

## Evolution of Colonial and Neocolonial Models in Geopolitical Dominance



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**Abstract.** The paper considers the architecture of modern neocolonialism. To this end we put forward simple structural and graphical models of traditional (colonial) and modern (neocolonial) systems, whose comparison reveals their differences. Further, we systematize comparative features of two dominance systems – colonial and neocolonial. We introduce the concept of colonial cycle, which means power castling – the process when power shifts from the mother country to its colony; a typical example is the relationship between the United States and the UK. We propose a structural and graphical model of a multipolar world, which highlights alliances of countries and indirect methods of struggle that States engage in so as to gain influence in their regional segments of the geopolitical system. We reveal the objective and subjective drivers of neocolonial castling: the scale effect; the balance of power effect, formalized as a structural balance; the globalization saturation effect that generates a “globalization / local culture” cycle; the political leader effect; economic patriotism. We put forward an expanded model of state success in the context of neocolonialism; this model, in addition to internal social achievements, takes into account the external effect in the form of political sovereignty. We show that many international comparisons lose their relevance within the framework of this model. A typical example of a false but well-established narrative based on a narrowed model of state success is the notion of South Korea’s more dynamic development compared to North Korea. We consider a modification of the extended model of state success using N. Machiavelli’s militaristic model as an example. The cognitive significance of the concept of colonial cycles in the context of geopolitical turbulence is discussed.

**Key words:** colonialism, neocolonialism, colonial cycle, country’s success.

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### Introduction

According to G. Arrighi, “the long twentieth century” (Arrighi, 2006) dramatically reformatted the geopolitical space of the planet. However, it is only now becoming partly clear to what extent the twentieth century was long. The past century has witnessed many qualitatively new things that are now continuing and becoming mature. Neocolonialism with all its attributes should be distinguished among such phenomena. Its features will be discussed in more detail below; for now, it is enough to point out the following: the primordial forms of these phenomena existed back in ancient times, but they were able to reach maturity only in the wake of the grandiose scientific achievements, technological breakthroughs and military disasters of the 20th century. This circumstance urges us to look back upon the events of the previous century, which we will rely on to reveal the essence of the issues raised.

However, the 21st century has contributed to the crystallization of neocolonialism too. The changes that accumulated over 125 years have reached a critical point when they cannot be disguised and become visually observable. The aim of the study is to reveal main features of the colonial and neocolonial models of geopolitical dominance in historical retrospect, highlighting their main characteristics and features. The novelty of the approach lies in designing our own structure of the effects under consideration, clarifying and revising the content of the main elements of the theoretical concept, as well as revealing the mechanisms of the modern model of the world order.

### Architecture of colonial and neocolonial governance regimes

The Age of Discovery gave rise to the era of colonialism, when *dominant countries* (suzerain countries) *formally* (de jure) and *actually* (de facto)

exercised ownership and administration of their *colonies* (vassal countries). In turn, after the Second World War, the last phase of the destruction of this relatively simple governance system began, ending in the 1960s, when almost all countries acquired the status of political sovereignty. However, formal elimination of the colonial system was almost immediately followed by the onset of neocolonialism. The first president of Ghana Kwame Nkrumah noted that the “end of empire” was accompanied by the flourishing of other means of enslavement in the former colonies: for example, the profits of British tin companies in Ghana reached 400%, and the dividends of British diamond industry shareholders amounted to about 350% (Nkrumah, 1965). Thus, former colonies were still being exploited, but in a slightly different format. These facts prove the establishment of *neocolonialism* around 1960, when colonies, having become formally (de jure) sovereign States, actually (de facto) remained under the patronage of the leaders of the world economic system. At the time, the old colonial model of the world was replaced by a neocolonial one, and the process of governing neocolonial countries by new empires became largely *invisible*. Consequently, the new period of the geopolitical system is characterized by *covert (implicit or indirect) governance* of the new vassal countries, which are called the “third world”, by leader countries. In other words, the essence of relations between countries has remained the same; only the form has changed, becoming less explicit and more camouflaged and sophisticated.

Currently, such an understanding of colonialism and neocolonialism corresponds to well-established ideas, the range of which is rather narrow. Thus, in addition to the traditional understanding of

colonialism as a practice of one nation dominating another, Guillermo Perry rightly believes that colonialism is associated with the *physical conquest* of a nation by penetrating its territory, and neocolonialism (imperialism) means *taking control* of another State through politics and ideals (Perry, 2015). The research on new mechanisms and forms of neocolonialist “partnership” has been going on for more than half a century (Shchetinin, 1972). Scientific literature of the Soviet period already considered functional areas of neocolonialism such as technology aid and food aid, along with the activity of international organizations; all those areas were gradually depriving the postcolonial powers of their political sovereignty (Bokeriya et al., 2022).

Modern studies note that neocolonialism as a model of unequal economic relations between different countries is linked to the process of globalization and prevents many States from adapting to the requirements of the Fourth Industrial Revolution and modern technological challenges (Morozenskaya, 2019). A crucial role in political control over satellite countries belongs to *transnational corporations* (TNCs), which penetrate the markets of developing countries, seize their most profitable economic sectors, and participate in working out and implementing strategic policy decisions (Sirotkina, 2020). Unlike the policy of traditional colonialism, which relies on the representatives appointed by the dominant country to govern the colony, neocolonialism relies on the *ruling elite from among the indigenous population* of the dependent country, who have received educational and ideological training in the hegemon country (Dubrovin, 2019). Moreover, a new field of research has recently emerged, the technopolitics of specialization, it focuses on establishing unequal positions based on the hegemon country’s control over techno-epistemic networks responsible for the supply of reliable information; such a monopoly glosses over the persistence of neocolonialism especially in the Global South (Imbong, 2023).

The same goal is pursued by methods that help to maintain financial neocolonialism, when through multinational corporations and monetary unions, European countries take control of the financial development of many African countries, preventing them from achieving financial sovereignty. These monetary associations primarily include the West African Economic and Monetary Union and the Economic Community of Central African States. Since the development of financial technologies can help countries to end their colonial dependence, European States are pursuing a counterattacking strategy aimed at limiting the use of financial technologies and cryptocurrency markets (Ratnikov, 2024).

Researchers also note the existence of ideological veil regarding neocolonialism, when the failures of postcolonial countries and civil wars in Africa are explained by purely internal factors like conflicts between local communities, pathology of regional elites, the national “greed and discontentment” syndrome, anarchic attitudes and the “new barbarism” of indigenous peoples. Contrary to such opinions, the literature examines in detail the role of American neocolonialism in aggravating the problems of Third World countries and, in particular, in unleashing the first civil war in Liberia (Kieh, 2012). A number of studies considering the exploitation of Chinese workers in the British Transvaal Colony at the beginning of the 20th century trace the historical origins of modern Western neocolonialism, based on double standards and postulating the initial inequality of the contracting parties (Fituni, 2023).

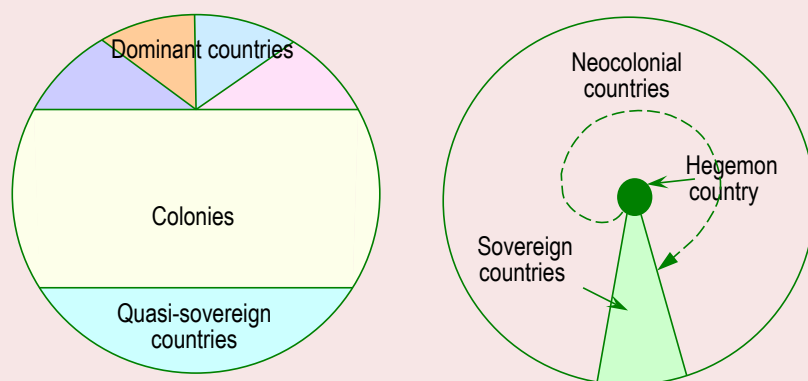
What has been mentioned above is quite enough for understanding the specifics of modern neocolonialism. A schematic explanation of the two stages in the development of the world economic system is presented in *Figure 1*, which shows the plurality of dominant countries in the colonial period (left diagram) and the geopolitical cycle in the phase of neocolonialism (right structural model). Indeed, at an early stage, Portugal, Spain,

the Netherlands, Great Britain, Belgium and other countries were colonial powers; the vast majority of the rest of the world was a zone of their colonial possessions. At the same time, there were countries that could be called *quasi-sovereign*. These include China, which was never formally a colony, but for 200 years was largely under the limited protectorate of Britain; Japan also avoided falling into the category of a colony by delicately balancing on the edge between concessions to European traders and maintaining its statehood against the backdrop of active economic modernization. The Russian Empire fought for its independence with varying success, while simultaneously remaining in a state of permanent war with Western countries and in the cultural orbit of Europe. In this regard, the world economic system itself looked like a puff pastry pie (left diagram of Fig. 1): dominant countries were on its top; they were fed by colonies' resources from below; and on the outskirts of the system there were satellite countries, seemingly independent but strongly involved in the general logic of dominant countries' development.

Since the 1960s the colonial model has been replaced by the neocolonial one, and a single and extremely strong world leader, the United States, has crystallized, taking the position of the core of

the geopolitical system. According to G. Arrighi's theory, each historical center of world capital has mastered a new (additional) managerial function (power) (Arrighi, 2009). In the 20th century the United States, having become a global power, mastered three essential skills – the ability to *protect* its interests anywhere in the world, *produce* a huge mass of goods within the country and *integrate* (i.e. internalize) all world markets into the orbit of its interests (Arrighi, 2009, p. 39). The fourth skill – to *reproduce* their own capital accumulation regime within the established geographical jurisdiction – turned out to be beyond their capabilities. However, the previous three functions were enough for the United States to build a neocolonial system, where only one country acted as the core of the world system, dragging all other countries into the orbit of its interests (this circumstance is shown by the dotted spiral in the right diagram of Fig. 1). World War II weakened all European countries, which lost their status as sovereign hegemon countries and gradually became dependent on one of the giants – the USA or the USSR. In parallel, since the 1960s, countries that acquired unprecedented political sovereignty were finally localized. This is the USSR, which claimed to be a world leader, and the countries that were part of the alternative

Figure 1. Comparison of two models of the geopolitical system



Source: own compilation.

colonial empire it created – the world system of socialism, i.e. the zone of its influence<sup>1</sup>. This block of countries opposed the United States, preventing it from carrying out steady spiral movement of capital accumulation (this fact is shown in the right-hand diagram of Fig. 1 in the form of a dark segment of countries that have become an obstacle to the natural movement of capital). In such circumstances, the U.S. logically faced the task of moving to more sophisticated methods of maintaining its hegemony aimed at clearing the geopolitical space and eliminating an alien segment of sovereign countries; these methods became an organizational framework of neocolonialism. The main features of the two dominance regimes are shown in *Table 1*.

The period of neocolonialism is characterized by gradual mutual recombination of segments of neocolonial and sovereign States. So, in 1952 and 1960 Britain and France joined the nuclear club, signifying their political sovereignty; in 1964 and 1974 China and India joined this pool of countries, respectively, and in 1979 Israel joined it unofficially<sup>2</sup>.

Thus, the United States was forced to take these countries into consideration, but in the post-war years there was a pendulum movement along the line of strengthening/weakening U.S. hegemony.

Thus, after the First World War, the United States “took over” the UK’s position as a global exporter of capital and producer of goods (including food and weapons), and during the Second World War, as part of the destroyers-for-bases deal, they turned the network of British military bases into their own system of strategic dominance<sup>3</sup>. Since then, the UK, having lost its overseas possessions, started turning back into a relatively small island country with a culture close to the American one, which slowly but surely led it to voluntarily join the U.S. foreign policy. France, being surrounded by puppet European powers, also gradually slipped into the zone of influence of the United States. We agree with M. Houellebecq, who wrote that “even such authoritarian and determined leaders as General de Gaulle proved powerless to resist the vector of history; the whole of Europe turned into a remote, aging, depressive and slightly awkward province

Table 1. Comparative characteristics of the two dominance systems

Characteristic	Dominance type	
	Colonialism	Neocolonialism
Period of existence	1500s–1960s	1960 – present
Object of interest	Territory + resources	Resources + population
Type of control	Open, official (de-jure)	Hidden, unofficial (de-facto)
Way to influence society	Military (physical) pressure	Organizational, financial and ideological control
Origin of the power elites	Delegated from the dominant country	Nourished among the local population
Vector of pressure on the masses	Forceful suppression (hard power)	Ideological rewiring (soft power)
Channels of influence	Direct management + TNCs	TNCs + indirect management (food, technology, international)
Number of world centers of influence	Several	One
Scale of influence of world centers	Considerable	Overwhelming
Source: own compilation.		

<sup>1</sup> Strictly speaking, the USSR’s zone of influence was not entirely a colonial system, due to the fact that the dominant country did not set out to squeeze out all the resources of the colonies, but on the contrary, provided them with fairly substantial assistance free of charge. Nevertheless, the effect of the zone of influence took place and looked similar to the colonial system.

<sup>2</sup> Israel has not yet conducted nuclear tests, and therefore its official status as a nuclear power remains unconfirmed.

<sup>3</sup> *Amerika protiv vseh. Geopolitika, gosudarstvennost’ i global’naya rol’ SShA: istoriya i sovremennost’* [America Against Everyone. Geopolitics, Statehood, and the Global Role of the United States: History and Modernity]. Moscow: Sodruzhestvo kultur, 2023.

of the United States of America” (Houellebecq, 2023, pp. 521–522). A detailed anatomy of how the French were reformatted into Americans is given by Régis Debray in his book (Debray, 2019). He claims that the process is connected with an ongoing objective civilizational reconstruction<sup>4</sup>. In contrast to this process, the nuclear club expanded, admitting Pakistan and North Korea in 1998 and 2006, respectively. Thus, global influence of the United States in the era of neocolonialism increased against the background of an opposite trend toward expanding the bloc of sovereign countries.

In the 1990s, as Z. Brzeziński rightly noted, the “third world” disappeared due to the disappearance of the “second world” (Brzeziński, 2007, p. 33): the United States and its satellites (the first world), the USSR and its satellites (the second world), and the non-aligned countries (the third world) no longer represented a meaningful geopolitical construct after 1991, because now it was possible to join only one center of power – the United States; such non-alignment meant that a country was politically on its own. All this once again proves the qualitative incompatibility of the two historical stages – traditional colonialism and modern neocolonialism, and indicated a fundamental reformatting of the global geopolitical space in the 20th century. By the beginning of the 21st century, the role of the hegemon country had grown to an astounding absolute.

#### **Neocolonialism and imperialism: Related issues**

Discussing the genesis of neocolonialism requires clarifying some related and intertwining concepts and phenomena.

First of all, there is no doubt that elements of neocolonial domination emerged back in the colonial period, i.e. the regimes of colonialism and neocolonialism existed simultaneously during the 1850s–1960s. It was due to the phenomenon of

imperialism, which had already emerged by that time and aimed to make capitalism a dominating force throughout the planet (Lenin, 2019). For example, European countries used debt to financially subjugate the Ottoman Empire in the second half of the 19th century, taking into account its formal (imperial) sovereignty (Anderson, 1964). Already during this period, pressure was exerted on peripheral countries not only to seize their natural resources, but also to control their markets. In this regard, we can say that there has always been a mixed system of world governance combining colonial and neocolonial dictatorship methods. The role of neocolonial instruments in the colonial period was supportive, while in the neocolonial period it became crucial. In fact, the difference between the two regimes lies in changing the relative importance of each of them, but this does not negate the fundamental difference in the stages according to which the developed countries established their dominance.

The next point is related to the fact that the lexicon of international political economy contains two notions: “neocolonial countries” and “dominated countries”. In particular, the term “dominated countries” was introduced and considered in detail by Alexander Gerschenkron (Gerschenkron, 2015): it suggests a delay in some countries’ access to “economic modernity” due to the late introduction of technological advances and due to interference from the countries that entered this modernity first (Landes, 1969). At the end of the 19th century Japan and Russia were dominated countries; while being independent States, they were fighting for access to economic modernity. In this regard, it is necessary to distinguish between the two notions under consideration. In our opinion, neocolonial countries are those that de facto do not have political sovereignty, and therefore cannot actively participate in the struggle for modern technologies and institutions; dominated countries include those that have already gained political

<sup>4</sup> See: How we all became American. Available at: <https://inosmi.ru/20170817/240059228.html>

sovereignty, but have not yet been able to gain wide access to modern technologies and institutions due to unfavorable historical circumstances. As noted above, at the end of the 19th century Japan and Russia were among the dominated countries, India and China joined this pool in the 20th century, and North Korea and Iran in the 21st century. As a rule, dominated countries carry out a full-fledged mobilization to achieve modernization. For example, India, having lost its colonial status, turned into a dominated country that built its own system of economic planning (Bhagwati, Desai, 1970) against the background of the unification of various intra-Indian nationalist movements (Dube, 1988). Interestingly, transformations of the dominated countries into neocolonial ones are also possible. This happened to Russia after the collapse of the USSR in 1991, when the country became directly, though not completely, dependent on the United States, becoming essentially a neocolonial State and unable to fully implement its development. Something similar happened in the 21st century to European countries, which, being technologically advanced modern States, finally lost their political sovereignty and found themselves completely in the orbit of U.S. influence without the right to express their own will on fundamental issues of foreign policy.

In view of the above, we can argue that the status of a dominated country is a transitional case – from a neocolonial and undeveloped State to a sovereign and developed one. In this interpretation, a dominated country is a sovereign country, but it is undeveloped and has not reached the modern level of modernization (for example, North Korea); or, exactly the opposite, it is developed, but does not have full-fledged sovereignty (for example, South Korea). For our analysis, the dominated countries can be classified as neocolonial in the sense that they are all dependent States that have to overcome either their lack of self-confidence or their underdevelopment.

Another aspect to be clarified is how the above scheme of neocolonialism relates to the existing concepts within the framework of the so-called “dependency theory”. In this case, the neocolonial model in Figure 1 is a development of Wallerstein’s “center – periphery” model (Wallerstein, 2006), in which the center shrank to a single country, and the periphery and semi-periphery merged into a group of dependent and independent States. The paper (Balatsky, 2024) puts forward a political model of sovereignty, which, along with Wallerstein’s technological model, produces a model presented in Figure 1. We assume that such a system naturally fulfills the Prebisch – Singer hypothesis, according to which the price of primary commodities relative to the price of manufactured goods declines in the long term, which causes the terms of trade of primary-product-based neocolonial countries to deteriorate. Currently, statistical tests generally confirm this idea (Arezki et al., 2014). We can assume that our model continues and elaborates on the ideas of dependency theory. In any case, they cannot be contrasted in any way. Nevertheless, we should note that dependency theory, by default, proceeds from the sovereignty of each country, including those in the periphery and semi-periphery. We emphasize that all these countries, as a rule, are not independent players in the geopolitical system, but in many ways follow the policy imposed on them from the outside.

Finally, here is an important point concerning the dialectics of the processes of formation and destruction of colonial systems. They are closely related to the actions of national elites, who themselves are extremely heterogeneous and may adhere to completely different views on the development of their country. The struggle between intra-elite groups, as well as consolidated elites with external pressure, cannot be linear and simple. This is where complex processes arise, emerging trends are being reversed, etc. All the schemes we discuss are stylized and simplified, whereas in reality all the

processes are very confusing and their general logic is sometimes difficult to recognize. Nevertheless, if we discard all the specific layers, then what is left will represent the very schemes we are discussing here; this justifies some simplifications we have to make.

### **Colonial cycles as a new phenomenon of the 20th century**

The advent of the era of neocolonialism coincided with the emergence of a new phenomenon – *colonial cycles*, which we define as power casting, *a process when power shifts from dominant countries to their colonies, regardless of dominance status (de jure or de facto)*. We emphasize that this is not a simple alternation of dominant countries, which took place already during the period of traditional colonialism, but rather the transformation of the governing subsystem (dominant country) into a controlled one (colony), and vice versa, the controlled subsystem (colony) into a governing one (dominant country). Let us consider this process in more detail.

The United States has long been Great Britain's colony and was created by the joint efforts of migrants from Europe. After gaining independence and expanding its borders, the United States began an independent and very dynamic development, gradually outstripping former mother countries of the time, in terms of population, production volume and technology level. The First and Second world wars played a fatal role in the history of Europe, as relatively small European countries lost their influence; and the giants – the USA and the USSR – stepped onto the world stage. Europe itself was divided between these giants, and the sovereignty of even the leading European powers was shaken. During the Cold War only two European members of the nuclear club, the UK and France, maintained their political independence. However, as mentioned above, by the end of the Cold War they lost independence in many aspects, too. In 1990, when the defeat of the USSR in the global confrontation became obvious, the United States emerged as the dominant political architect

of Europe, lobbying for the unification of West and East Germany. Zb. Brzeziński noted that at the last stage of the Cold War there were disagreements about the reunification of Germany: for historical reasons neither the UK represented by Margaret Thatcher, nor France represented by François Mitterrand shared the determination of George H.W. Bush and Helmut Kohl to put an end to the division of the country (Brzeziński, 2007, p. 28). Bush not only convinced his British and French allies that a new Germany would not pose a threat to their interests, but also undertook to ensure this (Brzeziński, 2007, p. 61).

Later, a united Germany joined NATO; and after the collapse of the USSR the United States faced an even more ambitious task – to unite Western and Eastern Europe. But it cannot be done when the two groups of countries belong to different military blocs, one of which has ceased to exist. A logical step was to unite the whole Europe under the auspices of NATO on the military grounds; this created the foundations for its economic integration, removal of visa barriers, weakening of border control, etc. Thus, the United States, almost five centuries after its foundation by European immigrants, acted as the architect of the European Union in the form of its malleable and culturally homogeneous strategic partner. From that moment on, the whole of Europe, including France and the United Kingdom, became a neocolonial zone for the United States, with all the ensuing consequences. This is how the *global American-European casting* took place: the United States remained a colony of Britain until 1776; then the two countries coexisted politically for more than two centuries, which ended after 1990 when Britain finally turned into a neocolonial satellite of the United States; the colony and the dominant country switched places.

Today, Europe's subordinate position in relation to the United States is especially obvious. One of the tools to ensure the *homogeneity of European policy* is a supranational body, the European



Commission, whose current head Ursula von der Leyen oversteps her authority on a regular basis by excluding national governments of EU countries from decision-making and being guided by the opinion of a small group of advisers<sup>5</sup>.

Even more complex processes engulfed the Soviet Union, which, being the most powerful neocolonial State after 1945, lost not only influence beyond its borders, but also part of its own lands after the collapse. Moreover, at the early stage of building socialism, China entered the orbit of Soviet politics, but since the late 1950s it has aimed at joining the alternative pole of power – the United States. Thus, China turned from a neocolonial zone of the USSR into a neocolonial offshoot of the United States. Then, after more than 60 years, China enhanced its political sovereignty and turned into a dominant country exerting influence in many parts of the world. As for the USSR, after 1991, its successor, the Russian Federation, turned into a neocolonial power with a puppet government, without its own ideology and development strategy. This is one of the dramatic features of Russia's history: when India, China, Iran and other countries with a difficult colonial past gained the long-awaited political sovereignty, Russia lost it.

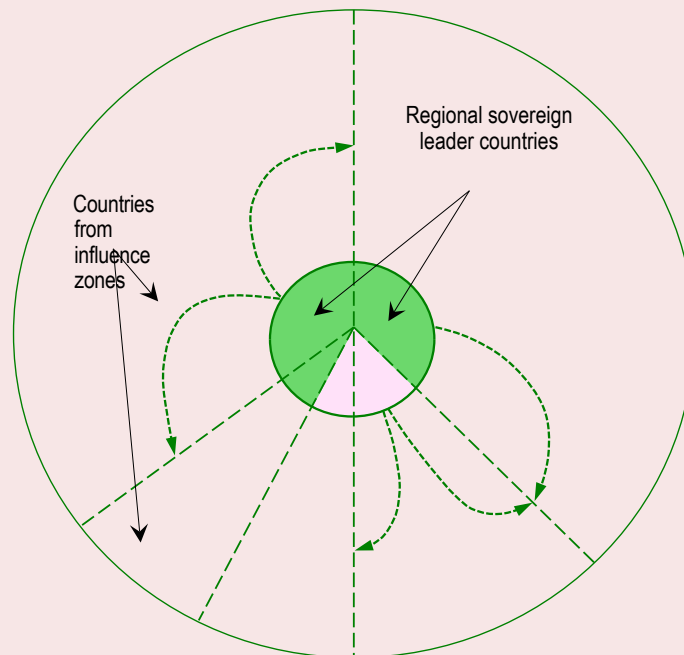
Thus, the era of neocolonialism is highly dynamic: the geopolitical positions of countries are changing dramatically over several decades, whereas during the period of traditional colonialism a country could remain in a subordinate position for centuries. In addition, the scale of the current geopolitical castling moves is truly enormous. For example, not only individual European dominant countries (the city-states of Genoa and Venice, the Netherlands, and the United Kingdom) have lost their positions as power centers, but the entire European continent as well, which is gradually turning from the regional core of the geopolitical system into its semi-periphery.

<sup>5</sup> See: "Like a queen". A scandal broke out in Europe over von der Leyen. Available at: <https://news.mail.ru/politics/58246250/?frommail=1>

The main conclusion is that the neocolonial system possesses tremendous dynamism; therefore, any country has a chance to reverse its initially unsuccessful political situation. However, it is quite difficult to derive a winning formula for gaining sovereignty. In fact, a transcendental formula Evolution/Fate/Fortune (EFF) comes into play here; it is based on the *single chance principle*: if a favorable situation was not taken advantage of, then there will be no such opportunity in the future; its alternative formulation is as follows: if it did not work out once, it will never work out again (Balatsky, 2024). The single chance principle includes the factors of Evolution, Fate and Fortune. This means that in reality too many unique circumstances must coincide so that a colony could break free from its hegemon. India and Pakistan are good examples of how difficult and painful it is to get away from the patronage of the dominant country. Suffice it to recall that these countries, having freed themselves from the dictates of one hegemon (Great Britain), were immediately drawn into the orbit of another (USA). Nevertheless, global castling moves between colonies and dominant countries occur with amazing regularity.

Currently, civilizational dynamics witness a clash of opposing trends – toward globalization and toward sovereignization. The 2008–2009 global financial and economic crisis provoked a downward trend in globalization, aggravated by the COVID pandemic and sanctions restrictions against Russia (Kirdina-Chandler, 2022). Apparently, the events of 2022, when the United States launched a proxy war with Russia on the territory of Ukraine, triggered the upward trend of sovereignization and the gradual destruction of the modern system of neocolonialism. The resulting confrontation initiated the creation of geopolitical alliances of countries, and delimited the zones of influence of such regional centers of power as the United States, China, Russia, Iran, etc. These processes have disrupted the original neocolonial model (right-hand diagram of Fig. 1) and launched the formation of a multipolar world

Figure 2. The model of a multipolar world



Source: own compilation.

model (Fig. 2). The center of this model is no longer represented by a single hegemon, but rather by several powerful sovereign States (the dark core in the center in Fig. 2), each of which has its own zone of influence represented by many countries in different regions of the world (the countries shown in Fig. 2 between the bordering radii of the regional leader State). The struggle between regional centers of power goes on not so much directly among themselves as by expanding their boundaries of influence and reducing the boundaries of influence of their competitors (this process is shown by dotted lines with arrows in Fig. 2). This model of political competition creates an organizational springboard for subsequent neocolonial cycles.

Today, discussions have already begun about what the model of the new world order will be – unipolar, multipolar or bipolar (Kirdina-Chandler, 2022). It is already obvious that a certain bipolar model will prevail with a movement toward the formation of additional centers of power. In this sense, the model in Figure 2 can be interpreted as

a natural generalization of a possible geopolitical configuration.

We should note that the colonial cycles have both global and local dimensions. So, in addition to the castling between the leading centers of power discussed above, there occur less significant, background rearrangements in the priorities of nations and peoples of the world. An example can be found in Portugal's relations with its former colonies, Brazil and Angola.

Thus, back in the 19th century there emerged certain discrepancies between the Portuguese language and the Brazilian Portuguese dialect. In 2008 the Portuguese Parliament voted to amend the spelling to bring the language closer to the Brazilian norm. The agreement on language reform, approved by parliamentarians, standardized the rules of writing and added three letters to the alphabet: k, w, y. In Portuguese spelling, mute consonants should disappear: for example, the word “optimo” should be written the same way as it is pronounced – “otimo”. The majority of deputies supported the

draft submitted by the government, according to which the changes will be introduced gradually over the next six years. Supporters of the reform believe that it will make Portuguese more universal, and it would be easier to browse on the Internet. In addition, the unification of the rules will help to avoid potential discrepancies in the interpretation of certain legal documents. However, opponents of the reform argue it is a capitulation to Brazilian influence; 33 thousand people signed a petition against the move. It is noteworthy that the rules adopted by the Portuguese Parliament were agreed upon back in 1991 with seven countries (Brazil, Angola, Mozambique, Guinea-Bissau, Cape Verde, São Tomé and Príncipe, Timor-Leste), whose official language is Portuguese<sup>6</sup>. Thus, the former colonies are successfully pushing even their linguistic norms and initiatives in their former mother country, which once again shows the scale of the cultural flip-flop effect.

In addition to the above example we can point out a shift of economic activity from Portugal to Angola at the beginning of the 21st century. Thus, in 2003 a large number of those who for various reasons had left the country during the civil war began returning to Angola<sup>7</sup>. At the same time, indigenous Portuguese joined this process, hoping to find a more suitable job in Angola or even launch their own business. Many Portuguese saw the former colony as a more interesting place to live and work. Here we are already faced with an economic flip-flop effect.

The rise and fall of different countries is typical for the history of human civilization. In this sense, colonial cycles are a natural manifestation of this general principle. While shifting the balance of power between hegemon and colony is an extremely interesting and important phenomenon in geopolitical dynamics.

<sup>6</sup> See: <https://www.rbc.ru/society/17/05/2008/5703cc8d9a79470eaf76aa64>; <https://fishki.net/2781045-prowaja-portugalyskij-zdravstvuj-brazilyskij-interesnye-fakty-o-jazykah.html>

<sup>7</sup> See: <https://ria.ru/20030222/327739.html>

### Determinants of colonial cycles

The existence of colonial cycles has been shown above; and this urges us to think why they occur and what forces drive geopolitical processes. Without going into unnecessary details, we note the objective and subjective determinants of the colonial cycles. Let us look at them in more detail.

1. *Scale effect*. Recent studies of the history of humankind over 70 thousand years demonstrate that the main driver of civilizational dynamics was the so-called *scale effect*, according to which an increase in production (scale of activity) leads to an increase in its efficiency (Sachs, 2022). The existence of scale effect naturally led to constant competition for it – different countries fought for their own growth and external expansion, because this made them even stronger and more effective (Balatsky, 2024). However, scale effect is a “living thing”, i.e. it tends to be gradually exhausted, when further geographical and industrial expansion no longer leads to increased efficiency, but on the contrary, generates failures in it.

Formally, the scale effect in relation to external expansion is as follows:

$$dP/dC > 0, \quad (1)$$

where  $P$  – labor productivity of the leader country (or per capita GDP);

$C$  – cost of the country’s external expansion.

According to logic (1), an increase in the cost of maintaining global dominance should lead to an increase in the efficiency of national production and the welfare of the nation.

In relation to the United States, the workings of this effect can be illustrated in the following stylized, but quite adequate way. After 1945 the country began its rapid external expansion, which involved seizing economic markets in various parts of the world while backing this process up with military means by creating military bases where necessary. Military control over the “conquered” countries guaranteed the absence of sudden and unfriendly

economic decisions that could be made by their governments for American businesses to deal with; this increased the profitability of national production and trade. The United States has come a long way in this direction, having established about 750 military bases around the world (Sachs, 2022). During this campaign, the rest of the countries were developing and many of them were also actively exploiting the scale effect; as a result, the United States found itself in a situation where further increasing the cost of expanding the network of military bases no longer increased the economic efficiency of national businesses and, consequently, did not pay off. Thus, there emerges a simple dilemma: either abandon further external expansion and focus on consolidating the already established power structure, or continue expansion with a decrease in the effectiveness of the national economic model with the risk of unexpected market failures and all the ensuing consequences. At this point there emerged a trend when the most powerful countries started gaining sovereignty; they subsequently become alternative centers of power and embarked on a journey toward external expansion and exploitation of the scale effect.

2. *Balance of power effect.* It is another strong objective factor in undermining the monocentric model of the world and the emergence of international castling in the geopolitical space. One can agree with K. Waltz regarding the role of this principle: “If there is any distinctively political theory of international politics, balance-of-power theory is it. And yet one cannot find a statement of the theory that is generally accepted” (Waltz, 1979, p. 117). Some attempts to verify the power indicator miss the rule of the initial principle itself (Balance of Power..., 2021), and it is quite difficult to check whether the options for setting the rules comply with reality (Degterev, Khudaikulova, 2018). Although there are many formulations and interpretations of the balance of power principle today, its consensus form has not been determined

(Zobnin, 2014). Recently, interesting attempts have been made to compare the balance of power effect with various social, economic, and military cycles (Fenenko, 2022).

With that said, let us give our interpretation of the balance of power effect, embedded in a more general scheme of the world order. To do this, we will use the following structural balance:

$$\left( \frac{\text{World order}}{\text{Equilibrium}} \right) = \left( \frac{\text{Dominance of the center}}{\text{Monocentricity}} \right) - \left( \frac{\text{Balance of power effect}}{\text{Multipolarity}} \right). \quad (2)$$

The balance of power rule (BOP) (2) suggests that the excessive pressure of the hegemon country on the participants of the world economic system causes them to respond by forming various alliances capable of weakening the power of the center. Of course, the BOP is not so much a quantitative as a qualitative construction for understanding the general course of events. According to it, consensus on the established world order allows the system to be in a state of equilibrium or close to it (quantifiably, this can be expressed by a value close to zero). However, various events such as the strengthening of some countries can cause excessive pressure on them from the hegemon country and thus generate some *positive tension* in the system in the form of dissatisfaction with the restrictive policies of the center. If this discontent covers several countries, it provokes their unification and opposition to the established rules, thereby generating *negative tension* in the form of actions to destroy the previous order. The long-term persistence of significant positive tension in the global economic system is fraught with global stagnation, and excessive activity of the balance of power effect can lead to military clashes of various intensity.

Under a monocentric regime, when the power of the leader country is generally recognized and it performs a relatively successful regulatory function, the balance of power effect does not manifest itself; if new centers of power are growing in the system,

then the pressure of the hegemon country provokes a policy of containment against them; and on their part, the balance effect is spreading through the system and triggers a multipolarity regime. In reality, the modern world is rather hybrid, combining the features of uni- and multipolarity (Nye, 2023, p. 70). In this sense, we can say that in some historical periods the world tends toward a monocentric regime, while in others it tends toward multipolarity.

Since the world does not remain in the same condition, forces are constantly emerging in it that call into question the legitimacy of the established world order. For example, the “spillover” of the scale effect from a hegemon country to other countries changes the geopolitical disposition and automatically activates the BOP in formula (2). The joint and partially coordinated actions of countries dissatisfied with the old order provoke its destruction and the establishment of a new one. And it is within the framework of this process that the neocolonial castling of countries takes place, when some gain independence and others lose it.

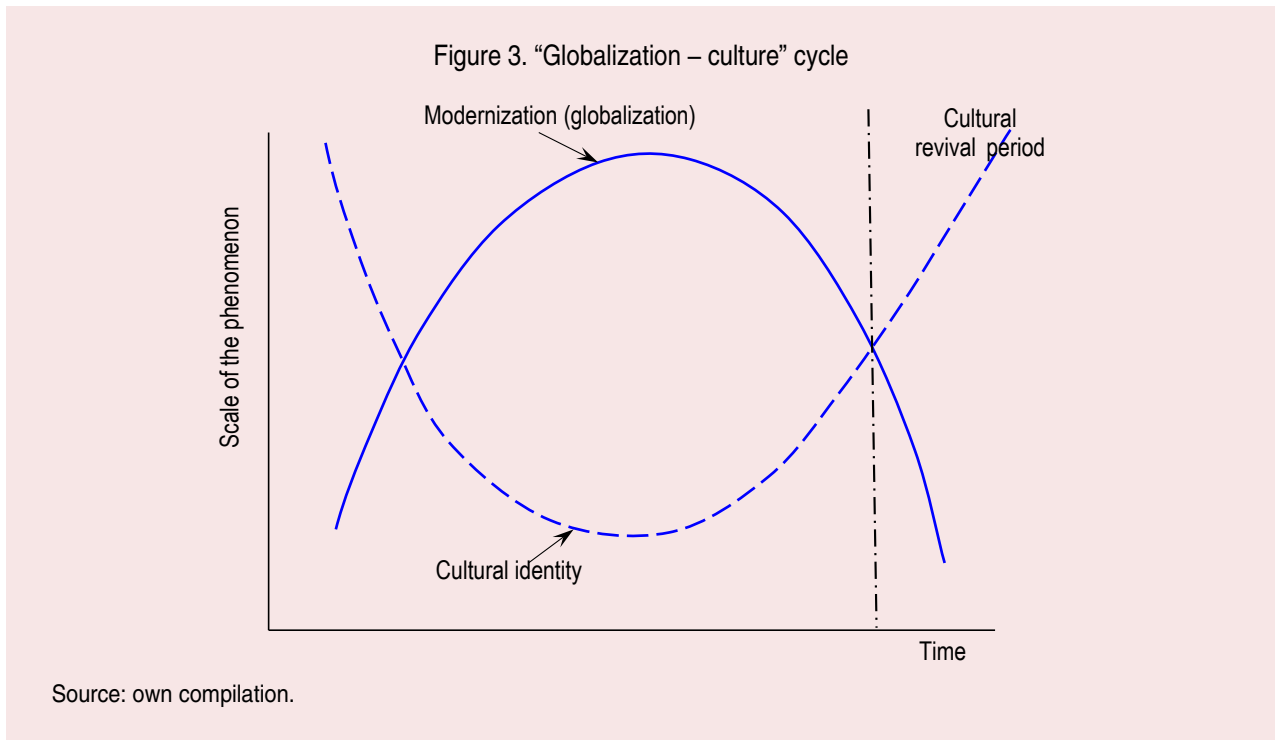
We cannot ignore the fact that the BOP is often subjected to critical attacks from influential experts. One of these is J. Nye, who considered the BOP to be too mechanical (Nye, 2023, p. 36). However, his specific examples are inconclusive, if not erroneous. First, he believes that countries often join not the weak side, but the strong side, as happened with Mussolini’s Italy joining Hitler’s Germany in World War II (Nye, 2023, p. 37). However, this even already occurred during a period of multipolarity and geopolitical turbulence, when Britain’s hegemony was denied by both of these countries and their leaders. Second, in his opinion, the geographical proximity of some kind of danger is of great importance: an example is Europe and Japan joining the United States after 1945, rather than uniting against it, although the U.S. was the most powerful country in the world. However, this is a clear distortion of the facts – neither Western Europe nor Japan made their own decisions after

the nuclear bombing; history made this choice for them under direct pressure from the United States. Therefore, we can agree with Nye that the BOP is not a mechanically accurate model of international relations, but we do not have sufficient grounds to reject it completely.

3. *Globalization saturation effect.* Another factor of colonial castling is what can be called the *globalization saturation effect*. The fact is that, as J. Nye rightly pointed out, it is necessary to take into account a complex interplay of globalization and national culture. Thus, a hegemon country that generates globalization of its culture and thus causes modernization of society in any other country in the world has its own limit of influence: sooner or later modernization ends and the cultural identity of the country is what ultimately remains (Nye, 2023, p. 148). Continuing Nye’s logic, we can imagine the process of globalization in the form of two non-linear trends: globalization of the culture of a hegemon country with concomitant modernization of the society of a recipient state and cultural self-identification of the local people (Fig. 3). At a certain point in time, the first trend (solid line in Fig. 3) weakens, and the second one (dotted line in Fig. 3) strengthens. At this moment, the cultural renaissance of the nation begins, and the previous era of “hamburgerization” ends<sup>8</sup>. This effect plays into the hands of the anti-colonial movement.

4. *Political leader effect.* It would be wrong to try and eliminate the subjective factor from the process of a country’s movement toward sovereignty.

<sup>8</sup> A typical and simplest illustration of the weakening of globalization trends is the double castling in public catering that took place in Russia: after 1991, the American fast food chain McDonald’s gained enormous popularity in the country, but it was gradually replaced by shawarma production stands, restaurants that serve Georgian cuisine, and other establishments with a local cultural basis; after the company left Russia in 2022, its place was taken by a new Russian network, “Vkusno – i tochka”, without any harm to consumers. Similar processes unfolded after 2022 when such popular foreign chocolate brands as Mars, Snickers and Bounty were replaced and supplemented with a wide range of domestically produced candy bars. These are just illustrations of the general thesis.



The State should have its own leader of the movement, capable of adding the necessary vector to all transformations. At the same time, we cannot name any a priori properties of such a person. This process is largely unpredictable and transcendental. In this regard, it is appropriate to recall Mohandas Karamchand Gandhi, who became the leader and ideologue of the movement for India's independence from Great Britain. And this despite the fact that the man was a vegetarian all his life and was concerned by what he could eat and what he could not; this was a man who, in adulthood, could not speak publicly and was not even able to read a report he himself had written; the idea of nonviolence he preached did not correspond in any way to the severity of the confrontation with the hegemon country; he was small, fragile, bold and wore glasses; all this also did not contribute to the persuasiveness of his speeches, etc. (Gandhi, 2021). Despite this, his case was ultimately successful. At the same time, it would be a mistake to attribute all the achievements in the liberation of India to its national leader. The results of the Second World

War, the role of the USSR in supporting the anti-colonial movement, the involvement of the BOP, and other factors combined to produce the desired result. In fact, this is a typical example of the EFF formula. However, the increased complexity of the specific process of sovereignization does not mean that its general model will not be reproduced over and over again.

The political leader effect is fraught with surprises for a hegemon country, even in a relatively favorable situation for it. An example of this is the last Shah of Iran, Mohammad Reza Pahlavi, who was a U.S. protégé. Despite the Shah's loyalty to American politics, in the 1970s, in the wake of rising oil prices, he began a large-scale modernization of the country, which was not part of the plans of the American establishment. And although the policy undertaken by the Shah turned out to be extremely ill-conceived and ineffective (Kapuschinsky, 2007), the United States perceived the actions of the Iranian leader as extremely undesirable and refused to help him when massive anti-government protests broke out in the country. In this case, it is clear how

an individual ruler, even as a protégé of a hegemon country, can suddenly get out of control and start undesirable actions. Today, Turkish leader Recep Tayyip Erdoğan is carrying out similar geopolitical maneuvers, alternately changing the vector of the country's development from pro-American to anti-American.

The most telling example of the political leader effect is the case of Russian President Vladimir Putin, who came to power in 2000 and was supporting a comprador policy for a long time. His attempts to include Russia in the European Union and then in NATO testified to his complete loyalty to Western attitudes. Nevertheless, after 2014, Vladimir Putin's actions deranged the plans of the American establishment (Ekimova, 2024b); According to former U.S. President George W. Bush, the American administration expected that "Russia would be more compliant. But then Putin changed dramatically"<sup>9</sup>. Of course, such a large-scale turn in national politics is not made by a single person, but the role of the country's supreme leader at such moments is enormous. And such seemingly spontaneous actions are precisely what predetermines a country's exit from the neocolonial trap.

5. *Economic patriotism*. In some cases, the geopolitical confrontation of countries, including sanctions and protectionism, can cause passionate movements not only in the elites, but also in the population. Today, the concept of *economic patriotism* is already becoming widespread, which implies an outburst of patriotic and quasi-patriotic feelings among the peoples of the countries experiencing pressure from the hegemon country, including in the form of economic sanctions. Such sentiments form an additional potential for inter-ethnic harmony (Karnyshev et al., 2017). A typical example of this kind of process is the growth of

<sup>9</sup> See: <https://ren.tv/news/v-rossii/977084-vovan-i-leksus-pokazali-prank-s-bushem-na-forume-novye-gorizonty>

domestic tourism in Russia as a response to the closure of many Western countries for Russian citizens. Similar processes can spread to different markets and contribute to the castling of forces in favor of neocolonial States.

Recent studies of the impact of U.S. economic coercion measures such as trade tariffs, financial penalties, export control and international sanctions show that they are transforming global politics and economics toward reducing the influence of American hegemony; States and companies are looking for ways to circumvent restrictions, governments of countries under restrictions are forming alliances; China and Russia form an alternative center of gravity in the world (Demarais, 2024). A typical example of this kind of consolidation of the internal forces of a country under pressure from the United States is, according to the Russia Public Opinion Research Center (VCIOM), an increase in the proportion of Russians who consider themselves patriots of Russia from 80 to 94% in 2016–2024; according to the Public Opinion Foundation (FOM), the proportion of Russians who approve of the way that the Russian President is handling his job increased from 61 to 78% in 2021–2024 (Ekimova, 2024a). Thus, the pressure of the hegemon country leads to increased resistance from the dependent countries.

#### **Expanded model of a country's success in the context of neocolonialism**

As already mentioned, in the context of neocolonialism, most States are characterized by a discrepancy between the de jure and de facto statuses. And this fact cannot be ignored, although traditional economic theories and doctrines of the West carefully conceal it. For example, today we should consider an expanded formula for the success of a State:

$$\left( \frac{\text{Success of the country}}{\text{Total outcome (synergistic effect)}} \right) = \left( \frac{\text{People's welfare}}{\text{Internal situation (social effect)}} \right) + \left( \frac{\text{Sovereignty of the State}}{\text{External situation (political effect)}} \right). \quad (3)$$

At first glance, this formula is trivial and self-evident, but this is not entirely true. The fact is that conventional economic concepts use a truncated formula, when the addend in the right-hand side (3) is missing (by definition, the addend is the same for all, and therefore it is ignored), and this logic produces completely different mental and ideological attitudes. To illustrate the analytical manipulation of this formula, let us consider the example of South Korea and North Korea.

If we take a one-factor formula (3), where there is no effect of state sovereignty, then the per capita GDP indicator, which acts as a fully adequate measure of the welfare of the country's population, is much higher for South Korea than for North Korea; in general, the internal situation can be assessed by a vector of different indicators with their subsequent aggregation, which does not change the very logic of formula (3). This leads to the conclusion that South Korea has achieved more significant success in social and economic development. If necessary, this conclusion is sometimes supported by a kind of geopolitical trolling – a snapshot of the night map of the Korean Peninsula obtained from space is published; the photo contrasts the southern part flooded with light and the northern part immersed in darkness (Acemoğlu, Robinson, 2015, p. 101). Such analytical and factual passages are intended to substantiate a simple conclusion: a country with a democratic regime of government (South Korea) is capable of achieving impressive development results, and a country with an authoritarian regime (North Korea) cannot claim a worthy place in modern civilization. Other consequences follow almost automatically: the North Korean government is ruining its population, pursuing an aggressive foreign policy and acting as one of the representatives of the global “axis of evil”.

However, if we consider an extended formula for success (3), the situation becomes radically different. Granted, South Korea has a higher standard of living and consumption than North

Korea, but it is a puppet regime of the United States, which has deployed its military bases on its territory and uses the country as a bargaining chip in its strategic interests against North Korea. And no amount of protests against the current situation on the part of South Korea can change anything, although the struggle of the South Korean elites for liberation from American dictate is ongoing. Against this background, North Korea has developed its own nuclear technology, created an impressive military-industrial complex, joined the nuclear club, defended its political sovereignty, and inspires outright fear in the neighboring Japan and the United States itself. With this interpretation of events, balance (3) no longer allows us to talk about the total advantage of South Korea; rather, the opposite is true – the advantages are on the side of North Korea.

Earlier, Pakistan became a nuclear power, and now Iran is close to achieving this goal. And all these countries have made great sacrifices on the altar of their sovereignty – North Korea and Iran have been subjected to large-scale international economic sanctions, and the people of Pakistan have already paid in full for the success of their State. To understand the drama of the political choice that these countries had to make, it is enough to recall the words of Pakistani Prime Minister Zulfikar Ali Bhutto: “Pakistan will eat grass or leaves, even suffer from hunger, but will create a nuclear bomb”<sup>10</sup>. It cannot be otherwise – a country's political sovereignty requires social sacrifices, but these sacrifices are not in vain and must be taken into account in the overall balance of national achievements. We agree with S. Karaganov and co-authors who point out that today there is “convergence between economy and security” (Trenin et al., 2024, p. 103); this thesis is the basis for structural equation (3).

<sup>10</sup> See: Guskova A. How Pakistan became a nuclear power. Available at: <https://warspot.ru/3251-kak-pakistan-stal-yadernoy-derzhavoy?ysclid=lyzyg89ngs800801171>



We should emphasize that such social costs do not proceed from the political recklessness of the ambitious rulers of these countries. The fact is that formula (3) takes into account not only short-term, but also long-term effects. In the short term ignoring the factor of a country's sovereignty can give a positive result, while in the long term it is almost impossible. This pattern is due to the fact that the effectiveness of managing internal processes in a country directly depends on the government's freedom to make appropriate decisions. External interference from the hegemon country, as a rule, eliminates many effective domestic policy options.

It is noteworthy that already during the period of his famous reforms, Chinese leader Deng Xiaoping formulated three conditions for their justification: ensuring the growth of production; improving the standard of living; increasing the total power of the State (Ovchinnikov, 2021, p. 19). It is easy to see that the first two conditions "cover" the first term on the right side of formula (3), and the third condition covers the second term. Thus, already in the second half of the 20th century, the Chinese leadership clearly acted in accordance with expanded model (3).

Thus, structural balance (3) sets a new analytical framework for the study of geopolitical and economic processes. At the same time, the verification of both components of the right-hand side (3) is not very difficult. Even the second component involves calculating a specially designed index of a country's sovereignty, which, for example, can take values from 0 to 1. Paradoxically, the ability of a country to launch an armed conflict with another country is a sign of its sovereignty; otherwise, such decisions are made by the hegemon country.

From an instrumental point of view, structural balance (3) is written in an additive form, although it can also be represented in a multiplicative form (by multiplying the two components of the right-hand side (3)). This does not change the essence of the phenomena under consideration.

### **Machiavelli's militaristic model: A revised definition**

It is interesting that model (3) was considered in a slightly different form in N. Machiavelli's classic work *The Prince*, which contains Chapter X "Concerning the way in which the strength of all principalities ought to be measured". In this chapter the author says: "It is necessary to consider another point in examining the character of these principalities: that is, whether a prince has such power that, in case of need, he can support himself with his own resources, or whether he has always need of the assistance of others" (Machiavelli, 2018, p. 62). Further, in Chapter XII, he actually gives a ready-made formula for the success of a country: "The chief foundations of all states ... are good laws and good arms; and as there cannot be good laws where the state is not well armed, it follows that where they are well armed they have good laws" (Machiavelli, 2018, p. 66):

$$\frac{\text{(Success of the country)}}{\text{Total outcome}} = \frac{\text{(Just laws)}}{\text{Internal situation}} + \frac{\text{(Strong army)}}{\text{External situation}} \cdot (4)$$

It is easy to see the almost complete identity of structural models (3) and (4), which allows us to consider Machiavelli as one of the predecessors of model (3).

Speaking of a good army, Machiavelli means the State's own armed forces, categorically excluding not only the auxiliaries, but also the mercenaries. According to Machiavelli, the auxiliaries are useless, because their defeat threatens the death of those who called them to help, and their victory means dependence on them (Machiavelli, 2018, p. 70). The systems defect of a mercenary army is produced by the following principle: why do you need money if you get killed? In this regard, Machiavelli gives a harsh verdict: "Mercenaries are famous for advancing slowly and sluggishly, but retreating with remarkable speed" (Machiavelli, 2018, p. 69). Developing this idea further, the author believes that in addition to decent pay for the military, the condition

of their vital interest in the outcome of the battle must be met, and this is achieved by the valor and dedication of their fellow citizens who have become warriors (Machiavelli, 2018, p. 73). Based on these considerations, we can write another structural equation in the development of equation (4):

$$\underbrace{\left(\text{Strong army}\right)}_{\text{Total outcome}} = \underbrace{\left(\text{Decent payment}\right)}_{\text{Material factor}} + \underbrace{\left(\text{Civic patriotism}\right)}_{\text{Moral factor}}. \quad (5)$$

Consequently, equation (5), on the one hand, reveals and details equation (4), and on the other hand, it has the same architecture as equations (3) and (4). In fact, there are two multilevel components in the right-hand sides of all three equations – the lowest, represented by the first component, and the highest, represented by the second component. At the same time, paradoxically, higher matters (political sovereignty of the country, its armed forces and the patriotism of the latter) are prerequisites for the effective implementation of the basic foundations of the State (welfare and patriotism of the population).

Equations (4) and (5) are the essence of Machiavelli's militaristic model. Here, as in the case of model (3), equivalent versions of formulas (4) and (5) in multiplicative form are possible.

Little has changed since Machiavelli's time. For example, the United States, as an ally of the USSR in World War II, took control of half of Europe, including half of Germany, all of Japan and half of Korea, and then became the general rival of the Soviet Union in the Third World War (Cold War). Accordingly, Germany and Japan are still formally prohibited from having their own armed forces, and U.S. allies that have U.S. military bases on their territory actually use the allied army of the hegemon country. And in almost all of these countries the situation is developing according to the scenarios described by Machiavelli: either the United States fully controls the strategic aspects of the existence of

the allied countries, or in the event of an unfavorable set of circumstances, they abandon their colonies to their fate. At the same time, the external welfare of the allied countries can successfully mask their political independence until the onset of critical events in their history. The political establishment of the dependent countries is gradually becoming aware of these simple truths and is now intensifying the struggle for sovereignty.

### Conclusion

Today, the world is facing another neocolonial cycle. It is difficult to say who depends more on whom today – China on the United States or the United States on China. This is a starting point for another colonial castling. At the same time, Russia's role on the Eurasian continent is increasing. Iran is "ready to jump", which could be followed by a powerful surge. India is ahead of China in terms of dynamism. All these events are capable of depriving the United States of hegemony, and in the long run, turning it into a quasi-sovereign country dependent on global resource markets that are under the control of other countries. However, no matter what, the general vector of geopolitical shifts has been determined – a new colonial cycle is being formed. It is possible that European countries will become part of the new colonies, and Russia and China will be above them as hegemon States.

The above picture of tectonic shifts in the geopolitical system does not fit into the cognitive framework of traditional economic and political theories. Under these conditions, the significance of an adequate picture of the world is increasing more than ever before. The most important notion in the concept of colonial cycles proposed above is political sovereignty. Without taking this factor into account, most modern processes in the global economic system do not receive a relevant description and assessment. Conversely, taking this circumstance into consideration can be the first step in building updated social knowledge.

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