transitioning to socialism. However, it had certain benefits (employment, technology, etc.), and argued that the bourgeoisie in the country should be supported for this purpose. They were also strongly influenced by Kant and saw the sense of "responsibility" as the most critical part of legality. Zhang Junmai, referring to the Japanese "bushido" tradition, and Zhang Dongsun, referring to Buddhism, tried to localize the theories of these thinkers by establishing a connection between Kant and Russell (Fund, 2010: 202-205; Zhao, 2023: 233).



It should also be noted that Bertrand Russell and John Dewey, who greatly influenced Chinese intellectuals, visited China during the May 4th Movement. Russell, who spent 1920-1921 in China, visited many Chinese cities, including Changsha in the interior of Hunan Province, gave lectures, and met with intellectuals and students. John Dewey, who was friends with Hu Shih, lived in Beijing between 1919 and 1920. Like Russell, he also actively met with Chinese intellectuals and students through conferences, courses, and study groups. In late 1922, Albert Einstein also visited China. In early 1923, Nobel Prize-winning Indian poet Rabindranath Tagore organized a series of conferences in China to present his views on constructing rural communities based on the principles of aesthetics, non-violence, self-sufficiency, and collective work. Apart from these names, many foreign activists and scientists came to China during the May 4 period. These visits are remarkable examples of understanding the dimensions of May 4 (Spence, 1990: 317).

### **“Enlightenment” versus “enlightenment”: The Reformists’ Reaction**

During the May 4th movement, fundamentally an Enlightenment initiative advocating for science and reason against traditional values, some intellectuals actively contradicted Western values by drawing on Chinese traditions. As a result of the damage caused by World War I to the belief in liberal thought and values and the reaction caused by the easy disregard of the Wilson Principles when it came to the interests of the great powers, a different “enlightenment” practice came to the fore. Moreover, China is not the only regional example in this regard.

The March 1st Movement in Korea revived patriotic, libertarian, and socialist ideas on a similar basis, and ideas that criticized the West while benefiting from Western thought and their tradition were expressed (Ishikawa, 2013: 31). In fact, Wang Hui also sees the defenses of the nationalist and

constitutional reformist Liang Qichao (1873-1929), who questioned the West in terms of “civilization” and returned to Confucian values in the face of the de-struction caused by the World War, as part of the practice of “enlightenment” (Wang, 2015: 55).

In a climate where Chinese modernists accused Western imperialism of turning its back on the legacy of the Enlightenment and the French Revolution, it was impossible for Liang and his circle not to be influenced by the spirit of the period. Liang and the famous reformist thinker Yan Fu’s (1854-1921) critiques of “Enlightenment and modernization,” drawing on Neo-Confucian ideas as well as Friedrich Nietzsche, Henri Bergson, Rudolph Eucken, Hans Driesch, and Bertrand Russell, can be evaluated within the scope of “counter-modern critiques of modernization” or “modernism theories of counter-modernization” (Fund, 2010: 22). However, unlike purist reactionaries, Liang and Yan criticized Western experience by appealing to thinkers who emerged from the West along with Confucianism. However, purist reactionaries have no reason to appeal to the West in this context; they are uncomplicatedly attached to what they have always been, namely “Old Chineseness.” The most significant difference between Liang and Yan and those who participated in the May 4th Movement is that, while Liang and Yan proposed Confucianism to all humanity as a diet to get rid of Western civilization’s detrimental effect, the “progressives,” in the face of the destruction caused by the capitalist world system in China, embraced the ideologies taken from Western political thought and the science they thought was on the side of the workers. Indeed, Wang Hui also emphasizes that “the New Culture Movement launched a full-scale attack against Kang Youwei (1858-1927) and his supporters, who raised the banners of ‘science’ and ‘democracy’ and wanted a return to the monarchy,” and that among the warlords, there was a great challenge to those who were trying to rebuild the monarchy, and therefore the old political system and its ideological-cultural

world, especially those who were thinking of en-throning the last Qing Emperor Pu-Yi (Wang, 2015: 55). Du Yaquan, from Liang's circle, who tried to find a middle ground between reformists and modernists, attempted to establish a balance between Western and Eastern thought with the "theory of harmony" (Tiaohe Lun).

Seeing science and morality as equal values, Du says that science improves material life, while morality ensures the continuation of spiritual life. In this context, Du argues that Herbert Spencer, whose ideas he was influenced by, such as Liang and Yan, point to the importance of social cooperation and mutual aid for the progress of humanity, and claims that morality does not contradict the "survival of the fittest." Evaluating political developments in Europe from the perspective of the "theory of harmony," Du argues that a single ideology cannot encompass everything and that different ideologies exist for the benefit of each other; that rival ideologies always share common ground, and therefore the differences between them do not exclude the possibility of synthesis; that ideologies, which are products of the human mind, cannot have natural boundaries; and that thinking people must communicate with others. He emphasizes that conflicts of ideas are normal. Still, that progress is achieved by resolving these conflicts, and people should therefore be open-minded and not deny other views without going to extremes. Du, who advocates harmony as the engine of progress, integrates "harmony" with the moral understanding inherited from Confucianism (Fund, 2010: 88).

### **"Romantics of Young China" in the Literary Front of New Culture**

Mingwei Song emphasizes that the young characters in the novels of the period shine through the magnificent and sublime image of "Young China," a central symbolic sign in modern Chinese nationalist discourse and expressing the constant yearning

for national re-juvenation (Song, 2015: 8). This image is particularly reflected through the characters created by Lu Xun, Ye Shengtao, and Mao Dun. Chinese literature of the period is a subject of study in terms of understanding the "Young Chinese."

Another literary group that attracted attention during this period was the representatives of Chinese romanticism. Romantics, who emerged as a philosophical thought discussing the relationship between the part and the whole during the Napoleonic Wars in Europe, wove the political-cultural world of nationalism with their extremely passionate style of expression, preferring emotions over reason, culture over the universal, and the community over the individual.<sup>4</sup> Starting with the Sturm und Drang movement, the influence of Romantic nationalists on Young Movements and nationalist organizations in Europe is well known. As discussed above, in China, all modernist political forces had to defend the values of the "Enlightenment" under the banner of their struggle against tradition. Their nationalist and Enlightenment attitudes can also be observed as a tension experienced by all non-European modernist nationalists. When it came to taking a political stance, nationalists couldn't make a political-cultural opening that glorified the rural and country values to erase all the remnants of the traditional historical power bloc. Later, after long struggles, Mao Zedong paved the way for romanticizing these values through the "spirit of the Chinese people." This influence can also be seen in Mao's poems. Since Mao Zedong made this view dominant in the 1940s, it can be estimated that it was difficult for Chinese romantics to show up in politics in 1919. For this reason, Leo Ou-fan Lee emphasizes the existence of Chinese romantics who tried to stay out of politics during this period. He even says that the debate in the Ottoman Empire about "should art be made for art's sake or society?" became a subject of discussion between the literary canon represented by Lu Xun in China and the romantics (Yeh, 2017: 295; Leo, 1973: 72).



## Conclusion

Following the patriotic demonstrations that began on May 4, 1919, the political elites that would leave their mark on China's future rose to prominence, the political importance of the mass line was understood, all monarchist tendencies were eliminated, gender equality became one of the fundamental issues of Chinese politics, and the New Culture Movement, which had a significant impact on the establishment of the Communist Party of China, is one of the milestones in the creation of "Young China."

The Chinese Nationalist Party (Guomintang), which gained strength as a result of this movement, met with the masses, gained the support of Soviet Russia, and paved the way for the reunification of China, in alliance with the CPC. The young people of this period, who found a place for themselves in the Guomintang and the CPC, whose paths diverged as of 1927, became decisive in the future of China both with these parties and in the organizations that formed alliances with them.

Although the 1911 Xinhai Revolution ensured the declaration of the republic, it could not eliminate the political elites within the traditional power bloc. After a while, China entered the most turbulent period in its history. It can be said that this turbulent process continued in various stages until the 1949 Chinese Revolution. The "Young Chinese", who determined the future of China with the May 4 and New Culture Movement, carried out the cultural transformation and new political forms that would complete the deficiencies of 1911 and bring China back to its feet with great defiance during this period, thus constructing China's most important revolutionary process.

Although "Young China and Young Chinese" do not have a place in Chinese political memory as much as "Young Turks" as a concept, "youth" has been one of the most critical issues and subjects of modern Chinese politics. In the establishment of the CPC, when Mao assumed the leadership in the CPC during the Cultural Revolution on June 4, 1986, and 1989, "youth" was one of the most essential elements of Chinese politics. In its

becoming such an active subject in Chinese history, the influence of May 4 and the New Culture Movement cannot be denied in terms of the revolution in mentality, the understanding of the importance of the mass line in politics, and the emergence of organizational structures on the stage of history. 

## Notes

<sup>1</sup> Mao Zedong described Deng Xiaoping and Chen Yun, who were elected as members of the Standing Committee of the CPC Central Committee in 1956, as the "Young Turk Group" because they were younger than the other members (Hu, 2016: 36). It is known that Chinese reformists and nationalists, namely Kang Yuwei, were interested in the Young Turk Movement, which was a current event in their time. However, the fact that this name was used within the CPC even in 1956 is important in terms of the recognition and influence of the Young Turk name.

<sup>2</sup> This concept was first used as a pen name by Wu Jianren in his work *The New Story of the Stone: Old Youth, Chinese*, Lao Shaonian" 老少年 (Song, 2015: 65).

<sup>3</sup> Çinde bu dönemde "yazı dili - günlük dil" üzerine yapılan tartışma, Osmanlı İmparatorluğu'nda Tanzimat Dönemi'nde İbrahim Şinasi'nin başlattığı ve Osmanlı aydınlarını ikiye bölen tartışma sürecine çok benzemektedir. Çin'in bu tartışmayı Osmanlı İmparatorluğu'na nazaran bu kadar geç yapmasında, 1905'e kadar "sekiz ayaklı klasik sınav sistemi"nin temelde klasik Çin dili ve edebiyatını bilmeye dayanması önemli rol oynamıştır. Aynı zamanda siyasetin sadece klasik dili bilen elit kesimler içinde tartışılan bir konu olması; ülkenin kurtuluşunun ekonomik ve kurumsal dönüşümlerle sağlanmasını savunan düşüncelerin hâkim olduğu bir dönemin ardından, 1911 Xinhai Devrimi'nin istenilen sonuçlara ulaşamaması üzerine, Çin aydınları bu kez zihniyet meselesini gündeme getirmişlerdir.

<sup>4</sup> Today, thousands of sources revealing the relationship between romanticism and nationalism have been compiled in the *Encyclopedia of Romantic Nationalism in Europe* (<https://ernie.uva.nl/viewer.p/21>).

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# WAPE 18th Annual Forum

## 85 political economists from 16 countries discussed multipolarity in Istanbul

**The World Association for Political Economy (WAPE) Annual Forum, organized by the China Business Development and Friendship Association (Turk-China Business Association) at Yeditepe University on August 6-8, 2025, was attended by 85 political economists from 16 countries, and 68 papers were presented. The theme of this year's Forum was the challenges and opportunities that multipolarity brings to political economy. Topics such as artificial intelligence, ecology, the digital Silk Road, global economic transformation, socialist modernization in China, and regional alliances were discussed from a political economy perspective based on current data. Please find attached Prof. Cheng Enfu's and Adnan Akfırat's speeches at the opening session and the final declaration of the WAPE 18th Forum.**

THE 18TH ANNUAL FORUM OF THE WORLD Association for Political Economy (WAPE), organized for the first time in Turkey, was successfully completed after three days of sessions. Academics and experts from 16 countries evaluated the course of the world on the axis of multipolarity. Papers were presented in concurrent sessions, and a lively exchange of views took place with questions and contributions from participants.

On August 6, WAPE concluded with a meeting of Council members, which takes place at least once a year. Award recipients were selected, and it was decided that the 19th Forum would be held in London, the 20th in Palermo, and the 21st in Moscow in the hope of ending the war. Three new academics from Turkey were accepted to join the WAPE Council. Prof. Dr. Erınç Yeldan, Prof. Dr. Melih Bař, and Assoc. Prof. Dr. Deniz Tansi were elected as WAPE Council members.

The Forum started on the afternoon of August 6 with the opening session chaired by Prof. Xiaoqin

Ding, Secretary General of WAPE. Yeditepe University Vice Rector Prof. Dr. İpek Karaaslan, WAPE President Prof. Cheng Enfu, and Turkish-Chinese Business Development and Friendship Association President Adnan Akfırat delivered the opening speeches. Following the speeches, the "Marxian Economics Award" and "the Distinguished Achievement Award in Political Economy for the 21st Century" were presented to the winners.

### LIFETIME CONTRIBUTION AWARD TO KORKUT BORATAV

Veteran Turkish economist Prof. Dr. Korkut Boratav was among the academics who received the "Marxian Economics Award." In the same category, Prof. Dr. Jian Xinhua from Wuhan University in China, Prof. Dr. Radhika Desai from the University of Manitoba in Canada, and Prof. Dr. He Ganqiang from Nanjing University of Finance and Economics in China were also awarded.





On August 6, WAPE convened its Council members meeting, occurring at least annually (Photo: BRIQ, 2025).

The “Distinguished Achievement Award in Political Economy for the 21st Century” was presented to Alberto Lombardo from the University of Palermo, Italy; Prof. Dr. Özgür Orhan-gazi and Prof. Dr. Erinç Yeldan from Kadir Has University; Prof. Dr. Li Zhengtu from Shanghai International Studies University, China; Prof. Dr. Stavros Mavroudeas and Assoc. Prof. Dr. Costas Passas from Panteion University, Greece; Assoc. Prof. Dr. Costas Passas from Panteion University in Greece, Assoc. Prof. Dr. Sabah Alnasseri from York University in Canada, Prof. Dr. Liu Runqiu from Sichuan University in China, Prof. Dr. Andrii Grytsenko from National Academy of Sciences in Ukraine, Assoc. Prof. Dr. Sousuke Morimoto from Rikkyo University in Japan, Prof. Dr. Vincent James Hooper from SP Jain School of Global

Management in Australia and Assoc. Prof. Dr. Li Linan from Xiamen Institute of Technology in China.

After the traditional sapling planting ceremony as part of the forum, a group photo was taken in front of the rectorate.

Founded in 2006 and based in Paris, the World Association for Political Economy (WAPE) is an international academic society. The president of the WAPE is Prof. Dr. Cheng Enfu from the Chinese Academy of Social Sciences. The annual forums, which have been organized in cities such as Beijing, Berlin, Johannesburg, Hanoi, Moscow, Shanghai, Fuzhou, and Athens, were hosted for the first time in Turkey this year by Yeditepe University in cooperation with the China Business Development and Friendship Association.



## The Opening Speech of the 18th Annual Forum of the WAPE

**Prof. Dr. Cheng Enfu**

Chair of WAPE, Academician of the Chinese Academy of Social Sciences  
Dean of the Marxism Research Institute of Shanghai University of Finance and Economics

Dear Prof. Mehmet Durman and Mr. Adnan Akfirat,

Dear WAPE members, experts, and scholars,

We are very glad to gather in beautiful Istanbul, Turkey, to have the 18th Annual Forum of the World Association for Political Economy themed “Multipolarity in the 21st Century: Challenges and Opportunities in Political Economy” and grant the “Marxian Economics Award” and “the Distinguished Achievement Award in Political Economy for the 21st Century” for the year of 2025. First of all, on behalf of the WAPE, I sincerely thank the leaders and conference staff of Yeditepe University and the Turkish-Chinese Business Development and Friendship Association for your strong support and meticulous preparation, and I warmly welcome experts and scholars from all over the world!

This forum will discuss in depth of the law of unbalanced development of the world economy and the new pattern of international economic development; the rise of emerging economies and their impact on the world power structure; the development of “the Belt and Road” international cooperation, the BRICS and the SCO; the challenge of US dollar hegemony and its alternative monetary scheme and the establishment of a new international economic order; the role of regional alliances and the reshaping of a multi-level governance system; ecological challenges and resource policies in a multi-level world pattern; the evolution of labor relations and production systems at this stage; the

geopolitical political economy of technology and digital governance; the historical logic and theoretical logic of the multi-polar process; new developments in left-wing international political economy theory; challenges and countermeasures faced by the democratization, wealth distribution and people’s participation in governance of countries in the Global South; artificial intelligence and exploitation of surplus value; the issue of class change in the world and countries under the digital background; the ineffectiveness of neoliberalism and neo Keynesianism; the theories, policies, and models of modern Marxist political economy, and among many other important topics.

Comrades and friends, I believe there are several important theoretical and practical issues worth pondering.

First, how should we assess the current global economic landscape? The present international economic environment is characterized by complexity and severity. Influenced by the convergence of multiple crises—including contractionary monetary policies and elevated real interest rates in major economies such as the United States, Europe, and Japan, persistently high energy prices, sluggish growth in real household incomes, and declining confidence—the global economy faces intertwined short-term challenges and long-term structural contradictions. Consequently, downward pressure on economic growth continues to intensify, with recession risks progressively escalating. The bleak economic outlook has led to divergent national interests among different types of countries, with competitive-cooperative relations among major global powers or blocs undergoing profound realignment. In some cases, zero-sum games between major powers have even escalated into “negative-sum games.” The intricate contradictions of contemporary capitalism have rendered the global economy increasingly characterized by imbalances, disharmony, instability, and multifaceted crises. Trade wars and currency conflicts persist



Prof. Dr. Cheng Enfu, President of WAPE, delivers the opening speech  
(Photo: BRIQ, 2025).

among developed nations as well as between developed and developing countries, with repercussions reverberating globally. The hegemonic practices of protectionist powers, led by the United States, manifest as acts of dominance, bullying, and coercive diplomacy. By politicizing, instrumentalizing, and weaponizing economic, trade, and technological issues, these actions represent a distorted form of trade protectionism and constitute contemporary manifestations of neo-imperialism and neo-colonialism. Such conduct is inevitably inflicting severe damage upon the development of the world economy. This has inevitably provoked countermeasures from other nations, exacerbating global conflicts, frictions, and confrontations, thereby adversely impacting the development of the world economy and the livelihoods of people across nations. Only through collective solidarity

and active opposition to all forms of hegemonic practices can the global economic landscape progressively improve.

Second, how should we perceive the current new landscape of the global economy? Since the financial and economic crisis that erupted in the United States and the West in 2008, and the Russia-Ukraine conflict and Middle East conflicts triggered by the U.S. and the West in 2022, the global economic landscape has increasingly shifted toward an “East rising, West declining” trend. Specifically, the economic significance and share of global GDP contributed by the U.S.-led Western economies, represented by the G7, have declined. Conversely, the economic importance and GDP contributions of Eastern and Southern nations, represented by China, Russia, and other BRICS countries, have risen.

On April 9, 2023, data released by the UK-based macroeconomic research firm Acorn Macro Consulting revealed that, based on purchasing power parity (PPP), the BRICS bloc—comprising five major emerging economies—has surpassed the Group of Seven (G7) in its share of global GDP. Specifically, the BRICS nations accounted for 31.5% of global GDP, while the G7 contributed 30.7%. Notably, the expanded BRICS coalition in recent years has demonstrated an even greater economic footprint and heightened contribution to global output.

The emerging international economic landscape characterized by “the East rising and the West declining” is fundamentally shaped by the internal and external contradictions of the United States, as well as the mechanisms and patterns of hegemonic decline. This transformation also stems from the proactive efforts of Global South nations, which—based on their domestic realities—actively engage in global development cooperation, expand development pathways, and uphold self-reliance and independent development.

On November 10, 2022, during the 21st session of the United Nations, Pakistan, acting on behalf of the Group of 77 member states and China, introduced a draft resolution entitled “Towards a New International Economic Order.” Subsequently, on November 21, 2022, the United Nations adopted this resolution at its 22nd session. This landmark resolution represents a significant step toward establishing a just multipolar world order and fostering a new paradigm in international economic relations.

Third, how should we evaluate the scientific validity and practical applicability of various neoliberal and Keynesian economic theories? Since the late 1970s, neoliberal economics has risen to prominence and gradually become the dominant paradigm in global economic thought. However, the implementation of neoliberal theories and policies has yielded economic outcomes—both nationally and globally—that fall short of the performance achieved during the Keynesian era. Instead, these policies have

exacerbated regional disparities, widened international inequalities, intensified class contradictions, and aggravated debt crises. Ultimately, their inherent vulnerabilities and failures have been exposed through successive financial crises, economic downturns, fiscal crises, and social welfare crises. Even during the era of technological supremacy, lucrative arms trade, and economic dominance, the United States remains unable to escape the “compound crisis”—an intricate interplay of economic downturns, social unrest, and political instability triggered by financial crises.

Both traditional and contemporary Keynesian economics demonstrate a degree of objectivity and progressiveness in theory and policy compared to classical and neoliberal approaches. However, these two dominant schools of economic thought fundamentally fail to address the practical challenges faced by national and global economic development. Marx and Engels profoundly elucidated the fundamental contradiction of capitalism—namely, “the contradiction between the socialization of production and the private ownership of the means of production under capitalism.” They further identified this foundational contradiction and its derivative conflicts as the root cause of various societal crises and contradictions inherent to capitalist systems. Neoliberalism, along with both traditional and contemporary Keynesianism, fails to resolve the inherent contradictions between socialized, globalized, and intelligent large-scale production under capitalism and its foundation in private ownership of production means, particularly private monopoly ownership. The dominance of private monopoly ownership, coupled with its resistance to national and international regulatory mechanisms, constitutes the root cause of severe contradictions and systemic crises observed across nations and globally. These manifest in domains including but not limited to technological development, ecological sustainability, investment patterns, production systems, exchange relations, distribution mechanisms, consumption models, and public welfare.

Fourth, how should we evaluate the scientific validity and practical applicability of Marxist economics and its contemporary theories of upholding fundamental principles while breaking new ground? The Marxist-Leninist economic system, guided by scientific methodology, has evolved through critical reflection on capitalism and imperialism coupled with scholarly innovation. Its core paradigms and fundamental conclusions withstand rigorous logical scrutiny and empirical verification. The emerging phenomena and distinctive characteristics observed in the economic development of contemporary socialism and capitalism have garnered extensive attention and research within global academic circles. Numerous economists, both domestic and international, continue to employ Marx's scientific methodology and penetrating insights to transcend the narrow approaches and theoretical frameworks of modern mainstream Western economics. They actively explore the intrinsic mechanisms and laws governing modern economic development, yielding a wealth of original and innovative research outcomes. Under my leadership, the international innovative Marxist academic team adheres to Marxist-Leninist political economy as its foundation while incorporating scientific elements from both global Marxist scholars and modern Western economic theories. Our fundamental objective is to construct a new paradigm that surpasses not only classical Marxist-Leninist economic theory and Soviet economic models but also modern mainstream Western economic theories. This paradigm aims to establish an economic framework reflective of the global economic landscape—essentially, a Marxist-oriented “postmodern economics” and an internationally innovative Marxist school. For detailed theoretical constructs, policy implications, and methodological approaches of this school, readers may refer to our multilingual publications. As an open academic community, we welcome scholars worldwide to engage in collaborative research and intellectual exchange.

Fifth, how can we adopt more academically competitive strategies in a multipolar world and a diverse economic theoretical landscape? I contend that to foster sustainable global economic and social development while addressing the opportunities and challenges in the political-economic sphere of this multipolar era, we must advocate for increased and more effective collaborative actions and collective advocacy among Marxist economists worldwide. Individual or small-group efforts by scholars from various countries cannot fundamentally alter the current dominance of mainstream bourgeois economics. Our association and the distinguished experts present here should embrace this historic responsibility and mission by strengthening multilateral alliances among Marxist and left-wing economists across nations. Through progressive consolidation, we must build a robust theoretical front, continuously innovating while upholding foundational principles to advance modern Marxist economics—thereby enhancing its international academic influence and securing greater discursive power in global theoretical and policy debates.

From a broader global and theoretical perspective, Marxist and left-wing academic societies, media platforms, forums, and educational institutions worldwide should unite to enhance mutual exchanges on leftist theories, strategies, and tactics. By seeking common ground while reserving differences, minimizing unnecessary debates, and jointly advancing theoretical innovations in modern Marxist economics, these efforts should translate into practical applications. Together, they must counteract the adverse influence of mainstream bourgeois theories and policies promoted by monopoly capital, striving collaboratively to foster global peace, development, justice, security, and social welfare.

Finally, I wish the annual conference a complete success, and may everyone enjoy fruitful exchanges and maintain good health!



## Opening Remarks at the 18th WAPE Forum

Adnan Akfırat

Chairman of the Turkish–Chinese Business  
Development and Friendship Association  
Vice Chair of the World Association for Political  
Economy

Distinguished participants, dear colleagues,  
İstanbul'a hoş geldiniz!

Welcome to Istanbul, welcome to Türkiye, not only a land connecting two continents but also a leading country in West Asia and one of the foremost pioneers in the global struggle for a multipolar world.

Today, the most pressing reality we face is that the world is no longer unipolar. Understanding and analyzing political, economic, social, and cultural developments these days requires us to recognize the dynamics of multipolarity.

But the establishment of a multipolar world is not an automatic or spontaneous process. It is built on extraordinary efforts, creative labor, sacrifice, and even bloodshed. This hopeful and transformative development is the result of relentless human endeavor.

Economically, one of the most decisive factors in breaking imperialist hegemony has been China's remarkable development, made possible through socialism. China's productive power, which now reaches across the globe, has transformed the Asia-Pacific into a new epicenter of commodity production and trade. This grand awakening in Asia has created a favorable climate for the development of national economies across West Asia, Central Asia, Africa, and Latin America.

On the geopolitical front, the armed resistance of the peoples of West Asia has forced a shift in U.S. imperialist strategy. President Trump's commitment to ending wars was not merely political rhetoric—it was born out of geopolitical necessity.

Terrorism rooted in ethnic and religious separatism, which has plagued developing nations for the past half-century, is steadily losing relevance in this new multipolar order. The decision of the PKK—one of the world's largest terrorist organizations—to lay down its arms and integrate with the Turkish nation and state is a direct victory for multipolarity. In Syria, the so-called SDF forces are also moving toward integration with the Syrian government and state. We now see the conditions emerging for the resolution of such conflicts in countries ranging from Ukraine, Pakistan, Iran, Myanmar, and Kashmir to the Philippines, Sudan, Nigeria, Ethiopia, Colombia, and even China.

Dear friends,

To further develop this new multipolar world, two critical tools are required: innovation and unity.

Innovative thinking—creating new paths when none seem available—is essential in launching a new era. As our ancestors demonstrated when Sultan Mehmet the Conqueror transported his ships over land during the siege of Constantinople, bold initiative shapes history. We have a saying in Turkish: *“The horse belongs to the rider; the sword belongs to the bearer.”*

In times of great transformation, what matters is not quantity but quality. The small becomes mighty, the weak grow strong, and ideas once confined become the spiritual fuel of millions.

The second key lies in unity. Even as U.S. imperialism wanes, it remains the world's most powerful military force, and the dollar continues to dominate global finance. To confront such an immense force, our greatest weapon will be solidarity—that amounts to political, military, economic, technological, cultural, and social cooperation.

Establishing an international union that responds to the needs of a multipolar world and determining which powers will take the initiative is an urgent agenda item. I believe that political economists play a significant role in shaping this initiative.



WAPE Vice President and BRIQ Chairman Adnan Akfırat delivers the opening speech  
(Photo: BRIQ, 2025).

Dear friends,

This year, the WAPE Forum is being held for the first time in a West Asian country, and we are honored that it is in Türkiye. I would like to extend my deepest gratitude to Mr. Bedrettin Dalan, the Chairman of the Board of Trustees at Yeditepe University and my dear elder brother, for his generous support in hosting this important event.

I would also like to express my appreciation to WAPE President Prof. Cheng Enfu and Secretary General Prof. Allen Ding for their bold decision to bring the 18th Forum to Türkiye.

I want to offer heartfelt thanks and praise to Associate Professor Deniz Tansi, who represented Yeditepe University on the WAPE 18 Forum Organizing Committee and worked tirelessly to ensure its success.

The 18th WAPE Forum is indeed a historic gathering—in terms of both its participants and its content. We have designed a space where the challenges and possibilities of multipolarity are discussed through a broad range of perspectives and rich

intellectual diversity. We are embracing the great revolutionary teacher Mao Zedong's principle: "Let a hundred flowers bloom; let a hundred schools of thought contend." We aim to learn from one another and build common ground for all humanity.

Over the past three months of preparations for this forum, I was unfortunately incapacitated by a severe case of vertigo. I have only been able to appear here today out of necessity. During this period, the responsibility of organizing this major event was shouldered—and fulfilled brilliantly—by a young and dynamic secretariat team under the leadership of Mr. Süheyl Baybalı, Secretary General of the Turkish-Chinese Business Development and Friendship Association. On behalf of WAPE, I extend my sincere thanks to them.

I wish all of us a rich, creative, well-contested, and fruitful Forum.

Thank you once again for your presence and participation.

With my deepest respects.

Teşekkürler!

## Statement of the 18th Forum of the World Association for Political Economy

**August 2025, Türkiye**

The World Association for Political Economy (WAPE) is an international academic organization voluntarily formed by Marxist, Marxian, and other critical political economists and related academic groups worldwide. It aims to integrate the study of the political economy of our world, the global research forces in Marxist economics, and the theories and methods of evolving Marxist economics to study the world economy and national economic development; promote economic and cultural exchanges among the peoples of the world; and enhance their well-being. Since its first forum held in Shanghai, China, in 2006, WAPE has organized over twenty academic conferences in countries such as China, Japan, France, the United States, Mexico, Brazil, Vietnam, South Africa, India, Russia, Germany, Canada, and Greece. In 2025, marking the 20th anniversary of WAPE's founding, we convened the 18th forum at Yeditepe University in Türkiye. The theme of this conference is "Multipolarity in the 21st Century: Challenges and Opportunities in Political Economy." After in-depth discussions at this forum, we present the following statements:

1. The ongoing contemptible televised genocide in Gaza is a standing indictment of contemporary imperialism. It violates the basic postulates of humanity and human society. It is the most egregious instance of the malignant wars instigated by imperialist powers. They hinder human social progress and the improvement of livelihoods. Such wars include the Russia-Ukraine conflict, now in its third year; the recent Iran-Israel conflict; one that could possibly break out on the Korean peninsula; the one threatened against liberation forces in the Sahel; and the one threatened against China over Taiwan. Such wars not only cause immense loss of life and property in the regions concerned, but they also inflict more human

suffering by causing incalculable damage to international supply chains, productivity, and production relations. Marxist political and geopolitical economists worldwide should strengthen cooperation and conduct in-depth research on significant economic theories and practices related to such imperialist war.

2. This year marks the 80th anniversary of the victory over German-Italian-Japanese fascism and the 80th anniversary of the adoption of the United Nations Charter. The world today is undergoing changes unseen in a century at an accelerated pace. Opposing imperialism and hegemonism in economic, political, cultural, and military fields is critical to world peace, development, and security in the current era. The US's attempt to create a unipolar world system dominated by it never succeeded and is today in a shambles. A multipolar world order is taking shape instead. It recognizes the historical necessity of human socioeconomic development worldwide through development paths and models based on people's national conditions.

3. The world today is experiencing a new round of scientific and technological revolution, represented by new energy, new materials, digital technology, and artificial intelligence, as well as the sweeping transformation of the global political and economic landscape driven by this revolution. Rather than contributing to this revolution, the imperial world is instead engaged in speculation and disruption, creating uncertainties and instabilities in international political, economic, and social relations. They pose risks and challenges that test the political wisdom of leaders worldwide. As the profound changes unseen in a century accelerate, traditional mainstream theories explaining international political and economic relations increasingly reveal their inherent flaws. There is an urgent need for groundbreaking theoretical innovations, based on Marxism, to guide the new economic and political landscape and achieve the reshaping of the international economic order, as emphasized by the United Nations General Assembly for many years.



4. Today, senile monopoly capitalism is preoccupied with speculation and predatory lending through which to suck out value produced by working people and oppressed and exploited nations. It is incapable of expanding production, let alone doing it in an egalitarian manner that spreads prosperity to working people. Currently, BRICS+ countries and many others opposed to imperialism and hegemonism contribute more to global economic growth than the G7 countries. Building a community with a shared future for humanity signifies a shift in world history from the capitalist paradigm of “control and plunder” to one of “wide consultation, joint contribution, and shared benefit.” Marxist political economists worldwide must grasp this historical trend and make theoretical contributions to reshaping a just and equitable global

economic governance system.

5. The postwar system of international economic governance system was dominated by the imperialist countries. They ensured that the system led to the continuous flow of international surplus value and profits into the pockets of the private monopoly bourgeoisie in these countries. Today, unable to ensure such flows through the system, the imperialist countries have taken to leveraging technological, financial, and institutional hegemony through sanctions and blocking of trade and capital flows that fail to reinforce their declining imperial power while nevertheless damaging development. To reverse the deepening global polarization of wealth, the developmental rights and interests of Global South countries must be fully respected, supported, and protected.



Group photo of Forum participants in front of Yeditepe University Rectorate  
(Photo: BRIQ, 2025).



6. The already failing dollar system and its weaponization have severely disrupted normal economic exchanges among nations and harmed the developmental interests of peoples worldwide for decades. Therefore, we call for the reconstruction of a genuinely egalitarian and productively focused international monetary system that better aligns with the development of international productive forces, facilitates universal and equal interactions among nations, and ensures equal development opportunities and shared benefits for all countries and their peoples.

7. The ecological emergency, composed of pollution, biodiversity loss, and climate warming, is among the most significant challenges facing humanity today. The international community must work together to transform production methods and jointly forge a path for global ecological civilization. Marxist political economists worldwide should enhance exchanges and cooperation, shoulder the responsibility for the productive transformation necessary to address the ecological emergency, and deepen theoretical and policy research in environmental political economy and resource political economy.

8. The threat of nuclear war is closer today than ever. Militarily aggressive imperialist countries cannot be trusted to refrain from a repeat performance, as they have already shown their readiness to use nuclear weapons without justification and have used depleted uranium weapons with impunity since. Marxist and critical political and geopolitical economists worldwide must work on solutions that move the world away from the current balance of terror to build a world based on a balance of security, development, environmental sustainability, and peace.

9. The development of digital technology and artificial intelligence has the potential to boost productivity. However, the privatization and mo-

nopolization of technology inevitably distorts its development so as to extract surplus value and promote monopoly, threatening employment and the economic rights of the vast majority of laborers. China's proposal for the Global AI Governance Initiative, advocating wide consultation, joint contribution, and shared benefits, and its call to establish a World AI Cooperation Organization, are highly necessary and beneficial.

10. The complexity and contradictions of capital movement in the era of increasing multipolarity are manifold. They include contradictions among imperialist nations, between the bourgeoisie of imperialist nations and the working class of developing nations, within imperialist nations between the bourgeoisie and the working class, between imperialist nations and the Global South or socialist nations, and among more and less powerful imperialist nations. These intertwined contradictions significantly increase global instability. Therefore, achieving a just multipolar world requires opposing 21st-century imperialism, hegemonism, neoliberalism, neocolonialism, and neofascism in all their forms.

11. In a multipolar world, it is clear that the ideas that will advance humanity and broaden horizons are independence, public ownership, and peoplism. It has become clear that Marxism, developed under the needs of the age and each country, will be the founding and liberating ideology of the 21st century. The task before us is to establish a new international organization to institutionalize international cooperation. Drawing on the experiences of past international organizations, we must create a new international organization based on the fundamental dynamics of a multipolar world.

Marxist political economists of the world, unite and work diligently to build a peaceful, just, prosperous, and happy multipolar world! 🌸

## VALENTIN KHUKHLAEV\*



From the series VI World Festival of Youth and Students (August 3, 1957), Moscow.

*\*Born in Petrograd (Today St Petersburg) in 1936, Valentin Khukhlaev worked as a photojournalist for the Tass news agency for more than 50 years, conducting more than 1,000 photo interviews. Khukhlaev has exhibited his work in more than 30 national and international exhibitions. His photographs focus on industrial achievements and celebrations, as well as the post-war period.*

Source: Valentin Khukhlaev's Archive / Lumiere Gallery



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## GU HONGZHONG\*



The Night Revels of Han Xizai.

*\*Chinese painter Gu Hongzhong was a court painter of the Southern Tang dynasty who was active during the Five Dynasties and Ten Kingdoms period. 'Night Revels of Han Xizai' is his most well-known work, which no longer exists. A reproduction from the Song Dynasty (960-1279), currently housed in the Palace Museum at Beijing. The Night Revels of Han Xizai, which consists of five segments, is a painted scroll depicting Han Xizai, a minister of Li Yu. Han Xizai listens to the pipa, watches dancers, takes a rest, plays string instruments, and then sees guests off. The work was not only a painting about personal life but also depicted many distinctive features of that period. The details in the picture and the expressions of the people were vivid and close to the reality. There are more than 40 figures in the picture, which are all realistic and with different expressions. The painting indirectly represented the lifestyle of the ruling class of that time. The painter's impressive observation about Han Xizai places the painting in a unique place in Chinese Art history.*

Source: <https://smarthistory.org/gu-hongzhong-night-revels-han-xizai/>



PETER RADACINA\*



A caricature of World Peace Council member Nazim Hikmet, drawn by Canadian cartoonist Peter Radacina. (From the Nazim Hikmet Caricatures exhibition).

*\*Canadian cartoonist and painter born in 1949.*



## FORUGH FARROKHZAD\*



*\*Iranian poet, born on January 5, 1935. She is one of the most important Iranian poets of the modern period. She is also a writer, actor, director, and painter. She is the third of the seven children of Colonel Mohammad Farrokhzad and Touran Waziri-Taber. The satirical poet Forugh married Perviz Shapoor when she was 16 or 17 years old. She continued her education in Ahvaz with her husband. In 1962, she won awards in various parts of the world for her film Black House. In 1963, Forugh published his work Rebirth. It was a period of maturity in poetry, and his artistic level was high. With this book, the poet brought about profound and impressive changes in Iranian poetry. On February 13, 1967, she died at the age of 32 after breaking his neck in a car accident. She made a significant contribution to modern Iranian poetry, and after her death, her work was collected in a book entitled Cold Season. Michael Hillman published her life and poems in 1987 under the title Lonely Woman. Many more articles and books have been published about the poet's poetry and life, and a movie was made about his life. Forugh Farrokhzad's poetry is characterized by a deep sense of loneliness. In addition, in her poems, she addresses women's problems and criticizes the discrimination against women by Iranian society. These ideas have sometimes led to fierce debates. The poet also opposed the despotism of the Shah and demanded better rights and conditions for women in Iran.*

## HALLAJ\*\*

It appeared again in the water,  
 in the wind,  
 with the clouds of his hair,  
 that crimson red march again,  
 “Enelhak,”  
 was always on his lips.

You,  
 what did you recite in the “prayer of love”?  
 Years have passed since you were hanged,  
 yet still,  
 these old executioners  
 are afraid even of your death.  
 The afflicted lovers of Nişabur,  
 in intoxication,  
 intoxication and in that moment of truthfulness,  
 from beneath their lips  
 slowly  
 repeating your name in secret.

While you  
 on the gallows  
 silent and frozen,  
 we remained spectators  
 to the duty-bound executioners.

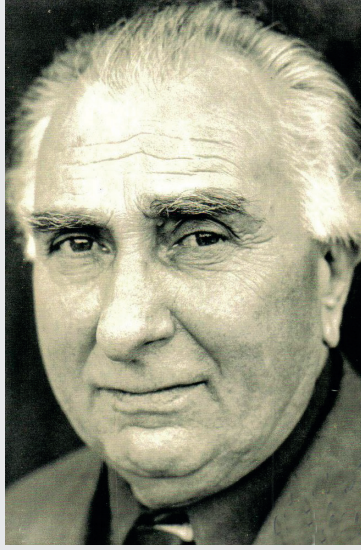
wherever the morning wind  
 scattered your ashes  
 a hero emerged  
 from the earth

In the streets of Nişabur  
 the drunkards of midnight  
 slowly  
 sing their crimson red songs

Your name,  
 is on everyone’s lips.



## HASAN İZZETTİN DİNAMO\*



*\*Born on January 1, 1909, in Trabzon, Hasan İzzettin Dinamo is one of the pioneers of contemporary Turkish poetry. He lost his father and older brother during World War I. The writer left Ankara Gazi Education Institute before completing his education and made a living by translating and giving private lessons, but he was persecuted by the oppressive governments of the period. Hasan İzzettin Dinamo made contributions to Turkish literature with a socialist worldview after meeting the poetry of the world-famous Turkish poet Nâzım Hikmet. He was held responsible for the events and the big explosions in Istanbul during the September 6–7 events and imprisoned. He was imprisoned for four years for mentioning workers' rights in his poem "Train." He continued his revolutionary struggle in prisons and exile. He wrote countless poems, novels, and epics in prison. In addition to works of poetry such as Lighthouse, Karacaahmet Symphony, Exile Poems, Fight Poems, Freedom Song, Poems from Mapusanem, etc., he wrote volumes of books about Turkey's rebellion against imperialism and the Turkish War of Independence: Holy Rebellion (eight volumes, 1966-1968), Holy Peace (seven volumes, 1972-1976), and Years of Fire are some of them. The revolutionary master poet Hasan İzzettin Dinamo died on June 20, 1989, in Istanbul.*

## NINETY-SEVENTH SONNET\*\*

In times to come, that my existence will not reach  
Just like now, on a sweet afternoon just like this one,  
In the pink haze where dreams fall drunk  
If my reader hears a noise similar to a heartbeat

Let him know that it is my heart that beats so passionately.  
These are the bitter roses of the hearth of pain  
Decorating the horizons with their poetic beauty.  
The most heartfelt time to dream is towards the evening.

You will be left alone in a field  
No one sees you except the eyes of the evening star,  
The girl you once loved has grown old, just like you, far away.

You have no universe other than your old dreams.  
Everyone is an enemy to your poetry, your thoughts, your bread,  
Only a single yellow light seeps through the centuries to come.









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## Common Security for Shared Development

"The security collaboration established by the Shanghai Cooperation Organization, which started out in the latter half of the 1990s under the banner of "the fight against the three evils," possesses a significant distinction from preceding platforms: Countries facing the same threats have convened and continue to convene for collaboration centered on shared development to guarantee collective security. Collaboration centered on shared development empowers emerging nations to strengthen together rather than depleting their resources through vicious and detrimental rivalry among themselves. This strategy prevents imperialism from interfering in the issues of developing nations."

*Editor-in-Chief*  
FIKRET AKFIRAT