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## **BIOFACTORS OF WATER SUSTAINABILITY AND THEORY OF WATER SELF-PURIFICATION CREATED AT MSU: IDENTIFICATION OF 17 KEY FUNCTIONAL ROLES OF BIOTIC FACTORS**

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### **ABSTRACT**

A series of MSU research articles and books was published, in which the author created an innovative conceptualization of data on ecosystem-driven water self-purification. As a part of this ecological theory, the author identified a number of biotic and abiotic factors which play key roles in functioning of a complex of mechanisms involved in water self-purification. Vital elements of this theory are presented in this article and 17 key roles of biotic factors are identified. Also, attention is given to the use of this ecological theory and mention of publications on this theory by several other institutions. This theory of water self-purification is instrumental to achieving sustainable use of water resources.

**Keywords:** ecosystem function, biological factors, water self-purification, role of biota, aquatic ecosystems, pollution control, water quality, filter-feeders, aquatic plants.

### **Background**

Relevant issues of aquatic environmental science and ecology, especially those that are relevant to water quality, were studied in publications of a number of ecologists and biologists (e.g., [1-27, 30-51], and many others).

In a series of previous publications, we originated and presented an innovative theory of ecosystem-performed improvement of water quality (water self-purification) (e.g., [12, 16, 19, 21, 22, 30-33, 36-44], and other articles).

In the modern biosphere and hydrosphere, the role and relevance of water self-purification is increasing due to the current anthropogenic deterioration of natural water quality [5, 13, 29] and increased load of pollutants and nutrients on water bodies and streams [4, 9, 13, 21, 22, 26, 29]. The self-purification of aquatic ecosystems and water quality formation is controlled and/or influenced by many factors and processes [1-3, 6-13, 15-19, 21, 22, 24, 33, 35, 36-44].

### **Goal**

The objective of this work is to contribute to putting into system the modern knowledge about the polyfunctional (multifunctional) role of aquatic biota (aquatic animals, plants, microorganisms) in the self-purification of water bodies and streams and to briefly present some elements of the qualitative theory of the self-purification mechanism of aquatic ecosystems. The synthesis and organization of the material was made here at the conceptual level on the basis of some previous publications (e.g., [36-44], and others), without detailed reviewing of all relevant and related publications.

### **Some major factors and processes that contribute to water self-purification in aquatic ecosystems.**

Water quality and water self-purification depend on many factors and involve a multitude of interconnected processes. As we underlined before, the formation of water quality and its purification in aquatic ecosystems is governed by physical, chemical [24], and biological (biotic) [1–3, 6–13, 15–19, 21, 22, 24, 33, 35, 36–44] processes (Table 1). The physical and chemical processes of water self-purification are often controlled by biological factors or are strongly dependent on them.

For instance, the redox state of the aquatic environment, which forms with the participation of hydrogen peroxide ( $H_2O_2$ ) released by microalgae in the light [22, 24], is of importance for a decrease in the toxic effect of some pollutants. The amount of hydrogen peroxide ( $H_2O_2$ ) released into the aquatic environment was estimated at  $10^{-5}$  mol/(l day).

The concentration of hydrogen peroxide ( $H_2O_2$ ) in the Volga River was found to equal up to  $10^{-6}$ – $10^{-5}$  mol/l, which was supported by measurements made by Dr. E.V. Shtamm and other authors [22, 24].

An important process is gravitational sedimentation of suspended particles both of biotic and abiotic nature. The number, size, and sedimentation velocity of biogenic particles strongly depend on populations and activity of many aquatic biological organisms. The phytoplankton sedimentation depends on water temperature  $T$ . It is equal to 0.3–1.5, 0.4–1.7, and 0.4–2.0 m/day at  $T = 15, 20,$  and  $25^\circ C$ , respectively.

According to our data, the sedimentation velocity of the pellets produced by the giant pond snail (*Lymnaea stagnalis*) varies from 0.6 to 1.4 cm/s with a mean value of 0.82 cm/s (at  $T = 22$ – $24^\circ C$ ) [22].

Experiments with traps for suspended particles showed that suspended matter precipitates onto the bed of the Moskva River with a mean rate of 2.3 mg per  $1\text{ cm}^2$  of the bed surface per day, that is, 23.1 g per  $1\text{ m}^2$  of the bed surface per day; the proportion of  $C_{org}$  (organic carbon) in these sediments is 64.5% [34].

Organic matter oxidation and water filtration by aquatic organisms are among the biotic processes contributing to water purification.

The overall oxidation of organic matter by the entire community can be expressed either in absolute or in relative units, for example, as the ratio of energy expenditure to the exchange (total respiration  $R$ ) by aquatic organisms to their total biomass  $B$ . This ratio  $(R/B)_e$  is referred to as Schrödinger ratio. The subscript “e” is introduced to show that the estimation is made for the ecosystem. In the water bodies where, primary production exceeds the total respiration of the community, this ratio averages 2.99–6.1 [2], but it can be even greater in some water bodies.

For example, the Schrödinger ratio is 17.0 in Lake Lyubevoe in Leningrad province and 33.8 in Lake Zun-Torei east of Lake Baikal [2]. It is believed that the primary production in these lakes is much less than the total respiration and a large amount of organic matter delivered from outside is oxidized here.

Many aquatic organisms contribute to organic matter oxidation, but role in this oxidation belongs to bacteria [19]. The total population of heterotrophic bacterioplankton in the Mozhaik Reservoir (central European part of Russia, Moscow Region) in summer (June and July) amounted to  $(1.36$ – $5.9) \times 10^9$  (the samples of water were taken at a depth of 0.1–1 m), and the population of hydrocarbon-oxidizing bacteria was  $(0.4$ – $5) \times 10^6$  cell/ml [7].

The rates of water filtration by some aquatic invertebrate animals (including bivalve mollusks, barnacles, ascidians (subphylum Tunicata), Polychaeta, sponges Porifera, echinoderms, and other groups of filter - feeders (suspension feeders) commonly amount to 1–9 l/h per 1 g of de-ashed dry mass (AFDM, ash-free dry mass) of their body [21, 22].

The dependence of filtration rate FR (units: l/h), on the mass of the aquatic animal dry weight (units: g), can be described by the power function [1, 22]:

$$FR = aDW^b,$$

where DW is the dry weight of soft tissues (units: g).

The values of coefficient for some mollusk species vary from 6.8 to 11.6, and the value of coefficient b is between 0.66 and 0.92 [22].

The rate of water filtration by five mollusk species converted to the area of their gills is about 1.2–1.9 ml/min per 1 cm<sup>2</sup> [22]. The total rate of water filtration by populations of macroinvertebrates (mollusks, polychaetas, and others) was estimated at 1–10 m<sup>3</sup> per 1 m<sup>2</sup> of the bottom of the aquatic ecosystem per 1 day [13, 22].

Additional data on the filtration activity of aquatic invertebrate animals is given in Tables 2 and 3 in another paper (published by the author in the journal “Water Resources”).

It is useful to summarize and put into a system the current knowledge on a diversity of factors and processes involved in water self-purification in aquatic ecosystems in the form of three groups of factors:

(1) on physical and physico-chemical factors; (2) on chemical factors.

(3) on biological factors.

It is interesting that when we analyzed all 3 groups of these factors, we observed that the first two groups of factors depend on biological factors.

Here we present the result which we got when we presented the most important biological factors in the form of an original table. The resulting table is given below.

This table summarizes several biological factors, processes, and phenomena.

**Table 1.** The author proposes to consider these biological factors and processes that are relevant and contribute to water self-purification. This is an original table, it is based on our previous publications [13, 22, 36-44], and also on some other publications, as well as many publications and materials of other authors, including papers or files published online.

| Biological factors  | Comments  |
|---|---|
| 1.Release of O <sub>2</sub> from higher plants, algae and cyanobacteria; the oxygen takes part in many reactions of pollutant oxidation | O <sub>2</sub> release into water takes place during photosynthesis |
| 2.Sorption and accumulation of pollutants and nutrients by aquatic animals  | Depends on the populations and activity of aquatic animals          |
| 3.Biotransformation (redox–reactions, destruction, conjugation)   | The same as above   |
| 4.Extracellular enzymatic transformation of pollutants.   | Depends on the populations and activity of aquatic organisms        |

|  |  |
|--|--|
| 5. Removal of suspended particles and pollutants from water column as a result of water filtration by aquatic animals.   | Is inhibited under the effect of some pollutants (according to the author's data: surfactants, synthetic detergents) [33]  |
| 6. Removal of pollutants from water as a result of sorption by pellets excreted by aquatic animals   | Pellet formation is reduced when feeding of aquatic animals is inhibited, as it was shown by the author  |
| 7. Release into water of organic matter, which can be used by bacteria or exert a regulatory effect on them  | Algae can release organic molecules that might be used by bacteria as substrates for oxidation. Cyanobacteria can produce vitamins useful to bacteria. Some aquatic organisms can produce chemical inhibitors. |
| 8. Organic matter release by phytoplankton was recorded.   | Higher aquatic plants also release exometabolites  |
| 9. Release into water of organic matter that serves as a photosensitizer of pollutant  | Depends on the population and functional activity of aquatic organisms   |
| photolysis or predecessors of photosensitizers   |  |
| 10. Release into water of organic matter (or predecessors of such matter), which will bind with pollutants with the formation of less toxic complexes                              | The same as above  |
| 11. Release into water of organic matter (or predecessors of such matter), which participate in free-radical and redox-catalytic mechanisms of pollutant destruction               | The same as above  |
| 12. Microalgae release hydrogen peroxide to water.   | hydrogen peroxide may influence chemical reactions and processes in water  |
| 13. Release into water of vitamins, which are necessary for the vital activity of some aquatic organisms which participate in self-purification of aquatic ecosystems              | Water of lakes and pools contains, µg/l: vitamin B12 (0.001–0.85), thiamine (0.001– 12), biotin (0.0001–0.1), niacin (up to 3.3), pantothenic acid (up to 0.26), and others vitamins [35]                      |
| 14. Removal or inactivation of some of bacteria, including pathogenic strains  | Takes place at filtration activity of aquatic animals. Inactivation can take place under the effect of metabolites of aquatic organisms.   |
| 15. Prevention or slow-down of the release of nutrients and pollutants from bottom sediments into water; accumulation and binding of nutrients and pollutants by benthic organisms | Depends on populations and functional activity of organisms of benthos.  |
| 16. Biotransformation and sorption of pollutants in soil during soil watering by wastewaters   | Depends on soil biocenoses (soil biological communities).  |
| 17. Regulation of the populations and activity of organisms which participate in the processes of water self-purification as a result of organism-to-organism interaction          | Depends on the preservation of intact community.   |

We included in this table the list of 17 items. This list needs further structurizations. We tried to make a shorter list of a few main types of functional mechanisms which covers the abovementioned huge variety of biological factors (and processes) involved in water self-purification. As a result, we formulated a new shorter list that contains 4 items. It is presented in the next part of this article.



### **Identification of the major components of the complex of self-purification mechanisms in ecosystems of water bodies and streams.**

The complex of hydrobiological and ecological self-purification mechanisms of aquatic ecosystems incorporates, according to the author of this paper, four types of mechanisms [21, 22, 36-44]:

Type 1: Filters. Filters are vital functional components of the machinery for water self-purification; filtration activity of organisms (“filters”) [30];

Type 2: Pumps. Pumps are functional components of the machinery for ecosystem-driven water self-purification; the mechanisms of transfer of chemicals from one ecological compartment into another (from one medium into another);

Type 3: Mills. Mills are among functional components of the ecosystem-driven machinery for water self-purification; mills are splitting pollutant molecules.

Type 4: Sorbents. They are functional components of the machinery for water self-purification; their function is sorption of ecotoxicants, pollutants on biogenic sorbents – on both biomass and non-alive biogenic material.

### **Response of the international scientific community to the abovementioned ecological theory: examples of use and citation.**

The publications that formulated and presented the abovementioned theory of ecosystem-driven water self-purification got a use and favorable citation in scientific literature (e.g., [55-57, 60-64], and many others).

Here some examples of who used and cited the paper [37], namely: Ostroumov, S.A., (2010). Biocontrol of water quality: Multifunctional role of biota in water self-purification. *Russ J Gen Chem*, V. 80, pp. 2754–2761. (DOI: <https://doi.org/10.1134/S1070363210130086>; <https://www.academia.edu/1892485/>).

Several examples (selected) of citation of this article are given below. It was cited in papers [60-64]:

Rossi, D., Romano, E., Guyennon, N., Rainaldi, M., Ghergo, S., Mecali, A., Parrone, D., Taviani, S., Scala, A. and Perugini, E., 2019. The present state of Lake Bracciano: hope and despair. *Rendiconti Lincei. Scienze Fisiche e Naturali*, 30, pp.83-91.

Yao, J., Sánchez-Pérez, J.M., Sauvage, S., Teissier, S., Attard, E., Lauga, B., Duran, R., Julien, F., Bernard-Jannin, L., Ramburn, H. and Gerino, M., 2017. Biodiversity and ecosystem purification service in an alluvial wetland. *Ecological Engineering*, 103, pp.359-371.

Parszuto, K., Lopata, M., Grochowska, J., Tandyrak, R. and Augustyniak, R., 2020. Support of the Self-purification Processes in Lakes Restored in Poland. *Polish River Basins and Lakes–Part II: Biological Status and Water Management*, pp.353-371.

Yang, J., Li, T., Feng, T., Yu, Q., Su, W., Zhou, R., Li, X. and Li, H., 2021. Water volume influences antibiotic resistomes and microbiomes during fish corpse decomposition. *Science of The Total Environment*, 789, p.147977.

Han, T., Zhang, H., Hu, W., Deng, J., Li, Q. and Zhu, G., 2015. Research on self-purification capacity of Lake Taihu. *Environmental Science and Pollution Research*, 22, pp.8201-8215.

Affiliations of the authors who cited, selected examples are given below.

**Table 2.** Use and mention of the publication that formed the theory of ecosystem-driven water self-purification (namely, the paper: Biocontrol of water quality: Multifunctional role of biota in

water self-purification. <https://www.academia.edu/1892485/>; and other closely related publications by the same author).

|   |  |
|---|--|
| Who cited, the references: these papers cited the article that presented the theory of water self-purification, namely:<br>Who cited the article titled: Biocontrol of water quality: Multifunctional role of biota in water self-purification. <a href="https://www.academia.edu/1892485/">https://www.academia.edu/1892485/</a> ; | Countries and institutions whose scientists made these citations (the affiliations of the scientists who cited).   |
| Rossi, D., Romano, E., Guyennon, N., Rainaldi, M., Ghergo, S., Mecali, A., Parrone, D., Taviani, S., Scala, A. and Perugini, E., 2019. The present state of Lake Bracciano: hope and despair. <i>Rendiconti Lincei. Scienze Fisiche e Naturali</i> , 30, pp.83-91.  | Affiliations:<br>David Rossi, Emanuele Romano, Nicolas Guyennon, Martina Rainaldi, Stefano Ghergo, Alessandro Mecali, Daniele Parrone : CNR-Water Research Institute, Research Area RM1, Monterotondo, Italy;<br>Sara Taviani: DISAT-Department of Earth and Environmental Sciences, University of Milano-Bicocca, Milan, Italy;<br>Antonio Scala: CNR-Institute for Complex Systems, Rome, Italy;<br>Emanuele Perugini: Bracciano Smart Lake, Bracciano, Italy; |
| The paper that cited it: Yao, J., Sánchez-Pérez, J.M., Sauvage, S., Teissier, S., Attard, E., Lauga, B., Duran, R., Julien, F., Bernard-Jannin, L., Ramburn, H. and Gerino, M., 2017. Biodiversity and ecosystem purification service in an alluvial wetland. <i>Ecological Engineering</i> , 103, pp.359-371.                      | 1. ECOLAB, Université de Toulouse, CNRS, INPT, UPS, Toulouse, France;<br>2. EEM, UMR IPREM 5254, Université de Pau et des Pays de l'Adour, IBEAS, F- 64013 Pau, France;  |
| Another paper that cited it: Parszuto, K., Lopata, M., Grochowska, J., Tandyrak, R. and Augustyniak, R., 2020. Support of the Self-purification Processes in Lakes Restored in Poland. <i>Polish River Basins and Lakes–Part II: Biological Status and Water Management</i> , pp.353-371.   | Affiliation of the authors: Department of Environmental Protection Engineering, Faculty of Environmental Sciences, University of Warmia and Mazury in Olsztyn, Olsztyn, Poland;  |

Some additional examples of use and mention of publications which formulated this innovative theory of water self-purification are provided in Table 3 below.

**Table 3.** Use and mention of the publications that formed the theory of ecosystem-driven water self-purification ([36, 38, 39] and other closely related publications by the same author).

| Who cited, the references: these papers cited the publications that presented the theory of water self-purification   | Institutions whose scientists made these citations.   | Countries     |
|---|---|---------------|
| Lynch et al., 2023 [55], cited [38], the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. <i>Rivista Di Biologia /Biology Forum</i> , 97, 39–50. | 1. U.S. Geological Survey, National Climate Adaptation Science Center, Reston, Virginia, USA; | United States |

|   |   |               |
|---|---|---------------|
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 2. Institute of Environmental and Interdisciplinary Science and Department of Biology, Carleton University, Ottawa, Canada; | Canada        |
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 3. Australian Rivers Institute, Griffith University, Nathan, Australia;   | Australia     |
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 4. Institute of Environmental Research and Engineering, National University of San Martin, San Martín, Argentina;           | Argentina     |
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 5. iES Landau, Institute for Environmental Sciences, University of Koblenz-Landau, Landau, Germany;                         | Germany       |
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 6. International Water Management Institute, Colombo, Sri Lanka;  | Sri Lanka     |
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 7. Conservation International, Arlington, Virginia, USA;  | United States |
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 8. Free-Flowing Rivers Lab, School of Earth & Sustainability, Northern Arizona University, Flagstaff, Arizona, USA;         | United States |
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 9. Tanzania Fisheries Research Institute (TAFIRI), Dar es Salaam, Tanzania;   | Tanzania;     |
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 10. Department of Chemistry and Bioscience, Aalborg University, Aalborg, Denmark;   | Denmark       |
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 11. Daniel P. Haerther Center for Conservation and Research, John G. Shedd Aquarium, Chicago, Illinois, USA;                | United States |
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 12. School of Aquatic and Fishery Sciences, University of Washington, Seattle, Washington, USA;                             | United States |
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 13. Department of Wildlife, Fish & Environmental Studies, Swedish University of Agricultural Sciences, Umeå, Sweden;        | Sweden        |

|   |   |                |
|---|---|----------------|
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 14. Water Research Institute, Cardiff School of Biosciences, Cardiff, U.K.;   | United Kingdom |
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 15. Freshwater Biological Association, The Ferry Landing, Cumbria, U.K.;  | United Kingdom |
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 16. Wyss Academy for Nature at the University of Bern, Bern, Switzerland;   | Switzerland    |
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 17. Institute of Ecology and Evolution, University of Bern, Bern, Switzerland;  | Switzerland    |
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| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 19. Department of Fisheries Resource Management, Kerala University of Fisheries and Ocean Studies (KUFOS), Kochi, India;  | India          |
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 20. Department of Conservation Ecology and Entomology, Stellenbosch University, Matieland, South Africa;  | South Africa   |
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 21. Department of Landscape, Spatial and Infrastructure Sciences, Institute of Landscape Development, Recreation and Conservation Planning, University of Natural Resources and Life Sciences, Vienna, Austria; | Austria        |
| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum | 22. Aquatic Ecology Centre, School of Science, Kathmandu University, Dhulikhel, Nepal;  | Nepal          |
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| Lynch et al., 2023, cited the paper titled: Aquatic ecosystem as a bioreactor: Water purification and some other functions. Rivista Di Biologia / Biology Forum   | 25. South African Institute for Aquatic Biodiversity, Makhanda, South Africa;   | South Africa         |
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It is worth mentioning that the abovementioned theory of water self-purification and the publications that presented this theory were used cited by researchers who explored the ways to protect and improve water quality in regions and locations as diverse as several locations in Europe, North America, Asia, Africa, and some others. Specific examples are to be found in the tables above.

## Conclusions

1. This article provides an updated list of biological factors involved in water self- purification. This list is a part of the innovative theory of water self-purification formulated by the author. Other details of this theory are in the papers and books of the author, see the References.
2. This article contain information on publications of other authors who use and mention

(favorably) this theory and the author's research publications on this theory in their papers.

3. The abovementioned theory of water self-purification and the publications that presented this theory were used and cited by researchers who explored the ways to protect and improve water quality in regions and locations as diverse as several locations in Europe, North America, Asia, Africa, and some others.

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## COMPLEX OF MEASURES TO IMPROVE RISK MANAGEMENT MECHANISMS AT OIL ENGINEERING ENTERPRISES

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### ABSTRACT

The article reflects the need for risk management at oil engineering enterprises. Here the category of risk is considered as "probability of loss, threat".

The main risks affecting oil engineering enterprises, arising from both external and internal risk factors, are systematized. To analyze and assess industry risks, the factors for assessing the activities of enterprises are reflected in detail.

The article also discusses the causes of structural risks. For a more refined analysis, their main indicators are described. A model is also presented that allows you to determine the areas of influence more accurately on the efficiency of the enterprise.

In conclusion, a conclusion is made about integrated risk management, which will precisely allow us to resist negative impacts, ensuring the sustainability of this sub-sector.

**Keywords:** oil engineering enterprises, innovative development, risks, capital, non-oil industry enterprises, financial indicators.

### XÜLASƏ

Məqalədə neft maşınqayırma müəssisələrində risklərin idarə edilməsinə ehtiyac öz əksini tapıb. Burada risk kateqoriyasına "itki ehtimalı, təhlükə" kimi baxılır.

Neft maşınqayırma müəssisələrinə təsir edən həm xarici, həm də daxili risk faktorlarından yaranan əsas risklər sistemləşdirilir. Sənaye risklərinin təhlili və qiymətləndirilməsi üçün müəssisələrin fəaliyyətinin qiymətləndirilməsi amilləri ətraflı şəkildə əks etdirilir.

Məqalədə həmçinin struktur risklərinin səbəblərindən bəhs edilir. Daha dəqiq təhlil üçün onların əsas göstəriciləri təsvir edilmişdir. Müəssisənin səmərəliliyinə təsir sahələrini daha dəqiq müəyyən etməyə imkan verən bir model də təqdim olunur.

Yekun olaraq, bu alt sektorun davamlılığını təmin edərək, mənfi təsirlərə qarşı dəqiq müqavimət göstərməyə imkan verəcək inteqrasiya olunmuş risklərin idarə edilməsi haqqında nəticə çıxarılır.

**Açar sözlər:** neft maşınqayırma müəssisələri, innovativ inkişaf, risklər, kapital, qeyri-neft müəssisələri, maliyyə göstəriciləri.

In the modern era of globalization, the basis for the economic development of our country is the elimination of dependence on hydrocarbon resources, including the modernization of non-oil enterprises, their reconstruction and management in accordance with market requirements.

Based on this need, the President of the Republic of Azerbaijan, Mr. Ilham Aliyev, declared 2014 the Year of Industry. This historic order states: "At the present stage, taking into account modern trends and new initiatives, a number of measures are being taken to modernize the industry and diversify the non-oil industry, including with the involvement of available natural and economic resources in the economic cycle, along with traditional industries, it is important to create new

priority industries, industrial parks, strengthening the industrial potential in the regions, creating opportunities that will ensure the development of the industry based on innovation” [8].

However, all new measures implemented for the innovative development of enterprises in the non-oil industry lead to the creation of complex risks in the industry. This makes it relevant to consider, evaluate and effectively manage risk factors that hinder the economic development of the field and, at the same time, the development of new business projects in the industry. Because success in the field depends on the correctness and importance of the chosen strategy, and at the same time on the assessment and effective management of risks that are of particular importance in the economic development of the industry [3].

To this end, in recent years, “The State Program for the Social and Economic Development of the Regions of the Republic of Azerbaijan for 2019-2023” have been adopted.”, “Azerbaijan- 2025, 2030: a look into the future”, the development concepts and the “Strategic roadmap for the prospects of the national economy of the Republic of Azerbaijan” were adopted. The main goal of these programs and concepts is to minimize our country's dependence on the oil factor in the context of globalization, achieve rapid development of the non-oil sector, including the non-oil industry, increase the efficiency and competitiveness of industry and ensure its innovative development [9].

All areas of economic activity develop under the influence of risk factors and become a competitive area. In this sense, the impact of risk plays a special role in the development of the industrial sector of our country, including non-oil industry enterprises. In other words, all production and economic activities of non-oil industry enterprises do not like the uncertainty of the future [4].

In general, the greater the risk, the greater or lesser the return. Market relations in the field of financing follow this principle. Thus, as a rule, risk arises in conditions of uncertainty. According to this concept, risk is associated with uncertain events that will result in loss.

Risk is viewed as damage that can be measured by quantitative analysis and is evaluated as the occurrence of negative events. Its presence leads to incompleteness of the expected result. That is, the probability of expected loss dictates that the realization of pre-prepared assumptions can occur with errors.

Determining the main directions of effective management of risks arising in non-oil industry enterprises of our country, including oil machinery industry enterprises, and putting forward relevant proposals are urgent issues [4].

For this purpose, to determine the competitive economic development of non-oil industry enterprises, indicators reflecting the opinions of enterprise managers (experts) were reviewed (based on their request). In this case, the following main financial indicators of the enterprise were selected [7]:

1. Ratio of net working capital ( $X1 = (\text{aktiv assets})/(\text{assets})$ ) to assets. This indicator allows to evaluate the efficiency of using the company's assets.
2. Ratio of profit ( $X2 = (\text{net profit})/(\text{assets})$ ) to assets (first calculation option). This ratio shows the ability of a non-oil industry enterprise to use its assets to generate net profit.
3. Ratio of profit to assets (second calculation option) ( $X3 = (\text{balance profit})/(\text{asset})$ ). If there is a difference in the capital structure of the comparable enterprise, the ratio of income to assets "X2" can distort the value of the current situation. The main reason for this is that the higher the amount of interest paid by the enterprise on borrowed funds, the lower the amount of taxable income will

be. Therefore, the X3 indicator is used to "cleanse" the enterprise of differences in capital structure.

4. Ratio of profit to company's equity:  $X4=(\text{net profit})/(\text{company's equity})$ . This indicator characterizes the efficiency of the enterprise's investments in its own capital.

5. Asset turnover ratio ( $X5=(\text{sales revenue})/(\text{assets})$ ). The coefficient characterizes the efficiency of production. That is, how many products can be produced and realized with the available and involved means? (the ability of a set of defined assets to create the realization of goods) answers the question.

6. Ratio of balance profit to total capital ( $X6=(\text{balance profit}) / (\text{volume capital of the enterprise})$ ). This indicator characterizes the efficiency of all the capital invested in the specified enterprise.

7. Profit margin (difference) ( $X7=(\text{net profit})/(\text{sales revenue})$ ).

This indicator characterizes the ability to earn income from the entire volume of products sold in the enterprise. The larger the size of this indicator, the more profit shareholders can make.

8. Profit margin ( $X8=(\text{net profit})/(\text{costs})$ ). This indicator determines the availability of financial resources to increase the efficiency of all activities of the enterprise, its sustainability and competitiveness.

9. Financial instrument (coefficient) ( $X9=(\text{private funds})/(\text{debt funds})$ ). This ratio creates an idea about the structure of financing the economic activity of the enterprise.

10. Specific weight of the enterprise's private capital in assets ( $X10=(\text{private capital})/(\text{assets})$ ). This ratio shows that investing in the enterprise is dangerous.

11. Total payment ratio ( $X11=(\text{current assets})/(\text{current liabilities})$ ). This ratio shows the possibility of fulfilling the short-term obligations of the enterprise when all means of circulation are mobilized.

12. Use of working capital ( $X12=(\text{sales revenue}) / (\text{working capital})$ ). This indicator allows to assess the level of working capital utilization.

Based on the proposed indicators, the following correlation dependence (regression model) was determined between the financial indicators of the enterprises:

$$M=R1*X1+R4*X4+R5*X5+R7*X7+R8*X8, (1)$$

For simplicity, let us express the dependence (1) as follows:

$$\text{Here, } R1*X1=R1X1; R4*X4=R2X2; R5*X5=R3X3; R7*X7=R4X4;$$

$$R8*X8=R5X5 \text{ substitutions made.}$$

$$M=R1 X1+R2 X2+R3 X3+R4 X4+R5 X5, (2)$$

Here M- indicators of the enterprise's ability to fulfill its obligations (indicator reflecting the risk of bankruptcy);

$X_i (i=1..5)$  - financial indicators of the enterprise;

$R_i (i=1..5)$  are regression coefficients.

The indicator reflecting the company's bankruptcy risk shows its ability to fulfill its obligations. The company's ability to pay its obligations is determined by net current assets, that is, as the ratio of the volume of current assets to the sum of short-term and long-term liabilities.

- If  $M>1$  or  $M=1$ , the enterprise has the ability to fulfill its obligations;
- If  $0<M<1$ , the enterprise is likely to go bankrupt;
- If  $M<0$ , the enterprise is almost bankrupt.

If we substitute the results from the regression model in (2), model (2) looks like this:

$$M = 7.2 \cdot X1 + 0.9X2 + 0.06 \cdot X3 + 0.28X4 + 0.7 \cdot X5 (3)$$

According to formula (3), the following predictions can be made to reduce the risk of bankruptcy of the field:

- A 1% increase in the X1 indicator will lead to a 7.2% increase in the company's ability to fulfill its obligations;
- A 1% increase in the X2 indicator will lead to a 0.9% increase in the company's ability to fulfill its obligations;
- A 1% increase in the X3 indicator will lead to a 0.06% increase in the company's ability to fulfill its obligations;
- Does a 1% increase in the X4 indicator lead to a 0.28% increase in the company's ability to fulfill its obligations;
- A 1% increase in the X5 indicator will lead to a 0.7% increase in the company's ability to fulfill its obligations.

It gives reason to put forward the following proposals regarding the improvement of risk management mechanisms in processing industry enterprises:

The current production and economic activity of enterprises included in the processing industry, including oil and machine-building industry enterprises, is not satisfactory [1]. The main reasons are:

- lack of working capital; unsatisfactory financial performance; high level of receivables and payables; obsolescence of the range of released products, lack of potential sales markets; failure to develop a marketing strategy; inefficiency of organizational structures of enterprises that are not adapted to work in market economy conditions; lack of experience in searching for foreign partners and establishing partnership relations with them; organization of production, product quality, environmental protection, maintenance of social sphere objects, etc. The main reason for all these problems is explained by the presence of risk factors that hinder the production and export of many competitive industrial products. meets international standards [5].

Risks that hinder the innovative and competitive economic development of processing industry enterprises are classified as a group of economics, production, and other factors. This group of risk factors is also evaluated as basic and decisive, important, and less important. Among the economic risk factors, the focus was the lack of financial resources and the high cost of innovations, and among the production risk factors, the low innovation potential of enterprises, the lack of information about new technologies and sales markets were the main focus. Among other risk factors, the focus is the lack of progressive legislation and normative legal documents regulating and promoting innovation activities, lack of development of innovation infrastructure and technology base, etc [2].

The factor included in the group of economic risk factors and called "lack of own funds and financial assistance from the state" makes it necessary to attract both local and foreign investors to the field. However, in this case, the investor must determine the extent of the maximum possible loss for the risk that may arise in the field. That is, he should compare the extent of the loss with the amount of invested capital and own financial resources and should not determine that the loss of capital will result in bankruptcy. In the case of direct investments, as a rule, the amount of loss is equal to the amount of the enterprise's capital. However, considering inflation, his real losses may be less than the possible capital. In this case, the amount of damage is determined considering the inflation index. In portfolio investments, that is, when securities that can be resold in the market are purchased, the amount of loss is usually less than the amount of capital expended.

The ratio of the amount of maximum possible loss to the number of financial resources of the investor indicates the degree of risk leading to bankruptcy. This is measured with the help of the risk factor. The level of knowledge of specialists studying the causes of risks that may arise in processing industrial enterprises is formed based on the data they receive from statistical and other sources (internal and external) and their own scientific knowledge and logical reasoning. As a result of the general assessment based on the methodology proposed for risk assessment, the weight coefficient of the influence of the group of economic factors is 0.43; the weight coefficient of the influence of the group of production factors is 0.32; the weight coefficient of the influence of the group of other negative factors was calculated as 0.25. That is, for the effective management of risks, the ranking should be done from high weight coefficient to low weight coefficient. In the field of the risk assessment, it was determined that the optimal risk factor is equal to 0.3, and the risk factor that causes the bankruptcy of the investor is 0.7 or more. At the same time, the head of the enterprise or the investor must know the maximum amount of the loss and what it will result in, as well as decide whether to refuse the risk, take it on himself or transfer it to someone else. person When transferring the risk to another person, the head of the enterprise (or investor) should determine a favorable ratio between the insurance premium and the insurance amount.

By predicting the number of bankrupt enterprises through the methodology proposed above, and calculating the minimum rate of return achieved in the field for the effective management of possible risks of processing industry enterprises, it was concluded that the risk of non-competitiveness of products is to determine the minimum rate of profitability by the enterprises entering the field, that is, the enterprises of the field it is possible to determine the level of bankruptcy risk 3 quarters ago with 79% accuracy.

Thus, in order to optimize and effectively manage the risks arising in processing industry enterprises, to plan their management in an economic, mathematical and organizational direction, i.e. on quantitative and qualitative analysis, to collect information about the identified risks, the expected probability of loss and its impact on the results, the significant impact of possible damage It is very important to determine the levels, assess the possible damage, identify the most critical risks, prepare a project of measures for their optimization and efficient management, and implement measures such as improving the risk management system.

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## СОВРЕМЕННЫЕ АСПЕКТЫ ИНТЕРНЕТ-ТОРГОВЛИ ТОВАРАМИ: ПРОБЛЕМЫ ЛОГИСТИКИ ВОЗВРАТОВ В МЕЖДУНАРОДНОЙ И ВНУТРЕННЕЙ ТОРГОВЛЕ

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### РЕЗЮМЕ

В статье рассмотрены проблемы логистики возвратов в международной и внутренней торговле. Были выбраны отечественная и зарубежная интернет-площадки для проведения анализа по данной теме, рассмотрена их характеристика. Приведена сравнительная характеристика положений законодательства в сфере защиты прав потребителей, регулирующих возврат товаров от покупателей к продавцам при совершении сделок через Интернет.

**Ключевые слова:** логистика возвратов, интернет-торговля, интернет-площадка, маркетплейсы, Wildberries, AliExpress.

### ABSTRACT

The article deals with the problems of logistics of returns in international and domestic trade. Domestic and foreign Internet sites were selected for analysis on this topic, their characteristics were considered. A comparative characteristic of the provisions of legislation in the field of consumer protection regulating the return of goods from buyers to sellers when making transactions via the Internet is given.

**Keywords:** logistics of returns, online commerce, online marketplace, marketplaces, Wildberries, AliExpress.

### Введение

Значимость рассмотрения логистики возвратов в интернет-торговле, заключается в том что, с цифровой трансформацией торговых процессов большинство предпринимателей ведут свой бизнес в интернете. В то же время часть товаров возвращается от покупателей, следовательно, недостаточная организация движения возвратных материальных потоков оказывает отрицательное влияние на коммерческие и экономические показатели деятельности независимо от места размещения продавца в цепи поставок.

Управление возвратами является одним из бизнес-процессов управления цепями поставок, включающим в себя технологические и логистические виды деятельности. Особенностью данного бизнес-процесса является управление потоками ресурсов по принципу «вверх по течению» (от потребителя к поставщику) в отличие от бизнес-процесса «Выполнение заказа» (англ. – Order Fulfillment), который связан с управлением потоками ресурсов по принципу «вниз по течению» (от поставщика к потребителю) [1].

**Цель работы** состоит в анализе проблем логистике возвратов в международной и внутренней торговле.

#### **Задачи:**

дать характеристику отечественного и зарубежных маркетплейсов;  
дать сравнительную характеристику положений законодательства в сфере защиты прав потребителей, регулирующих возврат товаров от покупателей к продавцам при совершении сделок через Интернет;  
проанализировать работу возвратной логистики в интернет-торговле.  
Объект исследования – логистика возвратов в международной и внутренней торговле.  
Предмет исследования - интернет-площадки Wildberries и AliExpress.  
Научная новизна - заключается в исследовании показателей возвратных потоков и работы отечественных и зарубежных предприятий электронной коммерции, формулировке проблем логистической деятельности при организации возвратов товаров. В доступной литературе аналогичных исследований не было обнаружено.

#### **Методология**

В исследовании использовалась методология системного подхода и общенаучные методы, например анализ и синтез. Метод анализа позволил определить основные направления деятельности предприятий, условия возвратов товара.

#### **Результаты и обсуждение**

С каждым годом количество заказов в интернет-торговле увеличивается, что является устойчивой тенденцией. Люди уже привыкли к удобству использованию интернет-площадок для покупки различного рода товаров, что является положительным моментом для потребительского рынка.

Для продавцов, кроме положительных моментов, можно определить проблемы, к одной из которых относится необходимость нести расходы на возврат товаров, за счет чего они несут дополнительные издержки.

Затраты на возвратную логистику товаров, купленных через интернет в среднем, составляет 20%. Если проанализировать данные мировых источников, то можно рассчитать средний процент возврата потребителями своих покупок, который составляет 7 % [1]. Для продавцов чрезвычайно важно управление возвратами, так как, от быстроты реализации возвращенных товаров обратно в цепочку поставок зависит их эффективность их работы и уровень сервиса.

Wildberries – крупнейший онлайн ритейлер России. Интернет-магазин можно назвать международным, так как он работает в России, США, Франции, Италии, Испании, Белоруссии, Казахстане, Киргизии, Армении, Польше, Словакии, Германии, Израиле, Молдавии, Турции и Узбекистане, но его регистрация в российской юрисдикции [2].

AliExpress – глобальная виртуальная торговая площадка, предоставляющая возможность покупать товары производителей из КНР, а также России, Европы, Турции и других стран. Товары на площадке продаются в розницу и мелким оптом. Платформа не работает в КНР – там её заменяет другой магазин, следовательно, этот интернет-магазин по определению является международным [3].

Одним из условий дистанционной покупки является то, что потенциальные покупатели не имеют возможности лично ознакомиться с товаром до оплаты. Поэтому добросовестный продавец обязан предоставить покупателю полную, точную, актуальную и, главное, доступную информацию о товаре.

Согласно Закону РФ «О защите прав потребителей» и Постановлению Правительства РФ «Об утверждении Правил продажи товаров дистанционным способом», продавец обязан до заключения договора купли-продажи предоставить информацию об основных потребительских свойствах товара, его месте изготовления, цене, порядке оплаты и других условиях приобретения, о полном фирменном наименовании и адресе продавца, об информации доставки товара, сведениях о сроке службы, сроке годности и гарантийном сроке, информацию о сроке, в течение которого действует предложение о заключении договора, а также информацию был ли товар в употреблении или ранее ремонтировался [4]. Что касается, например Европы, то чаще используется более широкое понятие «потребительская политика», хотя довольно часто можно встретить и выражение «защита потребителей» (ст. 4 Договора о функционировании Европейского Союза). Положения и статьи Гражданских кодексов европейских стран, законов «О защите прав потребителей» ставят цель - защиту прав потребителей и требуют честности в договорных отношениях, борьбы с ложной рекламой, запрета на злоупотребление преимущественным положением и т.д.

В законах о защите прав потребителей сказано, что если потребитель отказывается от товара, то ему должны вернуть денежные средства, но при этом из них будет вычтена оплата за доставку возвращенного товара до продавца. При этом очевидно, что товар должен быть доставлен непосредственно до двери потребителя. Не так давно торговая площадка Wildberries установила дополнительную плату за возврат товара в среднем 75-100 рублей. Покупатели данным решением оказались не довольны, опираясь как раз таки на то, что товар доставлен в пункт выдачи и продавец обязан брать дополнительные издержки на себя. Если проанализировать в связи с чем связанные возвратные потоки, то есть два варианта: первый – продавец произвел поставку бракованной продукции, второй – покупатель заказал некоторое количество товарных единиц и забрал только лишь часть.

В первом варианте безусловно затраты на возвратную логистику должен нести сам продавец, так как, товар мог быть не проверен перед отправкой, либо поврежден в процессе транспортировки.

Второй вариант значительно интереснее, например, была заказана одежда или обувь, двух размеров для примерки, после чего одну позицию возвращают. В данном случае продавцу необходимо указать как можно больше информации и данных позициях (размерную сетку, маломерит ли одежда/обувь, возможно видео-обзор на товар и т.д.) и возврат товаров может уменьшится.

Хотелось отдельно отметить недавнее изменение оферты в интернет-магазине Wildberries. Согласно ей, держателей пунктов выдачи заказов (ПВЗ) лишили права оспаривать подмены. В частности, если покупатель возвращает бракованную вещь обратно в ПВЗ, с их владельцев удерживают полную стоимость товара. Кроме того, они обязаны выплатить всю цену продукции, если в полученной посылке не по их вине оказался другой предмет. По словам работников, списания за подмены начались уже 9 марта 2023 года [5].

На официальном сайте Wildberries указано, по каким причинам можно вернуть товар: производственный недостаток (брак) товара; не подошел размер, фасон одежды; цвет

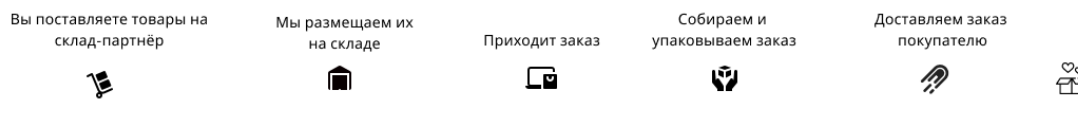
товара отличается от цвета модели с фотографии на сайте. Срок возврата ненадлежащего качества составляет 14 дней с момента получения товара. Перечисление денежных средств будет осуществлено в течение 10 календарных дней [6].

Учитывая приведенную информацию выше, Wildberries не должен взимать дополнительную плату за возврат товара. Условия возврата товара на AliExpress, как зарубежного поставщика, возможны только при выявлении брака. Доставка товара до конечного потребителя осуществляется внутри страны. Присутствуют складские комплексы для хранения товара поставщика. Поэтому если продавец находится в другой стране доставка товара не является сложностью.

Например, AliExpress предоставляет три варианта продажи товара: со склада AliExpress (Fulfillment by AliExpress – FBA); со своего склада (Fulfillment by Seller – FBS), с доставкой AliExpress (Почта России); со своего склада (Fulfillment by Seller – FBS) и доставлять их своими службами [7].

Fulfillment by AliExpress (FBA) - представляет собой хранение и доставку товаров непосредственно у самого маркетплейса, т.е. компания отправляет свои товары в центры выполнения заказов после чего торговая площадка обрабатывает прием, комплектацию и упаковку товаров перед отправкой клиенту (рисунок 1).

\* FBA — Fulfillment by AliExpress

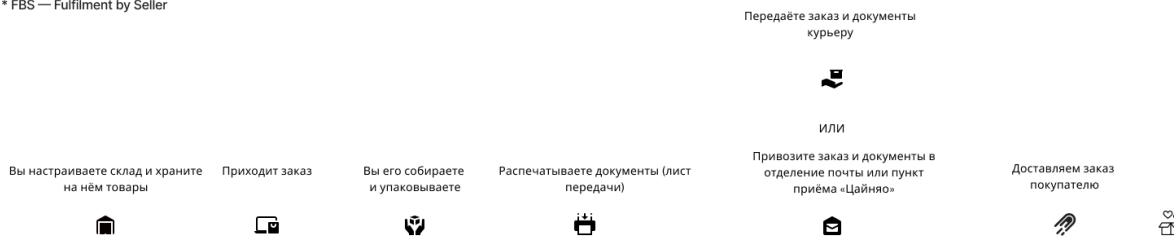


**Рисунок 1.** Продажа со склада AliExpress [7]

Fulfillment by Seller (FBS) - представляет собой хранение товаров на собственном складе и передачу его на доставку маркетплейсу (рисунок 2).

Изучая сайты аналитики маркетплейсов, таких как: Moneyplace, Sellmonitor, SellerFox, MPStats, Shopstat. Было выявлено, что только на одном аналитическом сайте (Moneyplace) представлена информация о возвратах товара и то с учетом поставок, что является недостаточной информацией.

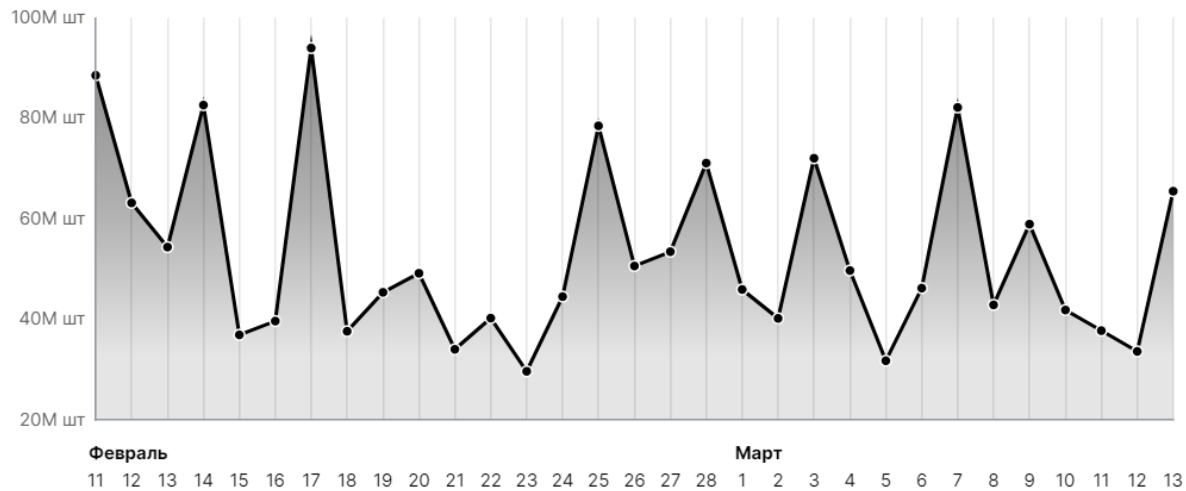
\* FBS — Fulfillment by Seller



**Рисунок 2.** Продажа со своего склада [7]

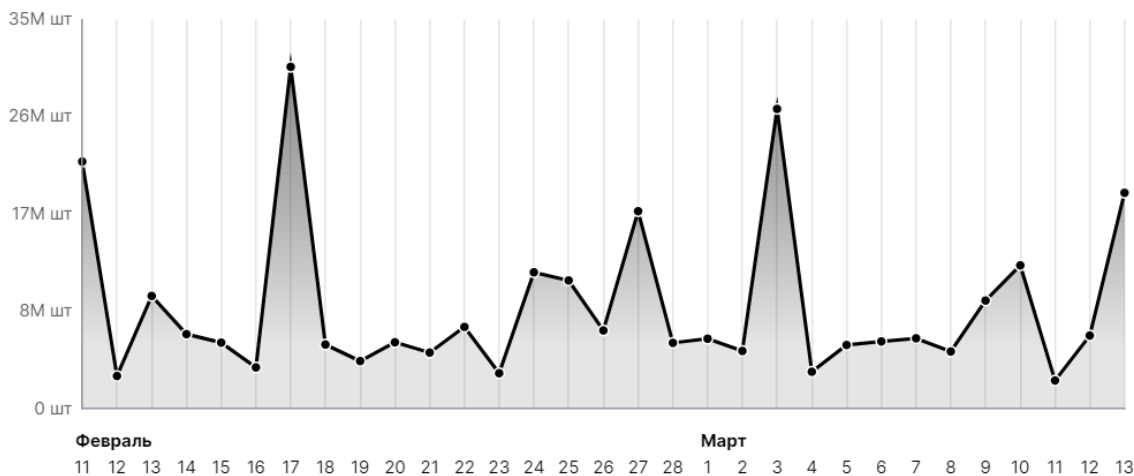
В связи с чем можно сделать вывод, что есть проблема в планировании логистической деятельности возвратных материальных потоков. На рисунках 3, 4 и 5 представлены сводные данные за месяц по категориям: дом, электроника и одежда для женщин.

На данных графиках представлены данные о возвратах и поставках: категория дом – 1 642 687 377 шт.; категория электроника – 284 694 720 шт.; категория женская одежда – 291 383 939 шт. [8].

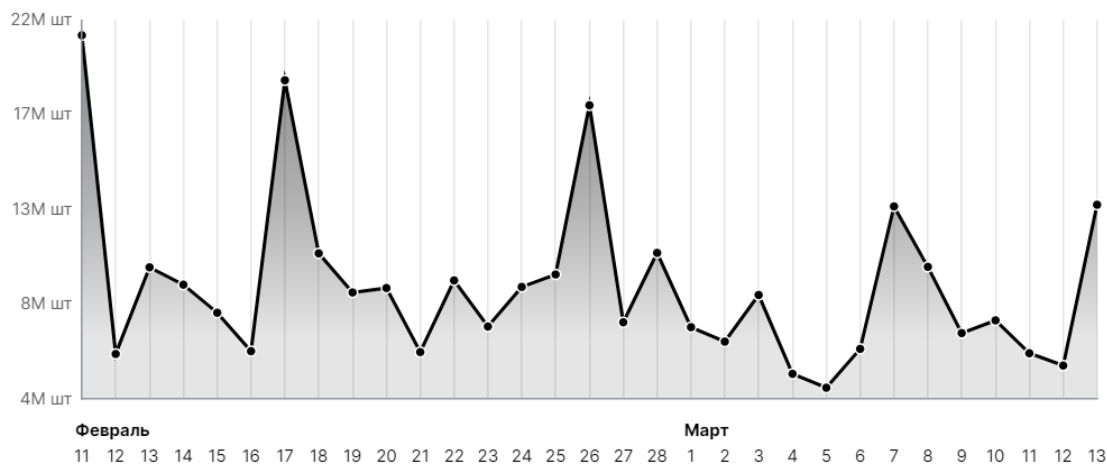


**Рисунок 3.** Сводные данные за месяц по категории «дом»

К сожалению, в данном сервисе не выделена данная аналитика маркетплейса AliExpress, только представлено количество продаж оборот и средний чек, о чем свидетельствует рисунок 6. Это может быть связано с тем, что возврат товара занимает достаточно большой срок.



**Рисунок 4.** Сводные данные за месяц по категории электроника.



**Рисунок 5.** Сводные данные за месяц по категории одежда для женщин.

Исходя из этого в 2019 году AliExpress ввел новую систему возврата товаров, вызвано повышением спроса, например на категорию «Одежда и обувь» и поможет убрать барьеры, связанные с опасениями не угадать размер, цвет, фасон выбранной одежды или обуви. Покупатель имеет право в течение 14 дней оформить возврат, а денежные средства поступят за 10-14 дней [9]. В отличие от Wildberries, AliExpress не взимает дополнительную плату за доставку товара до склада, что является большим плюсом для покупателей.

Если рассмотреть данную систему со стороны продавца, то для него возникает проблема в том, что объем импорта из Китая превышает экспорт в эту страну из России. Из-за небольшого объема отправить товар обратно будет стоить в десятки раз дороже, чем привезти его сюда.

Но при этом «источник, близкий к AliExpress, заверил, что продавцы могут страховать риск возврата товаров: в этом случае обратную отправку оплачивает страховая компания» [9]. Составим матрицу сравнения по критериям (таблица 1).

**Таблица 1.** Матрица сравнения Wildberries и AliExpress [6,7].

| Критерии                         | Wildberries | AliExpress |
|----------------------------------|-------------|------------|
| Цена                             |             | +          |
| Качество                         | +/-         | +/-        |
| Время доставки                   | +           |            |
| Вариант продажи товара (FBO/FBS) | +           | +          |
| Логистика                        | +           | +          |
| в том числе возвратная           |             | +          |

Из таблицы 1 видно, что две интернет-площадки практически на одном уровне. Но для AliExpress большим минусом является время доставки, в то время как для Wildberries цена

продукции. Это связано с тем, что большинство продавцом Wildberries закупают товары непосредственно в Китае.

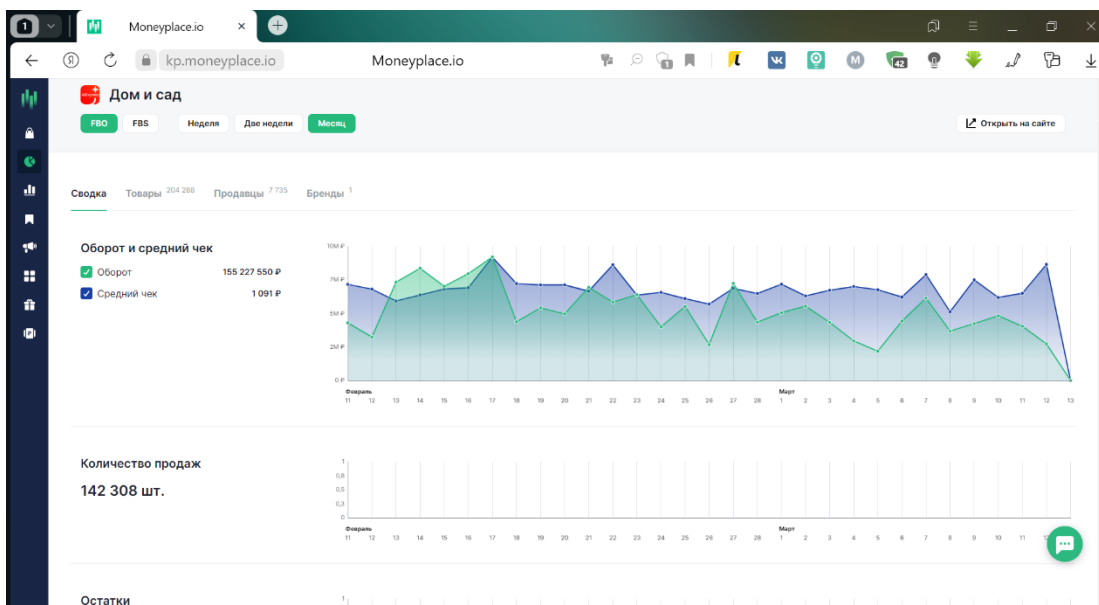


Рисунок 6. Сервис аналитики Moneyplace

## Выводы

Таким образом, Wildberries и AliExpress представляют собой торговые интернет-площадки для продажи товаров на отечественном рынке и международном. Что касается положений законодательства в сфере защиты прав потребителей на отечественном и международном рынке, то существенных отличий обнаружено не было. Цель данных законов заключается в том, чтобы защитить права потребителей при приобретении товаров, от ложной рекламы и т.д. Результаты исследования показали, что статистических данных о возвратных потоках для простых потребителей нет, это может свидетельствовать о том, что возможны проблемы в логистической деятельности при перемещении материальных потоков. Можно предполагать, что для продавцов маркетплейсов данная информация предоставляется и они могут с ней работать, только в случае отдельно выделенной аналитики по возвратам товара, а не совокупности с поставками. С каждым годом обе интернет-площадки совершенствуются, для более удобного использования, ее клиентами и продавцам. Так, например AliExpress усовершенствовал политику возвратов: затраты на обратную отправку будет нести страховая компания. Вероятно, Wildberries в скором времени решит проблему с взиманием с клиентов дополнительной платы за возврат товара по примеру AliExpress.

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## ÇİN'İN 'BİR KUŞAK, BİR YOL' PROJESİ ÇERÇEVESİNDE ORTA ASYA CUMHURİYETLERİ İLE İLİŞKİLERİ

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### ABSTRACT

Founded on October 1, 1949, the People's Republic of China has made great strides in the 70-year period, ranking first in the World economy in terms of purchasing parity and taking its place among the hegemonic powers of the world according to its military and political power. The important project in today's Chinese foreign policy is the "One Belt, One Road" project. While examining this project, Central Asia is the most critical region geopolitically for the stable operation of the project both in terms of China and globally. While the 'One Belt, One Road' project has great benefits for the region, it also brings problems that may cause problems for the regional states in their relations with China. Central Asia, which was an important market for China, especially in terms of energy, after the Cold War, is a geopolitical region that contains routes that can connect China to the world, and that can provide even more stability for China. In this context, China's relations with the Central Asian Republics will be discussed in this article. Russia's military power and historical presence in the region, the US's efforts to intervene in the region, Turkey's presence in the cultural field, and the fact that China feels its weight in the region economically is both a necessity for China and a striking situation in the region as a foreign policy tool. In the article, the main theory of the theory of realism, which is the meaning of power, will be examined in terms of economy, military power theories, and China's relations with the Central Asian Republics within the framework of the 'One Belt, One Road' Project.

**Keywords:** One Belt and One Road, Central Asian Republics, China, China-Central Asia, Realism.

### ÖZ

1 Ekim 1949 yılında kurulan Çin Halk Cumhuriyeti 70 yıllık süreçte büyük atılımlar gerçekleştirerek dünya ekonomisinde satın alma pariterine göre ilk sıraya yerleşmiş ve askeri ve siyasi gücüne göre de dünyanın hegemon güçleri arasında yerini almaktadır. Günümüz Çin dış politikasında önemli proje 'Bir Kuşak, Bir Yol' projesidir. Bu projeyi incelerken projenin hem Çin açısından, hem de küresel çapta istikrarlı bir şekilde yürümesi için jeopolitik açıdan en kritik bölge Orta Asya coğrafyasıdır. 'Bir Kuşak, Bir Yol' projesinin bölge açısından büyük kazançları olmakla beraber bölge devletlerini Çin ile ilişkilerde sıkıntı yaşatabilecek sorunları da beraberinde getirmektedir. Çin'in Soğuk Savaş sonrası özellikle enerji açısından önemli bir pazarı olan Orta Asya günümüzde ise Çin'i dünyaya bağlayabilecek güzergahları barındıran, Çin'in daha da istikrarını sağlayabilecek jeopolitik bölge niteliğini taşımaktadır. Rusya'nın bölgede askeri gücü ve tarihi varlığı, ABD'nin bölgeye müdahale çabaları, Türkiye'nin kültürel alanda bölgedeki varlığı Çin'in ekonomik şekilde bölgede ağırlığını hissettirmesi Çin açısından hem zaruret, hem de bir dış politika aracı olarak bölgede göze çarpan durumdur. Makalede realizm teorisinin ana kuramı olan güç anlamının içinde barındırdığı ekonomi, askeri güç kuramları ile Çin'in 'Bir Kuşak, Bir Yol' Projesi Çerçevesinde Orta Asya Cumhuriyetleri ile İlişkileri incelenecektir.

**Anahtar Kelimeler:** Bir Kuşak ve Bir Yol, Orta Asya Cumhuriyetleri, Çin, Çin-Orta Asya, Realizm

### Giriş

Günümüz dünyası artık Soğuk Savaş sonrası yaşanan ABD hegemonyasında tek kutuplu dünya düzeninin var olduğu bir yapıdan evrilerek çok kutuplu aşamaya geçtiği bir dönemi yaşamaktadır. Artık dünya düzeninde ABD ile beraber büyük ekonomik, askeri ve nüfus açısından güçlü Çin, ekonomik açıdan ABD ve Çin kadar güçlü olmasa da askeri açıdan büyük imkanlara sahip, tarihsel açıdan incelediğimizde büyük imparatorluklar geleneği olan Rusya Federasyonu da büyük rol oynamaktadır. Bunlara ek olarak, Avrupa Birliği, Asya’da ise Türkiye, İran, Pakistan ve Hindistan gibi bölgesel güçlerin de mücadelesini burada belirtebiliriz. Dünya jeopolitiği yeniden şekillenirken en önemli mücadele alanlarından biri şüphesiz ki Orta Asya jeopolitiğidir. Orta Asya tarihten bu yana her dönem önemli bir jeopolitik coğrafya olmasıyla beraber günümüz dünyasında da önemi iyice artmaktadır. Özellikle, Çin’in 2013 yılında ‘Bir Kuşak, Bir Yol’ Projesini ilan etmesi ile küresel dengelerin yeniden değişeceği sinyali belirlenmeye başlamıştır. SSCB sonrası bağımsızlığını ilan eden 15 devletten 5’i Orta Asya’da yerini aldı. Coğrafi açıdan Çin’e Avrupa’ya yeni bir koridor açan bölge aynı zamanda büyük enerji kaynaklarına sahip olduğu için Çin açısından hem de büyük bir Pazar önemini taşımaktaydı. Aynı zamanda bölgedeki devletlerden 4’ünün (Kazakistan, Özbekistan, Kırgızistan ve Türkmenistan’ın) Türk Cumhuriyeti olması ve azımsanmayacak Türk nüfusunun Tacikistan’da yaşaması Çin’in Sincan-Uygur Özerk Bölgesi (Bilinen ismi ile Doğu Türkistan) üzerinde dikkatini daha da artırmış ve Orta Asya bölgesine güvenlik açısından daha da önem vermesinde büyük pay sahibi olmuştur. Konu başlığımız olan Çin’in ‘Bir Kuşak, Bir Yol’ Projesi Çerçevesinde Orta Asya Cumhuriyetleri ile ilişkisini ele alan makalemizde ise tarihi dönemlerden itibaren inceleyeceğiz. İlk olarak İpek Yolu’nun Çin tarihindeki önemi başlığıyla makalemize giriş yapacağız. Çünkü ‘Bir Kuşak, Bir Yol’ Projesi Çin açısından “Yeni İpek Yolu” kavramı ile de anılmaktadır. Tarihin en köklü devletlerinden biri olan Çin İpek Yolu’nun tarihi önemine vurgu yaparak kıtalararası işbirliğindeki önemine uygun yeni dönemde adımlar atmış ve özellikle bu yolun önemli ayağı olan ticareti eski devirlerde önemine uygun olarak yeni dönemde de yeniden ayağa kaldırmayı hedeflemektedir.

İkinci Bölümde Çin’in İkinci Dünya Savaşı’ndan Günümüze Çin Halk Cumhuriyeti’nin yükselişine genel bir değerlendirme yapılacaktır. 1 Ekim 1949 yılında Çin Komünist Parti Lideri Mao Zedong tarafından Tiananmen meydanında ilan edilen Çin Halk Cumhuriyeti uzun savaşlardan geçen ve fakirlik altında olan bir ülkeden neredeyse 70 yıl sonra küresel güçlerden biri haline gelmesinin detayları ele alınacaktır.

Üçüncü Bölümde Çin’in ‘Bir Kuşak, Bir Yol’ Projesinin ortaya çıkması, ‘Bir Kuşak, Bir Yol’ Projesi çerçevesinde Çin’in faaliyetleri ve bu proje çerçevesinde hedeflenen güzergahlar ve ekonomik koridorlar hakkında bilgiler verilecektir.

Dördüncü Bölüm ise makalemizin ana odak noktasıdır. Burada özellikle Soğuk Savaş sonrası Çin’in Orta Asya coğrafyasına genel bakışı ele alınmakla beraber bu coğrafyadaki devletlere bakışı ve genel olarak siyasi ve ekonomik ilişkileri ele alınacaktır. Ayrıca ‘Bir Kuşak, Bir Yol’ Projesinin ilanı sonrası Çin’in bölge cumhuriyetlerinde yatırımları, ikili ilişkileri ve bu bağlamda bölge üzerindeki güzergahlarında yapılacak altyapı ve ulaşım hatları üzerinde değerlendirilmesi sonrası bölge halklarının Çin’e bakışına da yer verilecektir.

Beşinci bölümde Çin'in siyasi yapısı, ekonomi, güvenlik yapısı açısından Sincan-Uygur Özerk Bölgesi (Doğu Türkistan) politikası, 'Bir Kuşak, Bir Yol' projesi çerçevesinde bölgenin artan önemi ve Çin'in bölgedeki siyasetinin Orta Asya'da nasıl bir imaj yarattığına değinilecektir. Sonuç olarak, Çin'in 'Bir Kuşak, Bir Yol' çerçevesinde Orta Asya coğrafyasında politikası incelendikten sonra Çin'in bölgede karşılaşacağı jeopolitik mücadele, bölgenin proje açısından önemi ve bölge devletlerinin bu proje kapsamında kazançları ve tehditleri ele alınacaktır.

### **İpek Yolu'nun Çin tarihinde Önemi.**

İnsanlık tarihini incelediğimizde geçmiş dönemde dünyayı bir birine bağlayan güzergahların günümüzde tekrardan önemini arttığına şahidi olmaktayız. Bu güzergahlardan biri de Çin'den başlayarak Orta Asya üzerinden devam eden, Anadolu ve Akdeniz aracılığıyla da Avrupa'ya uzanan bünyesinde sadece ticareti değil, kültürleri, dinleri ve fikir akımlarını barındıran İpek Yolu'dur. Tarihte en eski ve en uzun yol karayolu olduğu ifade edilen İpek Yolu Doğu-Batı, Kuzey-Güney bölgelerinin yakınlaşmasında bir köprü gibi rol oynamıştır (Kayhan, 2020). Bu güzergah üzerinden Çin ile farklı bölge ülkeleri ticaretini genişletmekteydiler. Özellikle, Mısır, Pers ve Roma imparatorlukları ticarete Çin'den ile ipek satın almaktaydılar. İpekböcekçiliği yöntemleri devlet sırrı seviyesinde Çin İmparatorluğunda korunmaktaydı (Erel, 2021: 182). Bu güzergahta her ne kadar ipekten başka insanların temel ihtiyacı olan nesnelere de satılsa da, satılan ana nesne genellikle ipek olduğu için bölgenin ismini "*İpek Yolu*" diye ifade edilmiştir. Bölgeye bu ismi 1877 yılında Alman bilim adamı Ferdinand von Richthofen vermiş ve bu ifade hem Batı, hem de Doğu dünyasında geniş yaygınlaşmıştır. (Karluk, 2017: 96; Saray, 2021: 45. İpek Yolu'nun tarihi hakkında genel bilgi için bkz: Bozkurt, 2021).

İpek Yolu'nun bölgedeki önemine Çin imparatorları M.Ö dönemlerinde farkına vardılar. Özellikle, Çin aynı dönemde Batı ülkelerinde mevcut olan ipeğin değerinin Çin'den 46 kat daha pahalı olduğunu tespit ettikten sonra kendi ipeğini devlet kontrolüne almış ve bu ipeği Batı'ya ulaştırarak ticaretten fazla gelir kazanmayı hedeflemiştir. Bu doğrultuda Han İmparatoru Wu-Ti M.Ö 139 yılında Zhang Qian'ı günümüz Türkistan'a keşif için göndermiş, elçinin raporu sonucunda "İpek Yolu"nun inşası başlanmıştır (Tanrıdağlı, 2020: 12). Zaman içerisinde ilk oluşan rota kuzey rotası oldu. Bu aynı zamanda Zhang Qian'ın mimarı olduğu rota olarak bilinmektedir. Sonraki süreçte ise güneyden, yani deniz üzerinden yeni bir hat oluştu (Erel, 2021: 183. İpek Yolu güzergahları hakkında geniş bilgi için bkz: Şahin, 2020: 77-78). Tarihi süreç içerisinde Çin bu yoldan artık sadece ticaret için değil siyasi amaçlarla da kullanılmaktaydı. Bu doğrultuda Çin güzergah üzerinde yayılmacı politika izleyerek kendi kültürünü bu topraklara yaymış ve bölgede iskan politikası yürüterek kendi güvenliğini sağlama almıştır (Karluk, 2017: 96-97).



**Kaynak:** (Cinkara, 2019: 331)

### İkinci Dünya Savaşı'ndan Günümüze Çin Halk Cumhuriyeti'nin yükselişine genel bakış.

Çin dünya tarihin gördüğü en büyük medeniyet ve köklü devlet yapısına sahip devletlerden biridir. 3000 yıllık yazılı tarihe sahip olan Çin günümüzde 1.4 milyardan fazla nüfuzla 9,600,000 km<sup>2</sup> ile Asya kıtasında en büyük toprağa sahip olan ülke konumundadır (Karluk, 2017: 93). Uygarlık tarihine kağıt, pusula ve bunlar gibi daha önemli keşifleri veren Çin aynı zamanda kendi felsefelerinde dünyanın merkezi olarak görmekteydi (Taşağıl, 2017: 24). Bu düşünceye sahip olan Çin imparatorları da özellikle sanayi devrimlerini yakından inceleyememiş ve bu sebeptendir ki Batı karşısında geri kalmışlardır. Bunun sonucunda Çin XIX. Yüzyıldan itibaren Batı'nın işgali ile karşılaşmıştır. 1839-1842 yıllarında I. Afyon Savaşı ve 1856-1860 yıllarında II. Afyon Savaşında Büyük Britanya, Fransa ve ABD tarafından tarihinin en ağır mağlubiyetini almıştır. Özellikle, I. Afyon Savaşı sonucunda imzalanan 29 Ağustos 1842 tarihli Nanjing Antlaşması Çin modern tarihinin ilk eşit olmayan antlaşması sayılmaktadır (Kavala, 2019: 38). Bu tarihten 1 Ekim 1949 tarihinde Çin Halk Cumhuriyeti'nin ilanına kadar süren dönem Çin tarihinde "utanç yüzyılı" olarak belirtilmektedir. 1911 yılında Sun Yat-sen öncülüğünde milliyetçi bir devrimle Çin Hanedanlığı devrilmiş ve bununla da 2000 yıldan fazla mevcut olan Çin İmparatorluğu yerini Çin Halk Cumhuriyeti'ne bırakmıştır. Ancak bu devrim istikrarlı bir yapıyı beraberinde getirmemekle beraber milliyetçi ve komünist cepheler arasında mücadeleye de yerini bıraktı. Ek olarak, 1937 yılında Japonya'nın Çin'i işgal etmesi de Çin'e büyük bir şok etkisi yaratmıştı. İkinci Dünya Savaşı yıllarında Çin Cumhuriyeti Cumhurbaşkanı milliyetçi lider Çan Kay Şek ile Komünist Lider Mao Zedong birlikleri ülkedeki işgale karşı İkinci Dünya Savaşı'nın sonuna kadar birlikte mücadele ederek Çin'i işgalden kurtardılar. Bu dönem sonrasında Milliyetçi ve Komünist gruplar arasında savaş başlamış ve en sonunda Mao Zedong'un önderliğinde Komünist grup galip gelmiştir. Çan Kay Şek'in önderlik ettiği Milliyetçi Hükümet Tayvan adasına kaçarak orada Çin Devleti'nin temsilcileri olduklarını ileri sürdüler. 1 Ekim 1949 tarihinde ise Mao Zedong Tiananmen Meydanı'nda Çin Halk Cumhuriyeti'nin kurulduğunu ilan etmiştir (Çin'in bu döneme kadarki tarihi hakkında geniş bilgi için bkz: Kavala, 2015; Kavala, 2019: 21-160; Yıldırım, 2021: 30-282).

Mao Zedong Çin Halk Cumhuriyetini ilan ettikten sonra devletin dış politikasını 3 temel başlıkta belirlemiştir: 'yeniden başlamak', 'misafirleri çağırmadan önce evi düzene koymak', 'tek bir tarafa yaslanmak'(Pekcan, 2019: 10). Mao Zedong döneminde Çin Halk Cumhuriyetine karşı

ABD'nin öncülük ettiği Batı dünyası ideolojik sebeplerden dolayı mesafeli durmuş ve Çin Devleti olarak başkent Taipei olan Tayvan'daki Milliyetçi Hükümeti tanımaktaydı. Buna mukabil Mao Zedong ideoloji olarak Çin Halk Cumhuriyeti'ne yakın olan SSCB ile ilişkileri genişletmeye karar vermişti. Zaten SSCB de Çin Halk Cumhuriyetini ilk tanıyan devlet olmuştur. ÇHC ve SSCB arasında en temel yakınlaşmaysa 1950 yılında gerçekleşmişti. Mao Şubat 1950'de Moskova'yı ziyaret ederek ÇHC ve SSCB arasında ilişkileri genişletme taraftarı olduğunu belirtmiş ve ABD'nin öncülük ettiği Kapitalist Batı ile mücadele içerisinde olan Sosyalist Doğu Bloğu önderi olan SSCB bu teklifi olumlu karşılamıştır. Bu bağlamda imzalanan 'Çin-Sovyet Dostluk ve Karşılıklı Yardım Antlaşması' gereğince Sovyetler Birliği Çin Halk Cumhuriyetine yılda %1 faizle 300 milyon dolarlık kredi verecekti. Büyük bir savaş içerisinde çıkan ve bu zaman diliminde büyük yıkımla karşılaşan Çin bu antlaşma ile büyük kazanç elde etti. En önemlisi Sovyetler ile ilişkilerin kötüleştiği 1959 yılına kadar Sovyet mühendisleri Çin'de projeler yürüttü ve Çinli öğrenciler yetiştirdiler (Kavala, 2019: 162). 1950-1953 yılları arasında Kore Savaşı'nda Çin Halk Cumhuriyeti SSCB ile birlikte Batı Bloğuna karşı savaşarak resmen Sosyalist Doğu Bloğunda yerini aldığını göstermiştir. Ancak bir dönem sonra Çin Halk Cumhuriyeti ile SSCB arasında ilişkilerde soğuma görünmeye başlamaktaydı. 24 Nisan 1955 tarihinde 23 Asya ve 6 Afrika ülkesinin katıldığı Bandung Konferansı ile beraber aslında Doğu Bloğu açısından önemli bir an yaşanmıştı. Çünkü Çin SSCB ile beraber hareket etmeyerek o dönem dünyasında 'Üçüncü Dünya' olarak belirtilen Latin Amerika ve Afrika ülkeleri ile toplantı yapmış ve burada dünya üzerindeki mücadelenin emperyalist devletler ile Latin Amerika ve Afrika ülkeleri arasında olduğunun altını çizmiştir. SSCB ise bu teze karşı çıkarak 'Üçüncü Dünya' ülkelerine yardım etmeyi kabul etmemiştir (Pekcan, 2019: 13).

1958 yılından itibaren ise Çin'de başlayan büyük atılım ile Çin çok büyük gelişim ile hareket etmiş ve 1964 yılında nükleer deneme yaparak nükleer güç olduğunu dünyaya göstermiştir. 1970'li yıllara gelince ise Çin artık kendine farklı bir dış politika çizmeye başladı. Bu bağlamda Mao Çin'i ne SSCB, ne de ABD tarafında ifade etmedi. Mao'ya göre Üç Dünya Kuram'ı vardı ve Çin'de artık yerini Üçüncü Dünya tarafında almıştı. Ancak bir dönem sonra ABD ve Çin arasında yakınlaşma başladı. Vietnam Savaşı boyunca askeri olarak da ağır darbeler alan ABD hem dünya kamuoyunda imajını düzenlemek için yeni adımlar atmaya hedefleyerek, hem de SSCB'yi karşı önemli bir müttefik elde ederek SSCB'yi kuşatmayı hedeflemekteydi. Özellikle, İkinci Dünya Savaşı sonrası ABD Nicholas Spykman'ın meşhur 'Kenar Kuşak' teorisi ile SSCB'yi çevrelemeyi (containment) planlayarak jeopolitik hamlede bulundu (Spykman, 2020). ABD Devlet Başkanı Nixon danışmanı Henry Kissinger'in tavsiyelerine uyarak Çin Halk Cumhuriyeti ile ilişkileri artırarak Pekin'i ziyaret etmiş ve dünya tarihinde yeni dönem başlamıştır. Bu bağlamda ilk hamle olarak BM'de Çin'i temsil eden Tayvan Hükümeti yerine artık başkenti Pekin olan Çin Halk Cumhuriyeti yerini aldı ve günümüze kadar devam etmektedir. 1975 yılında Vietnam'dan tam olarak yenik şekilde ayrılan ABD 1979 senesinde Çin Halk Cumhuriyetini resmen tanımıştır.

Çin'in dışa açılımda en büyük hareketlenme ise Deng Xiaoping döneminde yaşandı. Mao Zedong'un mühaliflerinden olan Deng Xiaoping Çin'in fakir olduğunu ve ideolojik farklılıkların artık bir kenara bırakılmasını savundu. Ek olarak, Çin üretim yaparak deyim yerindeyse dünyanın üretim fabrikası olmayı önermişti. Deng Xiaoping'in Japonya'da öğrendiği tecrübeler de onun bu fikirlerinde önemli yer almıştı. Çin Komünist Partisi'nde mevcut olan Mao Zedong düşüncesine ek olarak bu kez Deng Xiaoping Teorisi ortaya çıkmıştı. Deng Xiaoping yukarıda belirttiğimiz fikirlere ek olarak ayrıca Çin'in sosyalist aşamaya geçmesi için kapitalist aşamaya geçmeli olduğunu ve o zaman elde edeceği bollukla sosyalist ekonomiye geçmesini savundu. Deng

Xiaoping Çin'e Özgü Sosyalizmi ve bu teorinin önemli parçası olan "Üç Temsil Düşüncesi" fikrini ortaya çıkardı (Konu hakkında bkz: Jinping, 2017: 42). Bununla birlikte Çin tarihinde "reform ve dışa açılım" diye ifade edilen bir dönem başlamıştır. Neoliberalizm döneminin Çin'de yaşanması ile beraber Batı'dan Çin'e büyük sermaye ve teknoloji transferi yaşandı. Ayrıca Çin burada Batı'nın üretimini kendisinde denemeyi başladı ve bu bağlamda çok önemli adımlar atıldı. (Deng Xiaoping dönemi hakkında geniş bilgi için bkz: Yıldırım, 2021: 298-302; Kavala, 2019: 196-220; Pekcan, 2019: 16-21).

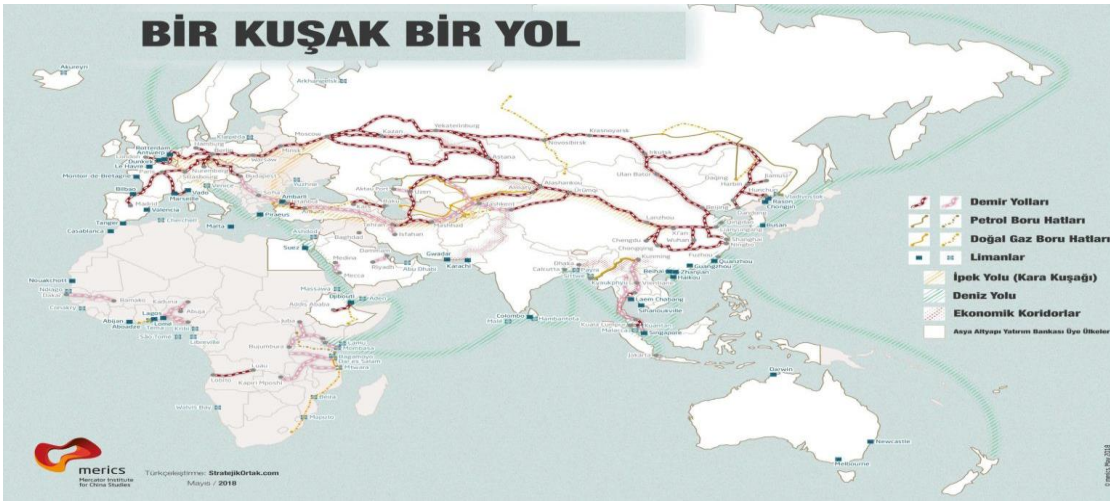
Soğuk Savaş'ın bitişiyile beraber dünyada ABD öncülüğünde tek kutuplu dünya düzeni başlamış ve neoliberalizm gittikçe dünyanın her yerine yayılmaya başladı. Çin 1978'de "reform ve dışa açılım" diye ifade edilen dönemi önceden başlattığı için Asya'da önemli bir üretim merkezi olmaya başlamıştı. 11 Aralık 2001 tarihinde Çin Dünya Ticaret Örgütü'ne üye oldu. 2005 yılında bölgesel güçten küresel güce adım atan Çin 2010 yılında ise ABD'den sonra dünyanın 2. küresel ekonomik gücü oldu (Tanrıdağlı, 2020: 16). Bundan sonraki dönemde Çin artık dünya üzerinde ağırlığını iyice artırmaya yönelme çabalarında bulundu. Aşağıda geniş şekilde bahsedeceğimiz 'Çin'in Bir Kuşak, Bir Yol' projesi üretim bolluğu yaşayan Çin'in küresel hegemon olma yolunda ortaya attığı bir projeydi. Günümüze geldiğimizde ise 2010 yılından itibaren dünyanın en büyük ihracatçı ülkesi olan Çin'in ekonomik anlamda dünya üzerinde ağırlığı gittikçe artmaya başlamıştı. 2014 yılında satın alma gücü paritesine göre ABD'yi yakalamış ve 2016 yılında da artık dünyanın bir numaralı ekonomik gücü olmuştur (Eslen, 2020: 71). 31 Aralık 2019 tarihinde başlayan ve günümüze kadar devam eden Covid-19 pandemisinin Çin'in Wuhan şehrinde ortaya çıkması ve dünyaya yayılması dünya ticaretini büyük sekteye uğrattı. Sıkı önlemler alan Çin şuan pandemi öncesi gücüne dönmüş durumdadır. Çin Devlet Döviz İdaresi'nin 2021 yılı itibarıyla Çin'in döviz rezervi Kasım 2021'e nazaran 27 milyar 800 milyon dolar artarak, 3 trilyon 250 milyar 200 milyon dolara ulaştığı ifade edildi. Ayrıca Aralık 2021'de döviz istikrarının korunduğu ve döviz rezervinin yükseldiği kaydedildi (CRİ, 2021).

### **'Bir Kuşak, Bir Yol' Projesinin Ortaya Çıkışı.**

Çin'in yukarıda incelediğimiz siyasi ve ekonomik yükselişi ile beraber artık dünyada hegemon güç olmak için adımlar atmaya başlamıştı. Günümüz Çin Devlet Başkanı Xi Jinping 2010 yılında Çin'in artan üretim bolluğunu hem Çin toplumu için, hem de Çin'in dış politikasında bir araç olarak kullanmayı hedefledi. Xi Jinping Çin'i yeniden kalkındırmayı gerçekleştirmeyi hedeflediğini belirterek Çin Komünist Partisi'nin kuruluşu olan 100. yılı olan 2021 yılında orta halli bir toplum kuracaklarını, Çin Halk Cumhuriyetinin 100. yılı olan 2049 yılındaysa Yeni Çin'i kuracaklarını belirtmiştir (Jinping, 2017: 64). Bu bağlamda hareket eden Xi Jinping dünya dengelerini küresel ölçüde değiştirme potansiyeli taşıyan 'Bir Kuşak, Bir Yol' projesini 7 Ağustos 2013 tarihinde Kazakistan'ın Astana (günümüz Nursultan) şehrindeki Nazarbayev Üniversitesinde açıkladı. Burada İpek Yolu Ekonomi Kuşağı'ndan bahseden Jinping 3 Ekim 2013 tarihinde ise Endonezya'da 21. Yüzyıl Deniz İpek Yolu projesini ilan etti. 3 kıta ve 70 ülkeyi kapsayan bu projede yer alan devletlerin milli geliri 25 trilyon dolar olmakla beraber bu projeyi desteklemek için İpek Yolu Fonu, Asya Altyapı ve Yatırım Bankası gibi kurumlar kurdu (Hasanzadeh, 2021). Çin'in 'Bir Kuşak, Bir Yol' projesi bağlamında yürüttüğü politikalar farklı başlıklarda toplanabilir. Özellikle, ekonomik anlamda öne çıkan bu projede borç diplomasisi kullanan Çin aynı zamanda Konfüçyüs Enstitüleri ile de kendi kültürünü dünya üzerinde yaymaya çalışmayı hedeflemektedir. Dış politika stratejisinde barışçıl kalkınmayı ticari ilişkilerle esas alan Çin bu proje kapsamında askeri üslerini kurma için de planlar yürütmektedir. Muazzam

büyükükte ekonomisi ile askeri gücünü de artıran Çin bu proje ile beraber askeri gücünün etkisini siyasi denklemde yumuşatmayı da hedeflemektedir (Karaca, 2020). 5 Ana güzergah ile Asya, Avrupa ve Afrika kıtalarını bu proje kapsamında 6 ekonomik koridor inşa etmeyi de hedeflemiştir:

- Yeni Avrasya Koridoru;
- Çin-Orta Asya-Batı Asya Koridoru;
- Çin-Moğolistan-Rusya Koridoru;
- Çin-Hindi Çin Koridoru;
- Çin-Pakistan Koridoru;
- Çin-Hindistan ve Bangladeş Koridoru. (Eslen, 2020: 80)



**Kaynak:** (Ed, 2019)

### **‘Bir Kuşak, Bir Yol’un İlanı Sonrası Çin’in Orta Asya Cumhuriyetlerine Bakışı.**

Soğuk Savaş’ın bitmesiyle beraber dünya ABD öncülüğünde tek kutuplu dünya düzeni kuruldu. Mevcut düzeni irdeleyen ABD’de ulusal güvenlik danışmanı görevi almış ve ‘Yeşil Kuşak’ teorisi mimarlarından olan Zbigniew Brzezinski tarafından Avrasya ABD için bir jeopolitik ödül olmakla beraber aynı zamanda Orta Asya coğrafyasının içinde bulunduğu alanları “Avrasya Balkanları” olarak belirtti. Ayrıca Brzezinski 21. Yüzyılda ABD’nin Çin ile her alanda mücadele edeceğini ve Orta Asya coğrafyasının da önemli bölge olduğunun altını çizmiştir (Konu hakkında bkz: Brzezinski, 2018). Aynı zamanda Rusya Federasyonu da Nisan 1993’de ‘Yakın Çevre’ doktrinini ilan ederek eski Sovyet coğrafyasına geri dönüş yapmıştır. 2000 yılında Rusya’da devlet başkanlığına Vladimir Putin’in gelmesi sonrası Rusya küresel politikalarda daha aktif rol oynamaya çalışmış ve özellikle ABD’nin Avrasya jeopolitiğinde söz sahibi olmasını önlemek için Çin Halk Cumhuriyeti ile ittifaka yönelmiştir. Özellikle, iki ülke arasında 2001 yılında başlayan stratejik ittifak antlaşmaları bölgede kritik bir yapı oluşturmuştur.

Bu bağlamda Çin Halk Cumhuriyeti Orta Asya Cumhuriyetleri ile ilişkilerini kurarken siyasi ilişkileri özellikle ekonomik ilişkileri güçlendirerek taçlandırmayı karar verdi ve askeri güç yapısını çok kullanmadı. Çin’in Batı Kalkınma projesinde jeoekonomik değeri çok yüksek olan Orta Asya coğrafyası Asya ve Avrupa’yı birbirine bağlayan bir köprü görevini de üstlenmiştir.

Genel anlamda incelediğimizde Çin'in SSCB sonrası bağımsızlığını kazanan Orta Asya Cumhuriyetleri ilişkilerinde özellikle enerji zenginliğine sahip olmaları açısından büyük önem vermiştir. Bu doğrultuda Çin'in Orta Asya Cumhuriyetlerine stratejik hedefleri şu şekildedir:

- Bölgedeki doğal kaynakların elde edilmesi;
- Bölge ülkeleri ile ekonomik ve ticari ilişkilerin güçlendirilmesi;
- Bölgede istikrarlı bir düzenin yaratılması;
- ABD'nin küresel hegemonyasına karşı işbirliğinin yapılması olmuştur (Ekrem, 2011: 7).

Çin SSCB sonrası bağımsızlığını kazanan Orta Asya Cumhuriyetleri ile ilişkilerini kurmak için ilk olarak 27 Aralık 1991 tarihinde bağımsızlıklarını tanıdı. Çin'in yukarıda belirttiğimiz ekonomik gücü kullanarak ilişkileri güçlendirme hedefi açısından diğer önemli adımı 1994 yılında attı. Çin Başbakanı Li Peng Özbekistan'ın başkenti olan Taşkent şehini ziyaret ederek bölge ülkeleri ile ekonomik dayanışmayı hedeflediklerini dile getirmiştir. Bununla da Çin aslında günümüze kadar devam eden ekonomik güç kuramını ilk olarak burada belirtmiştir (Alperen, 2018: 21). Ayrıca 1996 yılında Çin bölgede işbirliği ve güvenliği artırmak amacıyla Rusya, Tacikistan, Kazakistan, Kırgızistan'ın katılımıyla Şanghay Beşlisi'nin kurulmasında öncü rol oynadı. Özbekistan'ın 2001 yılında bu örgüte katılmasıyla Şanghay Beşlisi Şanghay İşbirliği Örgütü'ne dönüştü. 2013 yılında Çin'in 'Bir Kuşak, Bir Yol' projesini ilan etmesiyle birlikte Rusya Çin'in Orta Asya coğrafyasında hareketlenmesini endişe ile karşılamaktadır. Özellikle kısa vadede olmasa da orta ve uzun vadede Rusya ve Çin arasında bir rekabetin şiddetleneceği beklenmektedir (Yorulmaz&Yılmaz, 2021). 2020 yılında Covid-19 pandemisinin küresel ticarete etkisi sonrası enerjisini doğal kaynaklar tarafından büyük ölçüde sağlayan Rusya'nın ekonomik sisteminin büyük darbe alması sonrası bölgede yatırımları azalmış ve onun yerini Çin almaya devam etmiştir. Ek olarak, Konfüçyus merkezleri ile kültürünü yumuşak güc kuramı ile yayan Çin Orta Asya öğrencilere burs yardımını artırmış ve Orta Asya incelemeleri için 20'den fazla bilim merkezi kurmuştur (Nurgozhayeva, 2020). Ayrıca Rusya'nın ekonomi altyapısı incelediğinde Çin gibi Orta Asya ülkelerinden hammadde alıcısı olmadığı da gözlenmelidir (Taliga, 2021: 9; 21. yüzyılda Orta Asya'de değişen parametreler için bkz: ed. Yorulmaz&Yılmaz, 2020). Şimdi ise Çin'in 'Bir Kuşak, Bir Yol' Projesi çerçevesinde Orta Asya Cumhuriyetleri ile ilişkilerini değerlendireceğiz.





**Kaynak:** (Suyundikov, 2020).

### **Kazakistan**

Kazakistan Orta Asya coğrafyasında son 30 yıldaki yükselişi ile dünyanın dikkatini kendisinde toplamıştır. Bölgede zengin enerji kaynaklarına sahip Kazakistan Çin'in Orta Asya Cumhuriyetleri arasında en büyük ticari ortağı olarak devam etmektedir. (Erişim tarihi: 25 Aralık 2021). 'Bir Kuşak, Bir Yol' projesinin Kazakistan'da ilanı da aslında Çin'in proje kapsamında Kazakistan'a nasıl önem verdiğini gösteren faktörleri arasında göstere biliriz. BKBY projesi ilanı sonrası 2014 yılında Kazak petrolünün %50'si Çinli şirketlerle beraber üretildi. 2016 yılında projeyi desteklemek için Kazakistan-Çin Fonu da kurulmuştur. 9 Haziran 2019 tarihinde Kasım - Jomart Tokayev'in Cumhurbaşkanı seçilmesi sonrası Çin ile ilişkiler daha da üst düzey seviyeye çıkmıştır (Hasanzadeh, 2021). Ek olarak, Hazar'da en büyük payın Kazakistan'a ait olması da projedeki Orta Koridor'da Kazakistan'ın önemini iyice artırmıştır. Projenin ilanı sonrası Çin'in Kazakistan üzerinde ilgisi daha da artmıştır. Çinli şirketler ile beraber Kazakistan inşaat, maden, demiryolu gibi projeler 20'den fazla ortak proje yürütmektedir. BKBY projesi kapsamında Kazakistan'ın Çin'e borcu 12.3 milyar doları aşmış durumdadır. Her ne kadar Çin ile ticaret farkında çok büyük fark olmasa da ticaret farkı her yıl artmaya da devam etmektedir. Kazakistan'ın bağımsızlığı sonrası 19 milyar yatırım yapan Çin ayrıca bölgede kültürel faaliyetlerini de genişletme çabasıdadır (Konu hakkında geniş bilgi için bkz: Yılmaz, 2020: 5281-5284)

### **Türkmenistan**

Türkmenistan sahip olduğu doğal gaz rezervlerine göre dünyada dördüncü sıradadır. Doğal gazını genellikle Rusya'ya ve Rusya devlet şirketi olan Gazprom üzerinden Avrupa'ya satan Türkmenistan için Çin aynı zamanda önemli bir müşteri konumundadır. Çin'in 8 milyar dolarlık yatırımını Türkmenistan gaz sanayisine yapması sonrası Türkmenistan'dan Kazakistan ve Özbekistan üzerinden Çin'e gidecek 1800 km'lik gaz boru hattı inşa edilmiştir. 2038 yılında kadar Türkmenistan ve Çin arasında ikili gaz antlaşması devam edecektir (Kerimoğlu, 2019). 2009 yılından itibaren Türkmenistan doğalgazının en önemli alıcısı olan Çin her yıl Türkmenistan'dan 30 trilyon m<sup>3</sup> satın almaktadır (Hasanzadeh, 2021). 'Bir Kuşak, Bir Yol' projesinin önemli parçalarından biri olan Çin-Orta Asya doğalgaz boru hattı 2020 yılında 39 milyar m<sup>3</sup> doğalgaz taşımıştır. Çin'in ilk uluslararası gaz boru hattı olan hattın yılda 60 milyar m<sup>3</sup> doğalgaz taşıma kapasitesine sahip olduğu belirtilmektedir (Enerji Günlüğü, 2021).

### **Özbekistan**

Özbekistan ile Çin arasında 'Bir Kuşak, Bir Yol' projesi açısından önemli adımlar daha çok İslam Kerimov sonrası atılmıştır. Bu döneme kadarki süreçte de enerji kaynaklarının çıkarılmasında ve pamuk üretiminde Çin şirketleri ile beraber projeler yürütülmüştür. Ancak Kerimov sonrası Şevket Mirzoyev dönemi ile beraber Özbekistan ve Çin arasında ilişkiler BKBY projesi çerçevesinde ilerlemeye başlamıştır. 'Bir Kuşak, Bir Yol' projesi kapsamında Kazakistan'da 26 milyar dolarlık projeler yürüten Çin Özbekistan ile petrol, doğalgaz ve uranyum gibi alanları kapsayan 15 milyar dolar değerinde anlaşma imzalamıştır. 2017 yılında Çin ile Özbekistan arasında yüzden fazla antlaşmayı kapsayan 23 milyar dolarlık antlaşma imzalanmıştır (Omonkulov, 2020: 51-52). 2017 yılında Çin ile stratejik antlaşma imzalanmış ve Özbekistan devlet yetkilileri 'Bir Kuşak, Bir Yol' projesini desteklediklerini belirtmişlerdir (Hasanzadeh,

2021). Özbekistan ile ilişkilerde en kritik projelerden biri de Kaşgar-Oş-Andican (Çin-Kırgızistan-Özbekistan) demiryoludur. Bu projeyi Kırgızistan başlığında geniş şekilde irdeleyeceğiz.

### **Kırgızistan**

Çin-Kırgızistan arasında ilişkileri incelerken Kırgızistan'ın diğer ülkelerden ayıran önemi belirtmek gerekmektedir. Diğer Türk Cumhuriyetleri gibi enerji kaynaklarına sahip olmayan Kırgızistan diğer cumhuriyetlerden farklı olarak 2000'li yıllarda 'Renkli Devrimlere' maruz kalmıştır. Ayrıca bölgede tarihi etnik, dini ayrımından kaynaklanan mücadelelere de sahip olunmuştur. Özbekistan ile ilişkilerde en kritik projelerden biri de Kaşgar-Oş-Andican (Çin-Kırgızistan-Özbekistan) demiryolu Kırgızistan açısından da önem taşımaktadır. BKBY projesi kapsamında yapılması planlanan bu demiryolunun maliyetini hesapladığımızda Kırgızistan açısından günümüzde 7 milyar dolar olduğu belirtilmektedir (Salman&Özbay, 2019: 325). Çin bu demiryolu ile Avrupa ve Afrika'ya en kısa yolla ulaşabilir, Kırgızistan ve Özbekistan'ı kolay şekilde BKBY projesine bağlayabilir ve enerji ithalatını kolaylaştırabilir. Ancak demiryolu ray hatlarının günümüz demiryolu ray hatları ile aynı olamaması, bölgede etnik ve dini sorunlarının tarihten buyana var olması, Afganistan üzerinden radikal cihatçı grupların müdahalesi gibi ihtimaller sebebiyle demiryolunun hala yapılmamasına sebep olmaktadır. Ek olarak, Kırgızistan'da dış borcun yüksek olması ve ödeyememesi durumunda Çin'in toprak talebi iddiası karşısında Kırgız muhalefeti ve halkı tepki vermiştir (Tanrıdağlı, 2020: 59-71). Ayrıca Çinli işçilerin Kazakistan'da olduğu gibi Kırgızistan'da da çalışmaya gelmesi toplumda "Çinli işgali" korkusu yaratmıştır (Omonkulov, 2020: 59). 2018 yılında da Çinli nüfusun Kırgızistan'da geniş yayılması, Çinli işçilerin gayri-ahlaki hareketlerde bulunduğu iddiaları sebebiyle Kırgızistan'da ayaklanmalar başlanmıştı. 40 Çoro (40 Batur) isimli Sivil Toplum Kuruluşu bu hareketlenmelerde öncü olmuş ve Çin konsolosluğu ile beraber Çinli firmalar önünde protestolarda bulundular. Türkmenistan'dan Kırgızistan üzerinden Çin'e çekilecek yeni boru hattının 150'şer metre mesafesinde Çin askerlerinin yerleştirmesi iddiası karşısında ayaklanmaya mecbur etmiştir (Hasanzadeh, 2021).

### **Tacikistan**

Çin'in BKBY projesine en büyük destek veren ülkelerin başında gelen Tacikistan'ın durumu farklı bir boyuttadır. Tacikistan'a en büyük kredi veren devlet olan Çin'e Tacikistan BKBY projesi kapsamında 2.8 milyar dolar borçlanmış durumdadır. Çin'in borç diplomasisi tuzağı ile sık sık karşılaşan Tacikistan 2011 yılında Pamir bölgesindeki Magrab'da 1.158 km<sup>2</sup>'lik alanı Çin'e devretmiştir. Zaman zaman Badahşan bölgesindeki Çin'in askeri varlığı Tacikistan'ı rahatsız eden bir durumdur (Hasanzadeh, 2021). Ayrıca Tacikistan'ın zengin enerji kaynaklarına sahip olamaması Çin'e karşı elinin zayıf olmasına da sebep olmaktadır. Tacikistan'da ekonomik alanda baskın olan Çin nüfuzu muhalefetin tepkisine de sebep olmaktadır (Konu hakkında geniş bilgi için bkz: Yıldırım, 2021).

### **Çin'in Orta Asya Politikasında Sincan-Uygur Özerk Bölgesi'nin Önemi**

Yukarıda belirttiğimiz gibi Orta Asya bölgesinde özellikle 4 Türk Cumhuriyetinin ve azımsanmayacak sayıda Türk nüfuzuna sahip Tacikistan'ın bağımsızlığını kazanması Çin Halk Cumhuriyeti için başta ekonomik ilişkiler olmakla birçok konuda fırsat oluştursa da, özellikle güvenlik konularında birçok kaygıyı beraberinde getirmişti. Çünkü Çin'in batısında yer alan

Sincan-Uygur Özerk Bölgesi (Doğu Türkistan) genellikle Türk nüfuzun geniş yaşadığı bölge olmakla beraber aynı zamanda bölge en eski Türk yurtlarından biri olması sebebiyle Türk dünyası tarihi, kültürü açısından önemli bir anlam taşımaktadır (Doğu Türkistan Türklerinin tarihi hakkında bkz: Adıbelli, 2008; Saray, 2015; Kurban, 2020: 9-16). Tarihi açıdan incelersek Çin'in bölgeye yayılması M.Ö'den başlayarak mevcut olsa da, genel olarak bölgeyi artık tam ele geçirmek faaliyetleri XVII. Yüzyılın ortalarından başlayarak daha da keskinleşmiştir. İlk olarak 1757-1760 yıllarında bölgeyi ele geçirmeye yönelik askeri faaliyetleri başlamış olsa da büyük direniş ile karşılaşmışlardır. 1876 yılında Çarlık Rusya ile ittifak yaparak saldırıya geçen ve bölgeyi ele geçiren Çin 1882 yılında Doğu Türkistan'ı ilhak etmiştir(Özdağ: 2000; 206-207). Her ne kadar Çarlık Rusya ve Çin arasında ittifak gerçekleşse de, bölge uzun dönem Çarlık Rusya'sı ve Çin arasında da büyük mücadele alanına dönmüş Çarlık Rusya bölgeyi ilk ele geçirse de Çin'in bölgeden vazgeçmemesi, ayrıca Çarlık Rusya'nın Orta Asya, Afganistan ve Avrupa'da yeni güç mücadelelerine girmesi bu bölgenin Çin'e geçmesini kolaylaştırdı (Çarlık Rusya ve Çin arasındaki Doğu Türkistan mücadelesi hakkında bkz: Adıbelli, 2008: 53-58). Bölgede Doğu Türkistan Türkleri 1933 ve 1944 tarihlerinde kendi devletlerini kursalar da bunlar çok uzun ömürlü olmamakla beraber Çin'in bölgeye dikkatini daha da artırdı. 1955 yılında Çin bölgedeki ağırlığını artıracak çok kritik adım atmıştır. 1 Ekim 1955 tarihinde bölgenin ismini resmi olarak Çince değiştirdiler ve bunun sonucunda "Şincang Uygur Özerk Bölgesi" diye ifade ettiler. Ek olarak, bölgede Türk nüfusa karşı baskı süreci de gerçekleşti ve bölgede nükleer bomba testleri de yapıldı (Adıbelli, 2008: 19; Çeçen, 2015; 293). 2010 yılında yapılan nüfus sayımı zamanı 1945 yılında %83 olan Uygur Türkleri %45 seviyesine inmiş, 1945 yılında %6,2 olan Han Çinlileri ise %41 oranına yükselmiştir (Hasanzadeh, 2021). Çin'in bölgede Türk nüfusa karşı uyguladığı sert politika Orta Asya Türk Cumhuriyetlerindeki Türk nüfuzun Çin'e karşı olumsuz bakmasına sebep olmaktadır. Bu sebepten Çin'in Orta Asya'da güç sahibi ve "Bir Kuşak, Bir Yol"un gerçekleşmesi için olması için bölgedeki sert uygulamalarını durdurması gerekmektedir (Bazı araştırmacılar Çin'in Uygurlara baskı yaptığı iddialarının ABD kaynaklı olduğunu ileri sürmektedirler. Konu hakkında bkz: Erdoğan, 2021: 75-102).

Sincan Uygur Özerk Bölgesi Çin'in ekonomik politikalarında da en önemli yerlerden birine sahiptir. Çünkü Sincan Uygur Özerk Bölgesinde mevcut olan yüksek potansiyelli enerji kaynakları sahip olduğu için Çin'in bu bölgeye karşı hassasiyetini iyice artmaktadır. 1,828,418 km<sup>2</sup> yüzölçümüne sahip olarak Çin 1/6'ini oluşturan bölgede Çin'in zengin yeraltı kaynaklarının 3/4'nü bu bölgede bulunmaktadır. Günümüze kadar bölgede tespit edilen petrol varili 300 milyar, 220 milyar m<sup>3</sup> doğal gaz kapasitesine sahip 13 yatak mevcuttur. Çin'in sahip olduğu 148 madenin 118'i de burada yerleşmektedir ki bölgede 2 trilyon ton kömür rezervi de bulunmaktadır (Kul, 2017: 45-46; Tanrıdağlı, 2019: 43-44). En önemli ise bölge Çin'in başta Orta Asya olmakla aynı zamanda Güney Asya'ya açılan bir kapı görevini de taşımaktadır. Ek olarak, Orta Asya üzerinden gelen petrol ve doğal gaz boru hatları da bu bölge vasıtasıyla Çin'e ulaşmaktadır.

Bölgenin önemi Çin Devlet Başkanı Xi Jinping'in "Bir Kuşak, Bir Yol" projesini ilan etmesi sonrası iyice yükselmiştir. Bu proje çerçevesinde bölge ilk durak istasyonu konumunda olacaktır. Yukarıda belirttiğimiz Kaşgar-Oş-Andican demiryoluna ek olarak, Çin tarafından Pakistan'a yapılması planlanan Kaşgar-Gwadar demiryolunun da yapılması projesi de göz önünde bulundurulmalıdır. Bu demiryolunun yapılması Çin'e Gwadar limanı vasıtasıyla Orta Doğu ve Afrika'ya yakınında bulunması, Hindistan'a karşı stratejik mevki kazanması gibi fırsatlar getirirse de, aynı zamanda bölgedeki Müslüman inanca sahip nüfusun bir birine yaklaşması ve bölgedeki zenginlikten yararlanması sonrasında Türk nüfuzun güçlenmesi, aynı zamanda bölgede radikal

terör örgütlerinin faaliyete geçmesi olasılıkları da Çin için endişeleri beraberinde getirmektedir (Kaşgar-Gwadar demiryolu ile ilgili geniş bilgi için bkz: Tanrıdağlı, 2020: 71-78). “Bir Kuşak, Bir Yol” projesinde ilk durak olan Sincan-Uygur Özerk Bölgesi’nin önemini Çin belgelerinde incelediğimizde Çin resmi yetkilerinin bölge için kaygısının son dönemde daha da arttığını tespit etmekteyiz. Bildiğimiz gibi Çin uluslararası kamuoyunda Tibet, Sincan-Uygur Özerk Bölgesi ve Tayvan meseleleri ile sıklıkla karşılaşmaktadır. Çin yetkileri Sincan-Uygur ve Tibet bölgeleri için Tayvan’dan daha çok endişelenmektedirler. Bunun sebebinin ise Tayvan ve Çin’in aynı ırk ve kültürel değerler paylaştığını, ancak Sincan-Uygur ve Tibet bölgelerindeki nüfuzun ise farklı ırklardan oluştuğunu ve bu sebeple bölgeleri olası kaybetme durumunda bir daha geri alamayacaklarına bağlamaktadırlar (Tanrıdağlı, 2019: 13). Buna ek olarak, bölgenin Çin açısından önemini en keskin şekilde anlatan makale ise Çin Halk Cumhuriyeti ordusunun tuğgeneralı ve aynı zamanda Çin Savunma Üniversitesi Rektörü olan Liu Yazhou’ya aittir. 2010 yılında ele aldığı “Batı Bölge Teorisi” başlıklı makalesinde Sincan, yani Doğu Türkistan bölgesinin tarihte Çin’de olduğu dönemlerde Çin’in büyük güç olduğunu ifade etmiş ve Sincan bölgesi ile beraber Orta Asya Cumhuriyetlerinin yerleştiği Orta Asya coğrafyasını da “*Tanrı’nın Çinlilere Lütüfettiği Pasta*” olduğunu altını çizmiştir. En önemlisi ise bölgedeki jeopolitik güç mücadelesinde geniş açıdan bakıldığında Çin’in rakibinin ABD veya Rusya Federasyonu değil bölge devletleri ile etnik ve kültürel yakınlıkları bulunan Türkiye olduğu vurgulamıştır (“Batı Bölge Teorisi” makalesi için bkz: Tanrıdağlı&Özbay, 2021: 15-38).

#### SONUÇ

Dünya genelinde mevcut olan konjonktürde artık dünya üzerindeki güç dengesinin neredeyse 500 yıl sonra Asya’ya kaydığını incelemekteyiz. Asya’da büyük bir küresel güç olan Çin jeopolitik ve jeoekonomik açıdan attığı adımlar dünya düzeninin değiştirmeye yönelik hamleler arasındadır. ‘Bir Kuşak, Bir Yol’ projesi çerçevesinde atılan adımlar Çin’in ekonomik gücü ile incelendiğinde gerçekleşmesi muhtemel bir projedir. Ancak Çin’in bu politikalar karşısında yukarıda belirttiğimiz gibi kısa vadede ABD, orta ve uzun vadede Rusya Federasyonu ile jeopolitik bir mücadele içinde olacağı kesindir. Ayrıca bu bağlamda yükselen bir güç olan Hindistan gibi Asya’da mevcut bölgesel güçleri de vurgulamak gereklidir. Her ne kadar Çin karşısında yeterli güçlü bir ekonomik ve askeri güce sahip olmasa da özellikle bölge cumhuriyetleri ile etnik, dil, din ve tarihi ortaklıklar paylaşan Türkiye Cumhuriyetinin bölge ülkeleri ile işbirliği de Çin açısından dikkatle izlenmektedir. Orta Asya Cumhuriyetleri açısından incelendiğinde kısa vadede büyük kazanç getiren proje orta ve uzun vadede dikkatli olunmadığı sürece büyük riskleri beraberinde getirmektedir. Özellikle, Çin’in borç diplomasisi bağlamında dış politikada uyguladığı sistem ve projenin güvenliği bağlamında askerlerini kullanmak gibi uygulamalar bölge ülkeleri için tehditleri de beraberinde getirmektedir. Bölgedeki istikrar ve düzen Çin’in proje açısından en dikkat ettiği meselelerin başında gelmektedir. Bölge cumhuriyetleri bu bağlamda Çin ile ilişkilerde adım atmalı ve bu projede mümkün olduğu kadar ilişkileri kendi dengeleri çerçevesinde ele almak zaruretindedirler.

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## **CHINA'S RELATIONS WITH CENTRAL ASIAN REPUBLICS WITHIN THE FRAMEWORK OF THE 'ONE BELT, ONE ROAD' PROJECT**

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### **ABSTRACT**

Founded on October 1, 1949, the People's Republic of China has made great strides in the 70-year period, ranking first in the World economy in terms of purchasing parity and taking its place among the hegemonic powers of the world according to its military and political power. The important project in today's Chinese foreign policy is the "One Belt, One Road" project. While examining this project, Central Asia is the most critical region geopolitically for the stable operation of the project both in terms of China and globally. While the 'One Belt, One Road' project has great benefits for the region, it also brings problems that may cause problems for the regional states in their relations with China. Central Asia, which was an important market for China, especially in terms of energy, after the Cold War, is a geopolitical region that contains routes that can connect China to the world, and that can provide even more stability for China. In this context, China's relations with the Central Asian Republics will be discussed in this article. Russia's military power and historical presence in the region, the US's efforts to intervene in the region, Turkey's presence in the cultural field, and the fact that China feels its weight in the region economically is both a necessity for China and a striking situation in the region as a foreign policy tool. In the article, the main theory of the theory of realism, which is the meaning of power, will be examined in terms of economy, military power theories, and China's relations with the Central Asian Republics within the framework of the 'One Belt, One Road' Project.

**Keywords:** One Belt and One Road, Central Asian Republics, China, China-Central Asia, Realism.

## СОВЕРШЕНСТВОВАНИЕ МЕХАНИЗМОВ УПРАВЛЕНИЯ ЭКОНОМИКОЙ АЗЕРБАЙДЖАНА НА БАЗЕ СТРАТЕГИЧЕСКИХ ДОРОЖНЫХ КАРТ, ФОРМИРУЮЩИХ ДОЛГОСРОЧНУЮ КОНЦЕПЦИЮ УСТОЙЧИВОГО РАЗВИТИЯ НЕНЕФТЯНОГО СЕКТОРА

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### РЕЗЮМЕ

В статье отражены факторы, позволяющие добиться устойчивого развития ненефтяного сектора Азербайджана, а также приоритеты, обеспечивающие стратегическую конкурентоспособность экономической политики страны. Правильно разработанная экономическая политика на долгосрочной перспективе смогла создать прочный фундамент для ускоренного экономического развития и макроэкономической стабильности. В результате образовалась база для поддержки предпринимательства, увеличилась роль частного сектора и был достигнут прогресс интеграции национальной экономики в мировую систему.

В статье также указаны основные экономические реформы в области устойчивости и совершенствования ненефтяного сектора страны, которые требуют незамедлительной реакции в ответ на глобальные экономические изменения и вызовы. Они представлены в виде стратегических целей, отраженных в дорожных картах, программах и концепциях по отношению к диверсифицированной национальной экономики.

Стратегическая дорожная карта, определяющая главные направления экономических преобразований в различных областях, а также развитие малого и среднего предпринимательства, нацелена как на краткосрочный, так и долгосрочный период. В данном документе раскрыты не только цели и вытекающие из них задачи на указанный период, но и подробно описаны пути их эффективного достижения. Как указано в Стратегической дорожной карте, реализация всех целей легче будет достичь при содействии с национальными и иностранными партнерами как государственного, так и частного сектора.

В принципе Дорожная карта должна объединить концепцию развития национальной экономики с её прогнозируемым стратегическим анализом, в которой уточняются области применения указанных дорожных карт, её компоненты и стадии формирования указанных в ней долгосрочных мероприятий, составляющих содержание дорожной карты. В проект карты входит: согласованная карта целей, список долгосрочных мероприятий, уточнение результативных точек проекта и ключевых решений базовых управленческих решений, обобщение итогов и обобщение действенных показателей. В качестве пилотного региона в послевоенный период были выбраны освобождённые от оккупации области со своими природными ресурсами. Разработанная дорожная карта является путеводителем как для экономических районов, так и для всей экономики в целом.



В заключительной части указаны главные направления в рамках стратегических реформ, влияющие на финансовую, экономическую макроэкономическую и стабильность страны и пути повышения их модернизации.

**Ключевые слова:** устойчивое развитие, экономические реформы, нефтегазовый сектор, зелёная энергетика, диверсифицированная экономика.

## Введение

Ссылаясь на позиции основателя независимого Азербайджанского государства Гейдара Алиева, Азербайджан с большой уверенностью взялся за устойчивое развитие экономики страны. В современное время страна переживает пост-пандемический и послевоенный периоды, которые сильно отразились как на экономическом, так и политическом, культурном и социальном развитии. Сегодня государство переходит к более сложному реформированию структур на фоне современных мировых предпочтений.

Начиная с 2004 года вводимые реформы относительно социально-экономического развития регионов страны привели к положительной динамике трансформации экономики, модернизации и увеличению финансовой устойчивости, ускорению темпа реконструкции социально-экономической инфраструктуры регионов и экономики в целом, которые в свою очередь позволили решить большое количество экономических, политических и социальных проблем, увеличили социально-материальное благосостояние народа, открыли новые возможности для развития человеческого капитала и ускоренного внедрения и развития инноваций. Все это дало толчок принятию кросснаправленных стратегических приоритетов - «Главные направления стратегической дорожной карты по национальной экономике и основным секторам экономики», утвержденные Президентом Азербайджанской Республики Ильхамом Алиевым от 16 марта 2016 года, по 11 секторам относительно развития национальной экономики. Для реализации данной концепции, проведя всесторонний анализ состояния экономики страны, были утверждены основные позиции, в том числе была создана специальная группа, которая при совместном участии с зарубежными экспертами, научно-исследовательскими организациями выполняет разработку программных планов развития, подготавливает проекты соответствующие долгосрочным позициям по основным секторам экономики [4].

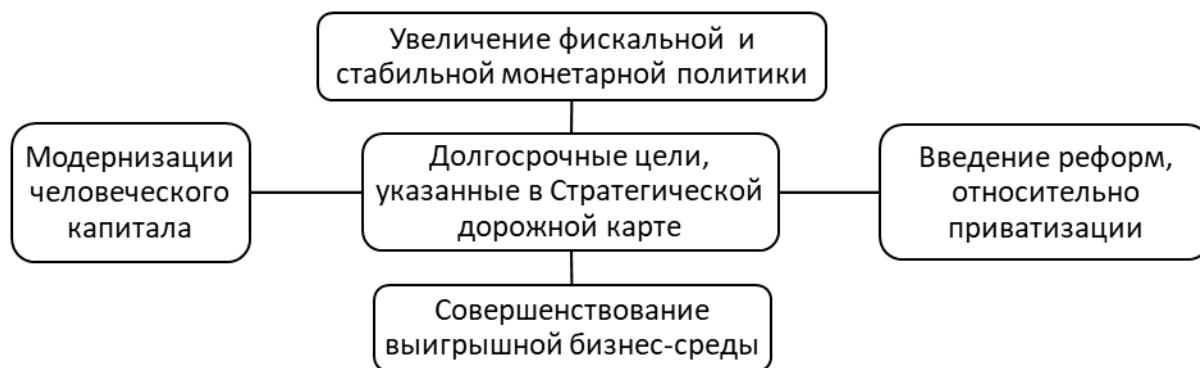
Азербайджанская Республика благодаря финансовым потокам от продажи энергоресурсов, обеспечив национальную энергетическую безопасность, выбрав правильный курс внешнеэкономических связей смогла обеспечить себе стратегическую мощь касательно геополитики и геоэкономики. Всё вышесказанное позволило Азербайджану реализовать себя в крупномасштабных проектах, таких как, Южный Газовый Коридор, давший толчок ещё более тесному сотрудничеству как с соседними странами, так и со странами Западной Европы, позволившему обеспечить стране статус «стратегического игрока», который на сегодняшний день смог добиться право голоса на мировой арене [3].

Для последующего закрепления позиций страна задействовала механизм инновационного развития национальной экономики, приняв концепцию «Взгляд в будущее - Азербайджан-2025 и последующий период, в которой отражены основные направления и приоритеты экономического и социального развития Азербайджанской Республики. На основе данных приоритетов в рамках указа президента была продлена программа относительно «Социально-экономического развития регионов на 2019–2023 года», а также принята

«Стратегия социально-экономического развития на 2022-2026 года» [5]. По прогнозам аналитиков реализация этой Стратегии позволит существенно изменить экономику страны к 2026 году, пере-трансформировав существующие факторы воздействия для ускорения темпов развития выбрав более действенные приоритеты, обеспечивающие устойчивость экономики и увеличивающие занятость населения страны.

В стратегической карте учтены основные факторы, позволяющие ускорить экономическое развитие создающие большие перспективы для содействия с представителями частного сектора. Здесь также указаны как государственные инвестиции смогут стать катализатором, а как частный сектор может стать движущей силой экономического развития.

Чтобы достичь стабильного экономического развития в контексте Стратегической дорожной карты были выделены фундаментальные долгосрочные цели, указанные на рисунке 1.



**Рисунок 1.** Долгосрочные цели Стратегической дорожной карты [Источник – 4. Составлен автором]

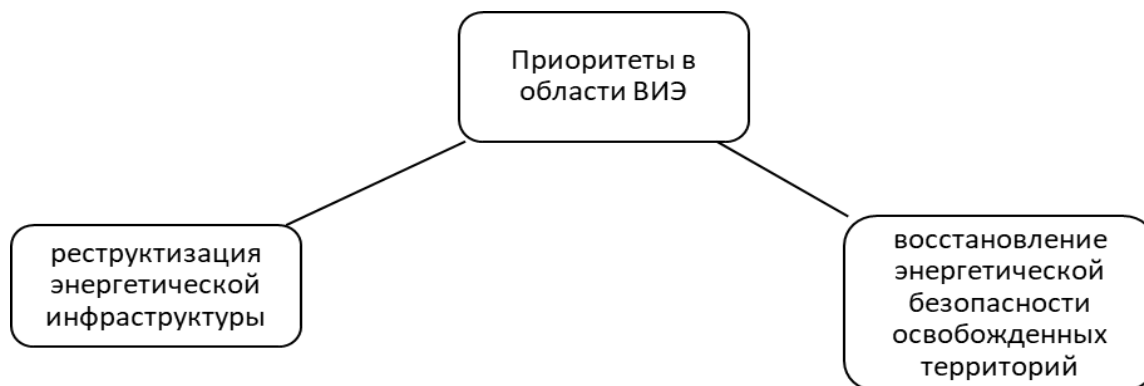
Нельзя не отметить сущность и важность возобновляемых источников энергии, ведь именно от их использования и от потока средств от их продажи зависит развитие и становление нефтегазового сектора Азербайджана. В ходе экономического развития, определенного Президентом Азербайджанской Республики Ильхамом Алиевым в отношении территорий, освобожденных от оккупации, была выдвинута стратегическая перспектива относительно их превращения в зону «зеленой энергетики», дав обобщенное пояснение о потенциале этих территорий, богатых возобновляемыми источниками энергии [8].

Для реализации данной стратегии было решено сотрудничать с японской компанией TEPCO и подготовлен соответствующий Концептуальный документ, целью которого является обеспечение местности экологически чистой зеленой энергией с использованием потенциала возобновляемой энергетики, имеющегося на освобожденных от оккупации территориях. В рамках этой концепции были разработаны различные модели энергопотребления.



**Рисунок 2.** Мероприятия в рамках создания Зоны зеленой энергетики  
 [Источник – 8. Составлено автором]

На сегодняшний день основными направлениями в области ВИЭ являются:

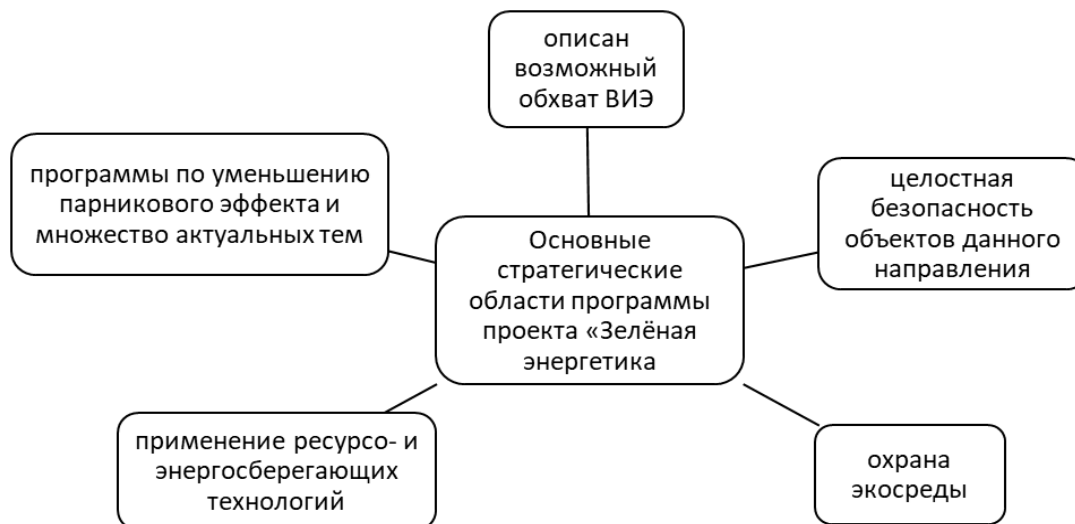


**Рисунок 3.** Главные направления в области ВИЭ [Источник – 8. Составлено автором]

Вышеуказанные мероприятия дадут существенный толчок ускоренному развитию нефтегазового сектора, как поставщика материалов и оборудования. К примеру в кратчайшее время приложив усилия строительство было завершено и уже введены в эксплуатацию 4 гидроэлектростанции восстановленные в Суговушане, Кельбаджаре и Лачине. Помимо всего этого между Министерством энергетики и компанией ВР был заключён договор для разработки и реализации проекта о строительстве солнечной электростанции в Зангилане и Джебраиле.

В рамках укрупнения и усиления проекта «Зелёная энергетика» с 31 мая по 3 июня 2023 года при организации поддержки компаний «Caspian Event Organisers» и «Iteca Caspian» будет проведена 11-я Каспийская международная выставка энергетики и зеленой

энергетики «Caspian Power». Участниками выставки «Caspian Power» будут представлены проекты, планы, программы и предложения по развитию и использованию ВИЭ. Помимо вышеперечисленного в данном направлении также планируется обмен передовым опытом о новейших умных технологических продукта, а также стороны будут делиться опытом о составлении стратегий развития в области электроэнергетики (рисунок 4).



**Рисунок 4.** Основные стратегические области программы проекта «Зелёная энергетика» [Источник – 8. Составлено автором].

В рамках данного проекта будут участвовать как ведущие компании Азербайджана, так и США, Великобритании, Италии, Германии, Турции, ОАЭ, Израиля, Российской Федерации и т.д., что свидетельствует о грандиозности его масштаба и заинтересованности сторон на мировой арене [8], которое в свою очередь требует незамедлительных принятий решения в области нефтегазового сектора, как коллектора, от которого зависит обеспечение всем необходимым для формирования современной инфраструктуры как на микро, так и на макроуровне. Всё вышеперечисленное прямо сказывается на устойчивом развитии нефтегазового сектора, от темпа развития и диапазона воздействия которого зависят все направления экономической деятельности.

Тенденцию развития нефтегазового сектора в направлении частного сектора, а также микробизнеса и МСП, можно достичь за счёт эффективного стимулирования и реорганизации условий развития, в связи с чем возрастает активность инвесторов как частных, так и зарубежных, увеличивается экспорт по многим направлениям экономики [4].

При помощи государственной поддержки привлекаются ещё больше инвестиций в нефтегазовый сектор, а именно в те направления, которые считаются стратегически важными для обеспечения конкурентной устойчивости. В частности к ним можно отнести сельское хозяйство, перерабатывающие отрасли, такие как, химическая, лёгкая, пищевая промышленность, металлургия, машиностроение и т.д., которые позволят укрепить национальную безопасность, снизить импортозависимость, создадут благоприятные

условия для усовершенствования человеческого потенциала, а также модернизируют сферы услуг.

К примеру, к середине 2022 года нефтепродукты экспорт Азербайджана увеличился на 38,6%, свидетельствуя, что экономика страны придерживаясь инновационного развития смогла снизить углеводородную зависимость.

Опираясь на данные Государственной таможенной службы, в первой четверти прошлого года экспорт страны по нефтепродукции составил около \$966 млн, что на 38,6% больше в сравнении с тем же периодом 2021 года. Валовый внутренний продукт (ВВП) по отношению к нефтепродукции в данном периоде увеличился на 11,5% [1].

Международный валютный фонд (МВФ) прогнозирует, что в текущем 2023 году рост ВВП по нефтепродукции Азербайджана увеличится на 2,5%.

В целях ускорения экономического роста было создано Агентство по продвижению экспорта и инвестиций (AZPROMO), взявшего на себя миссию продвижения национального бизнеса на международные рынки. Данная структура помогает местным производителям активно участвовать в международных выставках и ярмарках, тем самым расширяя рынок сбыта национальных товаров.

AZPROMO также активно содействует в привлечении иностранных инвестиций в страну, а именно в экспортно-ориентированные сектора, тем самым повышая экспортные возможности нефтепродуктивного сектора, как нацеленного ориентира экономического развития Азербайджана [1].

Наряду с этим, в стране активно развиваются промышленные парки (Сумгайытский химико-промышленный, Гарадагский, Балаханский, Пираллахинский и Мингячевирский промышленный парки), на долю которых приходится около 24% инвестиций в нефтепродуктивный сектор. Экспорт продукции из промышленных зон в 2022 году увеличился в 2,8 раза по сравнению с пандемийным периодом, где доля продукции нефтепродуктивной промышленности выросла на 31% [2].

Для того чтобы Азербайджан мог шагать наравне со странами с высоким уровнем дохода, экономика страны должна расти более ускоренно нацелившись на долгосрочную перспективу. Для этого нужен толчок, который вызовет экономический рост, с позиции инклюзивности и устойчивости. Именно такой экономический прогресс сможет создать базу для стабильного и длительного увеличения доходов населения страны.

Разработанные программы по «озеленению и декарбонизации» экономики подталкивают государство в направлениях развития сфер услуг, снизив акцент от сырьевых отраслей, ведь борьба с загрязнением окружающей среды, снижение парникового эффекта, рациональное использование природных ресурсов, а также защита флоры и фауны входят в число главнейших принципов стабильной и устойчивой экономики. Достичь эти цели можно согласно Парижскому соглашению об изменении климата и приоритетов развития страны, которые требуют увеличения возможностей страны в русле возобновляемых источников энергии, а также применении экологически чистых ресурсосберегающих и энергоэффективных технологий [5].

Ожидается, что устойчивость экономического роста обеспечит баланс развития между городами и сёлами. В этих целях был разработан проект «Умная деревня» [6]. Реализация данной концепции «Умная деревня» отражается в «Национальном плане действий по продвижению открытого правительства на 2020-2022 годы», утвержденном распоряжением, подписанным Президентом Ильхамом Алиевым. Эта концепция позволит

использовать возможности ИКТ для облегчения жизни населения и увеличения эффективности в различных сферах экономики, в том числе в производстве и услугах. С этой целью во многих сёлах, освобожденных от оккупации уже задействован данный механизм. К примеру, в рамках этого проекта для жителей села Агали Зангиланского района создаются фермерские хозяйства. Этот проект был разработан совместно Государственным агентством занятости при Министерстве труда и социальной защиты населения, Агентством аграрных услуг при Министерстве сельского хозяйства, Агентством по развитию малого и среднего бизнеса и Зангиланской районной исполнительной властью. Согласно проекту, здесь ожидается стремительное развитие малого предпринимательства, которое повлечёт за собой увеличение занятости населения [7]. Помимо вышеперечисленных действий в стратегической перспективе концепций и программ лежат тенденции стремительной цифровизации экономики, которые ведут к нижеследующим результатам (рисунок 5) [5]:



**Рисунок 5.** Результативность цифровизации экономики в стратегической перспективе концепций и программ [Источник – 5. Составлено автором]

Долгосрочные перспективы, отраженные в Стратегической дорожной карте до 2025 года, нацелены на усиление позиций экономики страны в русле конкурентоспособности, которая позволит достижению более устойчивого развития. Азербайджан оценивается ведущими мировыми финансовыми организациями (Doing Business) как страна со стабильными макроэкономическими показателями. Угрозу данной стабильности может вызвать снижение цен на энергоресурсы, которая именно и указывает на зависимость национальной экономики от невозобновляемых энергетических ресурсов. Именно этот нюанс и подтолкнул правительство к разработке долгосрочных тенденций развития ненефтяного сектора, хотя и очевидно понимая, что локомотивом развития экономики в данный период является нефте-газовое направление.

Обобщив всё вышеперечисленное, можно указать, что именно концепция Стратегической дорожной карты позволит осмысленно подойти к построению инклюзивной, диверсифицированной и сильной экономики, которая сможет осмысленно использовать чёрное золото для обеспечения тенденций улучшения социального благосостояния населения страны и достижения высокого уровня человеческого капитала, ведь именно развитие человеческого капитала и повышение уровня жизни граждан являются базовыми областями достижения долгосрочных целей.

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## УПРАВЛЕНИЕ РИСКАМИ В УСЛОВИЯХ ГЛОБАЛИЗАЦИИ НА ПРИМЕРЕ МАШИНОСТРОИТЕЛЬНОЙ ОТРАСЛИ АЗЕРБАЙДЖАНА

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### РЕЗЮМЕ

Одним из ключевых процессов развития мировой экономики XXI века является прогрессирующая глобализация, т.е. качественно новый этап в развитии интернационализации хозяйственной жизни.

В статье исследуются современные пути развития машиностроительной отрасли Азербайджана в глобальных условиях, а также обусловлена важность управления рисками, их оценивание и мониторинг развития предприятий машиностроения для увеличения конкурентоспособности с целью достичь синергетического эффекта путём интеграции, повышения его эффективности в развитии машиностроительных предприятий. В свою очередь всё это позволит им освоить новейшие технологии, увеличить рентабельность капитала и их конкурентоспособность на глобальных рынках.

Цель исследования данной работы - рассмотреть основные аспекты реализации концепции управления рисками при помощи разработки путей увеличения эффективности риск-менеджмента относительно интеграционной политики предприятий машиностроительного комплекса.

Все сферы экономической деятельности подвержены риску, а управление риском улучшает предсказуемость и определенность, что дает чувство уверенности при определенных ситуациях.

**Ключевые слова.** Глобализация, машиностроительная отрасль, экономика, управление рисками.

Машиностроение – одна из ключевых отраслей Азербайджана. Считается, что состояние данной отрасли в первую очередь определяет технологический уровень развития страны. Установлено, что прибыль, получаемая от данной отрасли, способствует развитию всей промышленности развитых стран мира и их техническому перевооружению.

Машиностроительная отрасль Азербайджана охватывает энергетику, электротехнику, радиоэлектронику, приборостроение, станкостроение, транспорт, сельское хозяйство и др. машиностроительные сферы, взаимодействующие друг с другом.

Машиностроение занимает 1-ое место среди промышленных отраслей по ценности производимой продукции и количеству работников.

До недавнего времени машиностроение в Азербайджане специализировалось на сфере нефтяного машиностроения. Эта сфера производит  $\frac{1}{4}$  часть общей продукции, производимой в этой сфере. Одним из крупнейших предприятий в сфере нефтяного машиностроения является «Объединение Главнефтьхиммаш». Это предприятие экспортирует изготавливаемую продукцию в 40 стран [7].



Стационарные платформы, изготавливаемые на Бакинском Заводе Глубинных Морских Оснований, находящемся в поселке Сахиль, позволяют пробурить скважину на глубине до 200-300 м от поверхности Каспия. Машиностроительный завод имени Саттархана, Кешлинский машиностроительный завод, Бинагадинские глиняный и сталелитейный заводы так же являются крупными предприятиями, относящимися к нефтяному машиностроению Азербайджана.

После сдачи в эксплуатацию в Баку Сталелитейного завода, Азербайджан приостановил закупку литой стали из-за рубежа [3,с.166].

За последние годы помимо нефтяного машиностроения в Азербайджане получили развитие более новые отрасли машиностроения. К таким можно отнести отрасли электротехники, приборостроения и радиоэлектроники.

Минувший год был непростым для азербайджанской экономики – пандемия, война, негативное воздействие от мировых экономических процессов. Тем не менее, правильность экономической политики и устойчивость экономической системы Азербайджана еще раз заявили о себе.

Азербайджан стремится расширить возможности в области машиностроения и модернизировать используемые технологии. В освобожденных районах имеются хорошие возможности для создания машиностроительного сектора. До сегодняшнего дня в Азербайджане наблюдалось значительное развитие этой отрасли, что подтверждается большим спросом на нефтегазовое оборудование из Азербайджана у других прикаспийских стран: Ирана, Казахстана, России и Туркменистана.

Отметим, что в Азербайджане за 2020 год было произведено машин и оборудования, автомобилей, прицепов и полуприцепов на сумму 352,2 миллиона манатов.

По сравнению с 2019 годом производство машин и оборудования увеличилось на 35,7 процентов, прочих транспортных средств – на 47 процентов [4].

В настоящее время отсутствует единое, общепринятое определение понятия глобализации. Так, американский экономист Дж. Даннинг под глобализацией подразумевает взаимосвязь индивидуумов и различных институтов в рамках мирового пространства, осуществляемую в личных или институциональных интересах, экономических, культурных или политических целях.

Профессор социологии Калифорнийского университета США М. Кастельс определил глобализацию как «новую капиталистическую экономику», а в качестве ее отличительных особенностей выделил информацию, знания и информационные технологии, являющиеся основными источниками роста и конкурентоспособности. Эта новая экономика организуется преимущественно через сетевую структуру менеджмента, производства и распределения, а не посредством отдельных фирм, как раньше, и является глобальной.

Глобализация – это многогранный процесс, охватывающий самые разнообразные аспекты общественной жизни. В связи с этим глобализацию можно охарактеризовать как степень интернационализации хозяйственной жизни, при которой реализуется свободное перемещение товаров и основных факторов производства. Многоступенчатый процесс глобализации заключается в усилении взаимозависимости и взаимовлияния различных сфер и процессов в рамках мирового пространства, превращении мирового хозяйства в единый рынок товаров, услуг, капиталов, рабочей силы, знаний и технологий, формировании единой сети информационных и инвестиционных потоков [8].

Глобализация экономики и ее влияние на страну стала особенно актуальной после непосредственных переговоров, к которым приступил Баку в 2004 году относительно вступления Азербайджана во Всемирно Торговую Организацию (ВТО), несмотря на то, что Азербайджан подал заявку на вступление в ВТО в 1997 году, а статус наблюдателя при ВТО имеет с 1997 года.

Современная ситуация в экономике Азербайджана, а также те инициативы, которые сейчас выдвигает азербайджанское правительство по развитию реального ненефтяного сектора, связаны, в первую очередь, со снабжением отечественного внутреннего, в частности, потребительского рынка продукцией. Именно поэтому, на сегодняшний день к вопросу вступления страны в ВТО нужно относиться с осторожностью. В этом направлении правительство придерживается правильной позиции. Ведь страна, вступив в эту организацию, столкнется с достаточно сложной конкурентной средой. А это приведет к существенному усложнению конкурентной борьбы для азербайджанских товаропроизводителей [5].

Глобализация выгодна, прежде всего, наиболее развитым странам. Это обусловлено особенностями исторического и экономического развития. Страна встала на путь перехода от командной экономики к рыночной не так давно. Процесс перехода Азербайджана на новую стадию развития экономики должен происходить «снизу», т.е. на микроуровне, путем выхода национальных компаний на международный рынок.

Азербайджан за последнее время осуществил ряд реформ, в том числе принял 12 стратегических дорожных карт для развития экономики, внес изменения в регулирование сферы торговли, усовершенствовал торговую и логистическую инфраструктуры.

В «Стратегической дорожной карте национальной экономики и основных секторов экономики», принятой в 2016-ом году в Азербайджане, указаны все важные отрасли экономики, которые требуют особого внимания и государственной помощи. К ним относятся перспективы национальной экономики Азербайджана, развитие нефтяной и газовой промышленности (включая химическую продукцию), производство и переработка сельскохозяйственной продукции, производство в стране потребительских товаров на уровне малого и среднего предпринимательства, развитие тяжелой промышленности и машиностроения, развитие специализированной туристической индустрии и др.

В условиях глобализации Азербайджан реализует целенаправленную политику, которая направлена на формирование конкурентных достоинств национальных экономических систем на базе действенного использования всех видов интеллектуальных ресурсов и высоких технологий. Данные ЦСУ Азербайджана говорят о том, что промышленность имеет свыше двух тысяч субъектов предпринимательства и порядка 18 тысяч индивидуальных предпринимателей, которые заняты в промышленной деятельности [2].

Глобализация, будучи объективной тенденцией развития человеческой цивилизации, открывает дополнительные возможности и сулит немалые выгоды отдельным странам. Благодаря этому объективному процессу достигается экономия на издержках производства, оптимизируется размещение ресурсов в мировом масштабе, расширяется ассортимент и повышается качество товаров на национальных рынках, становятся широко доступными достижения науки, техники и культуры [1].

Как и для любой отрасли в экономике машиностроительная отрасль Азербайджана подвержена ряду рисков.

На устойчивость развития секторов экономики страны влияет полнота и корректность учета рисков при оценке и прогнозировании результатов хозяйственной деятельности таких предприятий.

Управление рисками сводится к тому, чтобы нивелировать их влияние на проект, а в идеале – полностью убрать потенциальную проблему из проекта.

В литературе по управлению проектами чаще всего описываются четыре стратегии работы с рисками: уклонение, передача, принятие и снижение.

**Уклонение от риска.** Эта стратегия состоит в полном исключении воздействия риска на проект за счет изменений характера проекта или плана управления проектом. Некоторые риски, возникающие на ранних стадиях проекта, например из-за отсутствия четкого определения требований Заказчика, можно избежать, затратив дополнительное время и увеличив трудозатраты на их выявление. Однако стратегия уклонения не может полностью исключить риск.

**Передача риска.** Стратегия передачи также исключает угрозу риска путем передачи негативных последствий с ответственностью за реагирование на третью сторону. Передача риска обычно сопровождается выплатой премии за риск стороне, принимающей на себя риск и ответственность за его управление. Сам риск при этом не устраняется. Условия передачи ответственности за определенные риски третьей стороне могут определяться в контракте. Для IT-проектов третьей стороной может выступать консалтинговая компания, на которую возлагается ответственность по управлению рисками.

**Принятие риска.** Стратегия означает решение команды не уклоняться от риска. При пассивном принятии команда ничего не предпринимает в отношении риска и в случае его возникновения разрабатывает способ его обхода или исправления последствий. При активном принятии план действий разрабатывается до того, как риск может произойти, и называется планом действий в непредвиденных обстоятельствах.

**Снижение риска.** Стратегия предполагает усилие, направленное на понижение вероятности и/или последствий риска до приемлемых пределов. В стратегии снижения используется включение в план проекта дополнительной работы, которая будет выполняться независимо от возникновения риска, как, например, проведение дополнительного тестирования функциональности информационной системы, разработка прототипа системы, дополнительное подключение к работе опытных сотрудников [9].

Необходимо выявить как можно больше ранних опасностей, назначить каждой из них приоритет и начать снижать эти риски, пока проект остается относительно гибким.

Хорошая оценка рисков не является второстепенной задачей, и ее следует проводить заблаговременно, часто и на протяжении каждого этапа цикла разработки устройства. Вместо того чтобы использовать только один инструмент оценки рисков, необходимо объединить имеющиеся в распоряжении инструменты в мощную и эффективную методологию снижения рисков, чтобы выявлять и сокращать больше проблем на ранних этапах цикла. Регулярная оценка рисков с использованием нескольких инструментов на протяжении всего жизненного цикла продукта повысит безопасность продукта, сократит время вывода продукта на рынок и поможет устранить дорогостоящие отзывы.

В современных условиях проблема выживания компаний, сохранения и обеспечения их дальнейшего развития приобрела особую актуальность. Кризис охватил не только отдельные предприятия, но и целые отрасли. К наиболее пострадавшим, в частности, относится автомобилестроение. Банкротство Chrysler и проблемы Opel служат тому

наглядными примерами. В связи с этим резко усилился интерес к решениям, позволяющим повысить выживаемость хозяйствующих субъектов в экстремальных экономических условиях.

Кризис высветил ключевую проблему – несовершенство управления рисками во всех аспектах: концептуальных, методологических, управленческих, технологических, организационных. Например, у 47% компаний – машиностроительной отрасли в мире – отсутствуют системы управления рисками, что говорит о недостаточном внимании их владельцев и менеджмента к сохранению бизнеса, а также о склонности к краткосрочным деловым стратегиям и патерналистским настроениям

Азербайджанское машиностроение до недавних пор больше выигрывало от глобализации, так как оно нуждается в свободных рынках. Но по мере роста протекционизма предприниматели из Азербайджана стали терять свои доли во многих странах. Пошлины, импортные лицензии, технические регламенты и меры по стимулированию экспорта из других государств – всё это оказывает губительное влияние на компании.

Из-за торговых ограничений азербайджанские машиностроители теряют доли рынка по всему миру.

Эксперты констатируют, что глобальный протекционизм растёт. Азербайджанское же машиностроение с его экспортной квотой очень сильно зависит от наличия свободных рынков, а их становится всё меньше.

При этом странами используются не только классические ограничительные меры, такие как пошлины, импортные лицензии и технические регламенты. Также распространена практика стимулирования экспорта, когда определённым государствам предоставляются налоговые послабления или безвозвратная финансовая помощь. Это даёт им огромные преимущества над конкурентами из Азербайджана.

Происходящее коснулось азербайджанских машиностроителей, которые до этого больше всех выиграли от глобализации, на всех важных экспортных рынках, то есть в Китае, США, России и даже в странах ЕС. Им приходится конкурировать с продукцией, экспортные продажи которой стимулируются. Больше же всего ограничений вводят развивающиеся страны, так как хотят усилить собственную промышленность.

Сегодня существуют риски вытеснения производителей тяжелого оборудования с рынка Азербайджана, что влечет за собой опасность полного исчезновения отечественного нефтяного машиностроения и возникновения тотальной зависимости добывающих и перерабатывающих отраслей от поставок зарубежного оборудования [6].

В случае снижения конкурентоспособности или исчезновения с рынка продукции нефтяного машиностроения, уровень монополизма со стороны иностранных поставщиков на рынке резко вырастет, что обязательно будет причиной увеличения цены приобретения и обслуживания основных фондов сырьевых отраслей на десятки процентов. Все это причинит тяжёлый удар по производительности сырьевых отраслей, то есть по внешнеторговому балансу, по бюджетным поступлениям, фактически – по экономике страны в целом.

Добиться снижения рисков, связанных с бизнес-процессами производства продукции, повысить устойчивость этих бизнес-процессов, сохранить и продвигать имидж организаций, своевременно и согласованно устранять реальные и предотвращать потенциальные угрозы можно путем интеграции автоматизированных систем управления производством и бухгалтерской отчетности с системой управления рисками на базе

процессно-ориентированного подхода, в том числе с учетом требований непрерывности производства. Как ожидается, это снизит внеплановые потери при производстве продукции в машиностроительной отрасли, а также повысит качество и оперативность управления бизнес-процессами.

Таким образом, мировую экономику, в том числе азербайджанскую, ожидает достаточно длительный тяжелый период. Необходимо с наименьшими потерями пройти его и быть готовыми эффективно развиваться после окончания кризиса. Для этого, вне всякого сомнения, требуется управлять рисками и уметь делать это в сложных условиях.

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## **RISK MANAGEMENT IN THE CONDITIONS OF GLOBALIZATION ON THE EXAMPLE MACHINE-BUILDING INDUSTRY OF AZERBAIJAN**

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### **ABSTRACT**

One of the key processes in the development of the world economy of the 21st century is progressive globalization, i.e., a qualitatively new stage in the development of the internationalization of economic life.

The article examines the modern ways of development of the machine-building industry of Azerbaijan in global conditions, as well as the importance of risk management, their assessment and monitoring of the development of machine-building enterprises to increase competitiveness to achieve a synergistic effect through integration, increase its efficiency in the development of machine-building enterprises. In turn, all this will allow them to master the latest technologies, increase the return on capital and their competitiveness in global markets.

The purpose of the study of this work is to consider the main aspects of the implementation of the concept of risk management by developing ways to increase the effectiveness of risk management in relation to the integration policy of enterprises in the machine-building complex.

All areas of economic activity are subject to risk, and risk management improves predictability and certainty, which gives a sense of confidence in certain situations.

**Keywords:** Globalization, engineering industry, economics, risk management.

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The manuscript should contain an abstract within 300 words. The manuscript should have a self-contained, citation-free abstract and state briefly the purpose of the research, methodology, key results and major conclusions. Abstract should be in a single paragraph with running sentences. Do not use any subheading or point list within the abstract. Also, non-standard or uncommon abbreviations should be avoided, but if essential they must be defined at their first mention in the abstract itself.

**Keywords:** Authors are advised to write 3-5 keywords related to the article, separated by comma. These keywords will be used for indexing purpose.

## SUMMARY (OPTIONAL) (Times New Roman, 12 Bold)

[This section of the manuscript is optional. It is up to the author(s) to decide whether to include this section in the manuscript.]

["Summary" of your work is a short description of the work being presented in your article. It is longer than the "Abstract" which is limited to 250 words for all types of articles. After reading the "Summary" a reader should be able to understand the background information, why the work is being reported, what the significant results are, and what may be the explanation for the results.]

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- Only give the significant results of your study and give their possible explanation.
- Do not compare your results with other studies.
- Do not give references in the "Summary" section. First reference should start in main text of your manuscript from the "Introduction" section.

### **Introduction** (Times New Roman, 12)

Mostly Papers starts with introduction. It contains the brief idea of work, requirement for this research work, problem statement, and Authors contribution towards their research. Sufficient recent reference citation [1] from last 2 years should be included for showing the existing challenges and importance of current work. This section should be succinct, with no subheadings unless unavoidable [2, 3]. State the objectives of the work and provide an adequate background related to your work, avoiding a detailed literature survey or a summary of the results.

### **Research Methodology** (Times New Roman, 12)

This part should contain sufficient detail to reproduce reported data. It can be divided into subsections if several methods are described. Methods already published should be indicated by a reference [4], only relevant modifications should be described. Methodology should be written concisely in detail by maintaining continuity of the texts.

### **Theory and Calculation** (Times New Roman, 12)

A Theory section should extend, not repeat, the background to the article already dealt with in the Introduction and lay the foundation for further work. In contrast, a Calculation section represents a practical development from a theoretical basis. Do not add extensive basic definitions or well-known theories, instead highlight theoretical background and its specific usages in view of your work only.

### **Mathematical Expressions and Symbols** (Times New Roman, 12)

Mathematical expressions and symbols should be inserted using **equation tool** of Microsoft word. References may be added for used equations to support its authenticity, e.g. this result has been analysed using Fourier series [5].

$$f(x) = a_0 + \sum_{n=1}^{\infty} \left( a_n \cos \frac{n\pi x}{L} + b_n \sin \frac{n\pi x}{L} \right) \quad (1)$$

### **Results and Discussion** (Times New Roman, 12)

This section may each be divided by subheadings or may be combined. A combined Results and Discussion section is often appropriate. This should explore the significance of the results of the work, don't repeat them. Avoid extensive citations and discussion of published literature only, instead discuss recent literature for comparing your work to highlight novelty of the work in view of recent development and challenges in the field.

### **Preparation of Figures and Tables** (Times New Roman, 12)

Authors are supposed to embed all figures and tables at appropriate place within manuscript. Figures and tables should neither be submitted in separate files nor add at the end of manuscript. Figures and Tables should be numbered properly with descriptive title. Each Figure/Table must be explained within the text by referring to corresponding figure/table number. Any unexplained or unnumbered Figure/Table may cause rejection of the paper without being reviewed.

### Formatting Tables (Times New Roman, 12)

Table should be prepared using table tool within the Microsoft Word and cited consecutively in the text. Every table must have a descriptive title and if numerical measurements are given, the units should be included in the column heading. Formatting requirements have been summarized in Table 1.

**Table 1:** Summary of formatting requirements for submitting paper in this journal. (Times New Roman, 12)

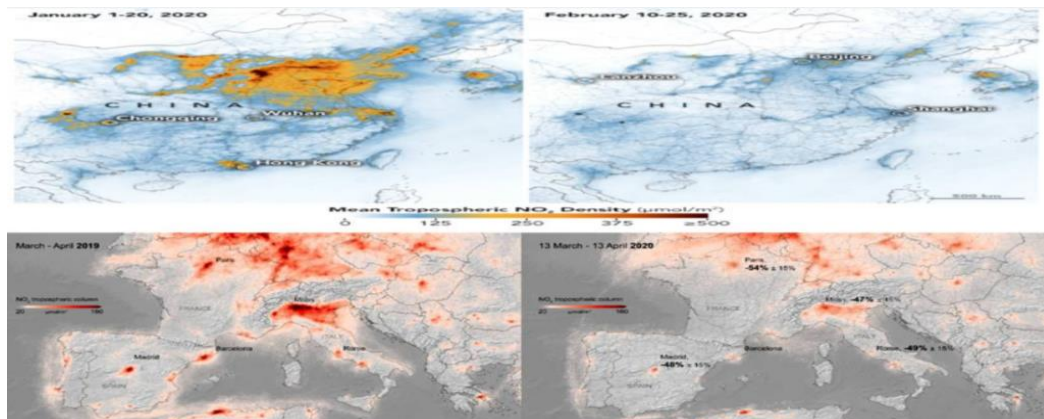
|               |  |  |  |                                   |                            |
|---------------|--|--|--|-----------------------------------|----------------------------|
| Layout        | <b>Size</b>                            | <b>Margin (Normal)</b>                     | Header                                     | Footer                            |                            |
| Single column | A4 (8.27" X 11.69")                    | Top=1"<br>Bottom=1"<br>Left=1"<br>Right=1" | Do not add anything in the header          | Do not add anything in the footer |                            |
| Font          | <b>Article Title</b>                   | <b>Headings</b>                            | <b>Subheadings</b>                         | <b>Reference list</b>             | <b>Text</b>                |
|               | Times New Roman, 16 pt, Bold, centred  | Times New Roman, 11 pt, Bold, Left aligned | Times New Roman, 10 pt, Bold, Left aligned | Times New Roman, 8 pt, Justified  | Garamond, 11 pt, Justified |
| Line Spacing  | 1.15                                   | 1.15                                       | 1.15                                       | 1.15                              | 1.15                       |
| Page number   | We will format and assign page numbers |  |  |                                   |                            |

(Times New Roman, 10)

### Formatting Figures (Times New Roman, 12)

All figures should be cited in the paper in a consecutive order, author may be asked to provide separate files of the figure. Figures should be used in bitmap formats (TIFF, GIF, JPEG, etc.) with 300 dpi resolution at least unless the resolution is intentionally set to a lower level for scientific reasons. If a bitmap image has labels, the image and labels should be embedded in separate layer. Figure 1 shows the logo of AIJR Publisher.





**Figure 1:** Logo of the AIJR Publisher (Times New Roman, 12)

**Conclusions** (Times New Roman, 12)

Each manuscript should contain a conclusion section within 250-450 words which may contain the major outcome of the work, highlighting its importance, limitation, relevance, application and recommendation. Conclusion should be written in continuous manner with running sentences which normally includes main outcome of the research work, its application, limitation and recommendation. Do not use any subheading, citation, references to other part of the manuscript, or point list within the conclusion.

**Declarations** (Times New Roman, 12)

**Study Limitations** (Times New Roman, 12)

Provide all possible limitation faced in the study which might significantly affect research outcome, If not applicable write, none.

**Acknowledgements** (Times New Roman, 12)

All acknowledgments (if any) should be included in a separate section before the references and may include list of peoples who contributed to the work in the manuscript but not listed in the author list.

**Funding source** (Times New Roman, 12)

Provide funding source, supporting grants with grant number. The name of funding agencies should be written in full, if no funding source exist, write, none.

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Declare any potential conflict of interest exist in this publication.

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If the work involves the use of human/animal subjects, each manuscript should contain the following subheadings under the declarations section-

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Provide ethical approval authority name with the reference number. If ethical approval is not required, provide an ethical exemption letter of not required. The author should send scan copy (in pdf) of the ethical approval/exemption letter obtained from IRB/ethical committee or institutional head.

### **Informed Consent** (Times New Roman, 12)

Write a statement of informed consent taken from the participants to publish this research work. The editor may ask to upload scan copy if required.

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Author(s) are responsible for ensuring that the information in each reference is complete and accurate. **Do not use grey literature (unauthentic website, news portal, social media, Wikipedia etc) as reference, only scholarly literature (Journal, online books, proceedings, patents, authentic websites with permanent archival policy) are acceptable references.** Author should include sufficient recent (last 2 years) references in the article. All references must be numbered consecutively and citations of references in the text should be identified using numbers in square brackets (e.g., “as explained by AIJR [1]”; “as discussed in many reports [2]-[6]”). All references should be cited within the text correctly; do not add only list of references without citation within the text. All cited references should be listed after declarations section in the following style-

1. W. S. Author, “Title of paper,” Name of Journal in italic, vol. x, no. x, pp. xxx-xxx, Abbrev. Month, year. <https://doi.org/10.21467/ajgr>
2. Bahishti, “Peer Review; Critical Process of a Scholarly Publication”, J. Mod. Mater., vol. 2, no. 1, pp. 1.1-1.2, Oct. 2016. <https://doi.org/10.21467/jmm.2.1.1.1-1.2>
3. Bahishti, “A New Multidisciplinary Journal; International Annals of Science”, Int. Ann. Sci., vol. 1, no. 1, pp. 1.1-1.2, Feb. 2017. <https://journals.aijr.in/index.php/ias/article/view/163>
4. W. S. Author, “Title of paper,” Name of Journal in italic, vol. x, no. x, pp. xxx-xxx, Abbrev. Month, year. Access online on 20 March 2018 at <https://www.aijr.in/journal-list/advanced-journal-graduate-research/>
5. W. S. Author, “Title of paper,” Name of Journal in italic, vol. x, no. x, pp. xxx-xxx, Abbrev. Month, year. Access online on 5 March 2018 at <https://www.aijr.in/about/publication-ethics/>
6. M. Ahmad, “Importance of Modeling and Simulation of Materials in Research”, J. Mod. Sim. Mater., vol. 1, no. 1, pp. 1-2, Jan. 2018. DOI: <https://doi.org/10.21467/jmsm.1.1.1-2>

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