

European Scientific Journal, *ESJ*

March 2024

European Scientific Institute, ESI

The content is peer reviewed

ESJ Humanities

March 2024 edition vol. 20, No. 11

The content of this journal do not necessarily reflect the opinion or position of the European Scientific Institute. Neither the European Scientific Institute nor any person acting on its behalf is responsible for the use of the information contained in this publication.

ISSN: 1857-7431 (Online)

ISSN: 1857-7881 (Print)

Generativity is a Core Value of the ESJ: A Decade of Growth

Erik Erikson (1902-1994) was one of the great psychologists of the 20th century¹. He explored the nature of personal human identity. Originally named Erik Homberger after his adoptive father, Dr. Theodore Homberger, he re-imagined his identity and re-named himself Erik Erikson (literally Erik son of Erik). Ironically, he rejected his adoptive father's wish to become a physician, never obtained a college degree, pursued independent studies under Anna Freud, and then taught at Harvard Medical School after emigrating from Germany to the United States. Erickson visualized human psychosocial development as eight successive life-cycle challenges. Each challenge was framed as a struggle between two outcomes, one desirable and one undesirable. The first two early development challenges were 'trust' versus 'mistrust' followed by 'autonomy' versus 'shame.' Importantly, he held that we face the challenge of **generativity** versus **stagnation in middle life**. This challenge concerns the desire to give back to society and leave a mark on the world. It is about the transition from acquiring and accumulating to providing and mentoring.

Founded in 2010, the European Scientific Journal is just reaching young adulthood. Nonetheless, **generativity** is one of our core values. As a Journal, we reject stagnation and continue to evolve to meet the needs of our contributors, our reviewers, and the academic community. We seek to innovate to meet the challenges of open-access academic publishing. For us,

¹ Hopkins, J. R. (1995). Erik Homburger Erikson (1902–1994). *American Psychologist*, 50(9), 796-797. doi:<http://dx.doi.org/10.1037/0003-066X.50.9.796>

generativity has a special meaning. We acknowledge an obligation to give back to the academic community, which has supported us over the past decade and made our initial growth possible. As part of our commitment to generativity, we are re-doubling our efforts in several key areas. First, we are committed to keeping our article processing fees as low as possible to make the ESJ affordable to scholars from all countries. Second, we remain committed to fair and agile peer review and are making further changes to shorten the time between submission and publication of worthy contributions. Third, we are looking actively at ways to eliminate the article processing charges for scholars coming from low GDP countries through a system of subsidies. Fourth, we are examining ways to create and strengthen partnerships with various academic institutions that will mutually benefit those institutions and the ESJ. Finally, through our commitment to publishing excellence, we reaffirm our membership in an open-access academic publishing community that actively contributes to the vitality of scholarship worldwide.

Sincerely,

Daniel B. Hier, MD

European Scientific Journal (ESJ) Natural/Life/Medical Sciences

Editor in Chief

International Editorial Board

Jose Noronha Rodrigues,
University of the Azores, Portugal

Nino Kemertelidze,
Grigol Robakidze University, Georgia

Jacques de Vos Malan,
University of Melbourne, Australia

Franz-Rudolf Herber,
University of Saarland, Germany

Annalisa Zanola,
University of Brescia, Italy

Robert Szucs,
University of Debrecen, Hungary

Dragica Vujadinovic,
University of Belgrade, Serbia

Pawel Rozga,
Technical University of Lodz, Poland

Mahmoud Sabri Al-Asal,
Jadara University, Irbid-Jordan

Rashmirekha Sahoo,
Melaka-Manipal Medical College, Malaysia

Georgios Vousinas,
University of Athens, Greece

Asif Jamil,
Gomal University DIKhan, KPK, Pakistan

Faranak Seyyedi,
Azad University of Arak, Iran

Abe N'Doumy Noel,
International University of Social Sciences Hampate-Ba (IUSS-HB) Abidjan RCI, Ivory
Coast

Majid Said Al Busafi,
Sultan Qaboos University- Sultanate of Oman

Dejan Marolov,
European Scientific Institute, ESI

Noor Alam,
Universiti Sains Malaysia, Malaysia

Rashad A. Al-Jawfi,
Ibb University, Yemen

Muntean Edward Ioan,
University of Agricultural Sciences and Veterinary Medicine (USAMV) Cluj-Napoca,
Romania

Hans W. Giessen,
Saarland University, Saarbrucken, Germany

Frank Bezzina,
University of Malta, Malta

Monika Bolek,
University of Lodz, Poland

Robert N. Diotalevi,
Florida Gulf Coast University, USA

Daiva Jureviciene,
Vilnius Gediminas Technical University, Lithuania

Anita Lidaka,
Liepaja University, Latvia

Rania Zayed,
Cairo University, Egypt

Louis Valentin Mballa,
Autonomous University of San Luis Potosi, Mexico

Lydia Ferrara,
University of Naples, Italy

Byron A Brown,
Botswana Accountancy College, Botswana

Grazia Angeloni,
University “G. d’Annunzio” in Chieti, Italy

Chandrasekhar Putcha,
California State University, Fullerton, CA, USA

Cinaria Tarik Albadri,
Trinity College Dublin University, Ireland

Mahammad A. Nurmamedov,
State Pedagogical University, Azerbaijan

Henryk J. Barton,
Jagiellonian University, Poland

Assem El-Shazly,
Zagazig University, Egypt

Saltanat Meiramova,
S.Seifullin AgroTechnical University, Kazakhstan

Rajasekhar Kali Venkata,
University of Hyderabad, India

Ruzica Loncaric,
Josip Juraj Strossmayer University of Osijek, Croatia

Stefan Vladutescu,
University of Craiova, Romania

Anna Zelenkova,
Matej Bel University, Slovakia

Billy Adamsen,
University of Southern Denmark, Denmark

Marinella Lorinzi,
University of Cagliari, Italy

Giuseppe Cataldi,
University of Naples “L’Orientale”, Italy

N. K. Rathee,
Delaware State University, USA

Michael Ba Banutu-Gomez,
Rowan University, USA

Adil Jamil,
Amman University, Jordan

Habib Kazzi,
Lebanese University, Lebanon

Valentina Manoiu,
University of Bucharest, Romania

Henry J. Grubb,
University of Dubuque, USA

Daniela Brevenikova,
University of Economics, Slovakia

Genute Gedviliene,
Vytautas Magnus University, Lithuania

Vasilika Kume,
University of Tirana, Albania

Mohammed Kerbouche,
University of Mascara, Algeria

Adriana Gherbon,
University of Medicine and Pharmacy Timisoara, Romania

Pablo Alejandro Olavegogeochea,
National University of Comahue, Argentina

Raul Rocha Romero,
Autonomous National University of Mexico, Mexico

Driss Bouyahya,
University Moulay Ismail, Morocco

William P. Fox,
Naval Postgraduate School, USA

Rania Mohamed Hassan,
University of Montreal, Canada

Tirso Javier Hernandez Gracia,
Autonomous University of Hidalgo State, Mexico

Tilahun Achaw Messaria,
Addis Ababa University, Ethiopia

George Chiladze,
University of Georgia, Georgia

Elisa Rancati,
University of Milano-Bicocca, Italy

Alessandro Merendino,
University of Ferrara, Italy

David L. la Red Martinez,
Northeastern National University, Argentina

Anastassios Gentzoglani,
University of Sherbrooke, Canada

Awoniyi Samuel Adebayo,
Solusi University, Zimbabwe

Milan Radosevic,
Faculty Of Technical Sciences, Novi Sad, Serbia

Berenyi Laszlo,
University of Miskolc, Hungary

Hisham S Ibrahim Al-Shaikhli,
Auckland University of Technology, New Zeland

Omar Arturo Dominguez Ramirez,
Hidalgo State University, Mexico

Bupinder Zutshi,
Jawaharlal Nehru University, India

Pavel Krpalek,
University of Economics in Prague, Czech Republic

Mondira Dutta,
Jawaharlal Nehru University, India

Evelio Velis,
Barry University, USA

Mahbubul Haque,
Daffodil International University, Bangladesh

Diego Enrique Baez Zarabanda,
Autonomous University of Bucaramanga, Colombia

Juan Antonio Lopez Nunez,
University of Granada, Spain

Nouh Ibrahim Saleh Alguzo,
Imam Muhammad Ibn Saud Islamic University, Saudi Arabia

Ashgar Ali Ali Mohamed,
International Islamic University, Malaysia

A. Zahoor Khan,
International Islamic University Islamabad, Pakistan

Valentina Manoiu,
University of Bucharest, Romania

Andrzej Palinski,
AGH University of Science and Technology, Poland

Jose Carlos Teixeira,
University of British Columbia Okanagan, Canada

Enkeleint - Aggelos Mechili,
National and Kapodistrian University of Athens, Greece

Martin Gomez-Ullate,
University of Extremadura, Spain

Nicholas Samaras,
Technological Educational Institute of Larissa, Greece

Emrah Cengiz,
Istanbul University, Turkey

Francisco Raso Sanchez,
University of Granada, Spain

Simone T. Hashiguti,
Federal University of Uberlandia, Brazil

Tayeb Boutbouqalt,
University, Abdelmalek Essaadi, Morocco

Maurizio Di Paolo Emilio,
University of L'Aquila, Italy

Ismail Ipek,
Istanbul Aydin University, Turkey

Olena Kovalchuk,
National Technical University of Ukraine, Ukraine

Oscar Garcia Gaitero,
University of La Rioja, Spain

Alfonso Conde,
University of Granada, Spain

Jose Antonio Pineda-Alfonso,
University of Sevilla, Spain

Jingshun Zhang,
Florida Gulf Coast University, USA

Rodrigue V. Cao Diogo,
University of Parakou, Benin

Olena Ivanova,
Kharkiv National University, Ukraine

Marco Mele,
Unint University, Italy

Okyay Ucan,
Omer Halisdemir University, Turkey

Arun N. Ghosh,
West Texas A&M University, USA

Matti Raudjarv,
University of Tartu, Estonia

Cosimo Magazzino,
Roma Tre University, Italy

Susana Sousa Machado,
Polytechnic Institute of Porto, Portugal

Jelena Zascerinska,
University of Latvia, Latvia

Umman Tugba Simsek Gursoy,
Istanbul University, Turkey

Zoltan Veres,
University of Pannonia, Hungary

Vera Komarova,
Daugavpils University, Latvia

Salloom A. Al-Juboori,
Muta'h University, Jordan

Stephane Zingue,
University of Maroua, Cameroon

Pierluigi Passaro,
University of Bari Aldo Moro, Italy

Georges Kpazai,
Laurentian University, Canada

Claus W. Turtur,
University of Applied Sciences Ostfalia, Germany

Natalia Sizochenko,
Dartmouth College, USA

Michele Russo,
University of Catanzaro, Italy

Nikolett Deutsch,
Corvinus University of Budapest, Hungary

Andrea Baranovska,
University of st. Cyrill and Methodius Trnava, Slovakia

Brian Sloboda,
University of Maryland, USA

Yassen Al Foteih,
Canadian University Dubai, UAE

Marisa Cecilia Tumino,
Adventista del Plata University, Argentina

Luca Scaini,
Al Akhawayn University, Morocco

Aelita Skarbaliene,
Klaipeda University, Lithuania

Oxana Bayer,
Dnipropetrovsk Oles Honchar University, Ukraine

Onyeka Uche Ofili,
International School of Management, France

Aurela Saliaj,
University of Vlora, Albania

Maria Garbelli,
Milano Bicocca University, Italy

Josephus van der Maesen,
Wageningen University, Netherlands

Claudia M. Dellafiore,
National University of Rio Cuarto, Argentina

Francisco Gonzalez Garcia,
University of Granada, Spain

Mahgoub El-Tigani Mahmoud,
Tennessee State University, USA

Daniel Federico Morla,
National University of Rio Cuarto, Argentina

Valeria Autran,
National University of Rio Cuarto, Argentina

Muhammad Hasmi Abu Hassan Asaari,
Universiti Sains, Malaysia

Angelo Viglianisi Ferraro,
Mediterranean University of Reggio Calabria, Italy

Roberto Di Maria,
University of Palermo, Italy

Delia Magherescu,
State University of Moldova, Moldova

Paul Waithaka Mahinge,
Kenyatta University, Kenya

Aicha El Alaoui,
Sultan My Slimane University, Morocco

Marija Brajčić,
University of Split, Croatia

Monica Monea,

University of Medicine and Pharmacy of Tirgu Mures, Romania

Belen Martinez-Ferrer,

Univeristy Pablo Olavide, Spain

Rachid Zammar,

University Mohammed 5, Morocco

Fatma Koc,

Gazi University, Turkey

Calina Nicoleta,

University of Craiova, Romania

Shadaan Abid,

UT Southwestern Medical Center, USA

Sadik Madani Alaoui,

Sidi Mohamed Ben Abdellah University, Morocco

Patrizia Gazzola,

University of Insubria, Italy

Krisztina Szegedi,

University of Miskolc, Hungary

Liliana Esther Mayoral,

National University of Cuyo, Argentina

Amarjit Singh,

Kurukshetra University, India

Oscar Casanova Lopez,

University of Zaragoza, Spain

Emina Jerkovic,

University of Josip Juraj Strossmayer, Croatia

Carlos M. Azcoitia,

National Louis University, USA

Rokia Sanogo,

University USTTB, Mali

Bertrand Lemennicier,

University of Paris Sorbonne, France

Lahcen Benaabidate,
University Sidi Mohamed Ben Abdellah, Morocco

Janaka Jayawickrama,
University of York, United Kingdom

Kiluba L. Nkulu,
University of Kentucky, USA

Oscar Armando Esparza Del Villar,
University of Juarez City, Mexico

George C. Katsadoros,
University of the Aegean, Greece

Elena Gavrilova,
Plekhanov University of Economics, Russia

Eyal Lewin,
Ariel University, Israel

Szczepan Figiel,
University of Warmia, Poland

Don Martin,
Youngstown State University, USA

John B. Strait,
Sam Houston State University, USA

Nirmal Kumar Betchoo,
University of Mascareignes, Mauritius

Camilla Buzzacchi,
University Milano Bicocca, Italy

EL Kandoussi Mohamed,
Moulay Ismai University, Morocco

Susana Borrás Pentinat,
Rovira i Virgili University, Spain

Jelena Kasap,
Josip J. Strossmayer University, Croatia

Massimo Mariani,
Libera Università Mediterranea, Italy

Rachid Sani,
University of Niamey, Niger

Luis Aliaga,
University of Granada, Spain

Robert McGee,
Fayetteville State University, USA

Angel Urbina-Garcia,
University of Hull, United Kingdom

Sivanadane Mandjiny,
University of N. Carolina at Pembroke, USA

Marko Andonov,
American College, Republic of Macedonia

Ayub Nabi Khan,
BGMEA University of Fashion & Technology, Bangladesh

Leyla Yilmaz Findik,
Hacettepe University, Turkey

Vlad Monescu,
Transilvania University of Brasov, Romania

Stefano Amelio,
University of Unsubria, Italy

Enida Pulaj,
University of Vlora, Albania

Christian Cave,
University of Paris XI, France

Julius Gathogo,
University of South Africa, South Africa

Claudia Pisoschi,
University of Craiova, Romania

Arianna Di Vittorio,
University of Bari "Aldo Moro", Italy

Joseph Ntale,
Catholic University of Eastern Africa, Kenya

Kate Litondo,
University of Nairobi, Kenya

Maurice Gning,
Gaston Berger University, Senegal

Katarina Marosevic,
J.J. Strossmayer University, Croatia

Sherin Y. Elmahdy,
Florida A&M University, USA

Syed Shadab,
Jazan University, Saudi Arabia

Koffi Yao Blaise,
University Felix Houphouet Boigny, Ivory Coast

Mario Adelfo Batista Zaldivar,
Technical University of Manabi, Ecuador

Kalidou Seydou,
Gaston Berger University, Senegal

Patrick Chanda,
The University of Zambia, Zambia

Meryem Ait Ouali,
University IBN Tofail, Morocco

Laid Benderradji,
Mohamed Boudiaf University of Msila, Algeria

Amine Daoudi,
University Moulay Ismail, Morocco

Oruam Cadex Marichal Guevara,
University Maximo Gomes Baez, Cuba

Vanya Katarska,
National Military University, Bulgaria

Carmen Maria Zavala Arnal,
University of Zaragoza, Spain

Francisco Gavi Reyes,
Postgraduate College, Mexico

Iane Franceschet de Sousa,
Federal University S. Catarina, Brazil

Patricia Randrianavony,
University of Antananarivo, Madagascar

Roque V. Mendez,
Texas State University, USA

Kesbi Abdelaziz,
University Hassan II Mohammedia, Morocco

Whei-Mei Jean Shih,
Chang Gung University of Science and Technology, Taiwan

Ilknur Bayram,
Ankara University, Turkey

Elenica Pjero,
University Ismail Qemali, Albania

Gokhan Ozer,
Fatih Sultan Mehmet Vakif University, Turkey

Veronica Flores Sanchez,
Technological University of Veracruz, Mexico

Camille Habib,
Lebanese University, Lebanon

Larisa Topka,
Irkutsk State University, Russia

Paul M. Lipowski,
Creighton University, USA

Marie Line Karam,
Lebanese University, Lebanon

Sergio Scicchitano,
Research Center on Labour Economics (INAPP), Italy

Mohamed Berradi,
Ibn Tofail University, Morocco

Visnja Lachner,
Josip J. Strossmayer University, Croatia

Sangne Yao Charles,
University Jean Lorougnon Guede, Ivory Coast

Omar Boubker,
University Ibn Zohr, Morocco

Kouame Atta,
University Felix Houphouet Boigny, Ivory Coast

Patience Mpanzu,
University of Kinshasa, Congo

Devang Upadhyay,
University of North Carolina at Pembroke, USA

Nyamador Wolali Seth,
University of Lome, Togo

Akmel Meless Simeon,
Ouattara University, Ivory Coast

Mohamed Sadiki,
IBN Tofail University, Morocco

Paula E. Faulkner,
North Carolina Agricultural and Technical State University, USA

Gamal Elgezeery,
Suez University, Egypt

Manuel Gonzalez Perez,
Universidad Popular Autonoma del Estado de Puebla, Mexico

Denis Pompidou Folefack,
Centre Africain de Recherche sur Bananiers et Plantains (CARBAP), Cameroon

Seka Yapi Arsene Thierry,
Ecole Normale Supérieure Abidjan (ENS Ivory Coast)

Dastagiri MB,
ICAR-National Academy of Agricultural Research Management, India

Alla Manga,
University Cheikh Anta Diop, Senegal

Lalla Aicha Lrhorfi,
University Ibn Tofail, Morocco

Ruth Adunola Aderanti,
Babcock University, Nigeria

Katica Kulavkova,
University of “Ss. Cyril and Methodius”, Republic of Macedonia

Aka Koffi Sosthene,
Research Center for Oceanology, Ivory Coast

Forchap Ngang Justine,
University Institute of Science and Technology of Central Africa, Cameroon

Toure Krouele,
Ecole Normale Superieure d’Abidjan, Ivory Coast

Sophia Barinova,
University of Haifa, Israel

Leonidas Antonio Cerda Romero,
Escuela Superior Politecnica de Chimborazo, Ecuador

T.M.S.P.K. Thennakoon,
University of Sri Jayewrdenepura, Sri Lanka

Aderewa Amontcha,
Universite d’Abomey-Calavi, Benin

Khadija Kaid Rassou,
Centre Regional des Metiers de l’Education et de la Formation, Morocco

Rene Mesias Villacres Borja,
Universidad Estatal De Bolivar, Ecuador

Aaron Victor Reyes Rodriguez,
Autonomous University of Hidalgo State, Mexico

Qamil Dika,
Tirana Medical University, Albania

Kouame Konan,
Peleforo Gon Coulibaly University of Korhogo, Ivory Coast

Hariti Hakim,
University Alger 3, Algeria

Emel Ceyhun Sabir,
University of Cukurova, Turkey

Salomon Barrezueta Unda,
Universidad Tecnica de Machala, Ecuador

Belkis Zervent Unal,
Cukurova University, Turkey

Elena Krupa,
Kazakh Agency of Applied Ecology, Kazakhstan

Carlos Angel Mendez Peon,
Universidad de Sonora, Mexico

Antonio Solis Lima,
Apizaco Institute Technological, Mexico

Roxana Matefi,
Transilvania University of Brasov, Romania

Bouharati Saddek,
UFAS Setif1 University, Algeria

Toleba Seidou Mamam,
Universite d'Abomey-Calavi (UAC), Benin

Serigne Modou Sarr,
Universite Alioune DIOP de Bambey, Senegal

Nina Stankous,
National University, USA

Lovergine Saverio,
Tor Vergata University of Rome, Italy

Fekadu Yehualashet Maru,
Jigjiga University, Ethiopia

Karima Laamiri,
Abdelmalek Essaadi University, Morocco

Elena Hunt,
Laurentian University, Canada

Sharad K. Soni,
Jawaharlal Nehru University, India

Lucrezia Maria de Cosmo,
University of Bari "Aldo Moro", Italy

Florence Kagendo Muindi,
University of Nairobi, Kenya

Maximo Rossi Malan,
Universidad de la Republica, Uruguay

Haggag Mohamed Haggag,
South Valley University, Egypt

Olugbamila Omotayo Ben,
Obafemi Awolowo University, Ile-Ife, Nigeria

Eveligh Ceciliana Prado-Carpio,
Technical University of Machala, Ecuador

Maria Clideana Cabral Maia,
Brazilian Company of Agricultural Research - EMBRAPA, Brazil

Fernando Paulo Oliveira Magalhaes,
Polytechnic Institute of Leiria, Portugal

Valeria Alejandra Santa,
Universidad Nacional de Río Cuarto, Córdoba, Argentina

Stefan Cristian Gherghina,
Bucharest University of Economic Studies, Romania

Goran Ilik,
"St. Kliment Ohridski" University, Republic of Macedonia

Amir Mohammad Sohrabian,
International Information Technology University (IITU), Kazakhstan

Aristide Yemmafouo,
University of Dschang, Cameroon

Gabriel Anibal Monzón,
University of Moron, Argentina

Robert Cobb Jr,
North Carolina Agricultural and Technical State University, USA

Arburim Iseni,
State University of Tetovo, Republic of Macedonia

Raoufou Pierre Radji,
University of Lome, Togo

Juan Carlos Rodriguez Rodriguez,
Universidad de Almeria, Spain

Satoru Suzuki,
Panasonic Corporation, Japan

Iulia-Cristina Muresan,
University of Agricultural Sciences and Veterinary Medicine, Romania

Russell Kabir,
Anglia Ruskin University, UK

Nasreen Khan,
SZABIST, Dubai

Luisa Morales Maure,
University of Panama, Panama

Lipeng Xin,
Xi'an Jiaotong University, China

Harja Maria,
Gheorghe Asachi Technical University of Iasi, Romania

Adou Paul Venance,
University Alassane Ouattara, Cote d'Ivoire

Nkwenka Geoffroy,
Ecole Superieure des Sciences et Techniques (ESSET), Cameroon

Benie Aloh J. M. H.,
Felix Houphouet-Boigny University of Abidjan, Cote d'Ivoire

Bertin Desire Soh Fotsing,
University of Dschang, Cameroon

N'guessan Tenguel Sosthene,
Nangui Abrogoua University, Cote d'Ivoire

Ackoundoun-Nguessan Kouame Sharll,
Ecole Normale Superieure (ENS), Cote d'Ivoire

Abdelfettah Maouni,
Abdelmalek Essaadi University, Morocco

Alina Stela Resceanu,
University of Craiova, Romania

Alilouch Redouan,
Chouaib Doukkali University, Morocco

Gnamien Konan Bah Modeste,
Jean Lorougnon Guede University, Cote d'Ivoire

Sufi Amin,
International Islamic University, Islambad Pakistan

Sanja Milosevic Govedarovic,
University of Belgrade, Serbia

Elham Mohammadi,
Curtin University, Australia

Andrianarizaka Marc Tiana,
University of Antananarivo, Madagascar

Ngakan Ketut Acwin Dwijendra,
Udayana University, Indonesia

Yue Cao,
Southeast University, China

Audrey Tolouian,
University of Texas, USA

Asli Cazorla Milla,
Centro de Estudios Universitarios Madrid, Spain

Valentin Marian Antohi,
University Dunarea de Jos of Galati, Romania

Tabou Talahatou,
University of Abomey-Calavi, Benin

N. K. B. Raju,
Sri Venkateswara Veterinary University, India

Hamidreza Izadi,
Chabahar Maritime University, Iran

Hanaa Ouda Khadri Ahmed Ouda,
Ain Shams University, Egypt

Rachid Ismaili,
Hassan 1 University, Morocco

Tamar Ghutidze,
Ivane Javakhishvili Tbilisi State University, Georgia

Emine Koca,
Ankara Haci Bayram Veli University, Turkey

David Perez Jorge,
University of La Laguna, Spain

Irma Guga,
European University of Tirana, Albania

Jesus Gerardo Martínez del Castillo,
University of Almeria, Spain

Mohammed Mouradi,
Sultan Moulay Slimane University, Morocco

Marco Tulio Ceron Lopez,
Institute of University Studies, Mexico

Mangambu Mokoso Jean De Dieu,
University of Bukavu, Congo

Hadi Sutopo,
Topazart, Indonesia

Priyantha W. Mudalige,
University of Kelaniya, Sri Lanka

Emmanouil N. Choustoulakis,
University of Peloponnese, Greece

Yasangi Anuradha Iddagoda,
Chartered Institute of Personal Management, Sri Lanka

Pinnawala Sangasumana,
University of Sri Jayewardenepura, Sri Lanka

Abdelali Kaaouachi,
Mohammed I University, Morocco

Kahi Oulai Honore,
University of Bouake, Cote d'Ivoire

Ma'moun Ahmad Habiballah,
Al Hussein Bin Talal University, Jordan

Amaya Epelde Larranaga,
University of Granada, Spain

Franca Daniele,
“G. d’Annunzio” University, Chieti-Pescara, Italy

Saly Sambou,
Cheikh Anta Diop University, Senegal

Daniela Di Berardino,
University of Chieti-Pescara, Italy

Dorjana Klosi,
University of Vlore “Ismail Qemali, Albania

Abu Hamja,
Aalborg University, Denmark

Stankovska Gordana,
University of Tetova, Republic of Macedonia

Kazimierz Albin Klosinski,
John Paul II Catholic University of Lublin, Poland

Maria Leticia Bautista Diaz,
National Autonomous University, Mexico

Bruno Augusto Sampaio Fuga,
North Parana University, Brazil

Anouar Alami,
Sidi Mohammed Ben Abdellah University, Morocco

Vincenzo Riso,
University of Ferrara, Italy

Janhavi Nagwekar,
St. Michael’s Hospital, Canada

Jose Grillo Evangelista,
Egas Moniz Higher Institute of Health Science, Portugal

Xi Chen,
University of Kentucky, USA

Fateh Mebarek-Oudina,
Skikda University, Algeria

Nadia Mansour,
University of Sousse, Tunisia

Jestoni Dulva Maniago,
Majmaah University, Saudi Arabia

Daniel B. Hier,
Missouri University of Science and Technology, USA

S. Sendil Velan,
Dr. M.G.R. Educational and Research Institute, India

Enriko Ceko,
Wisdom University, Albania

Laura Fischer,
National Autonomous University of Mexico, Mexico

Mauro Berumen,
Caribbean University, Mexico

Sara I. Abdelsalam,
The British University in Egypt, Egypt

Maria Carlota,
Autonomous University of Queretaro, Mexico

H.A. Nishantha Hettiarachchi,
University of Sri Jayewardenepura, Sri Lanka

Bhupendra Karki,
University of Louisville, Louisville, USA

Evens Emmanuel,
University of Quisqueya, Haiti

Iresha Madhavi Lakshman,
University of Colombo, Sri Lanka

Francesco Scotognella,
Polytechnic University of Milan, Italy

Kamal Niaz,
Cholistan University of Veterinary & Animal Sciences, Pakistan

Rawaa Qasha,
University of Mosul, Iraq

Amal Talib Al-Sa'ady,
Babylon University, Iraq

Hani Nasser Abdelhamid,
Assiut University, Egypt

Mihnea-Alexandru Gaman,
University of Medicine and Pharmacy, Romania

Daniela-Maria Cretu,
Lucian Blaga University of Sibiu, Romania

Ilenia Farina,
University of Naples "Parthenope, Italy

Luisa Zanolla,
Azienda Ospedaliera Universitaria Verona, Italy

Jonas Kwabla Fiadzawoo,
University for Development Studies (UDS), Ghana

Adriana Burlea-Schiopoiu,
University of Craiova, Romania

Alejandro Palafox-Munoz,
University of Quintana Roo, Mexico

Fernando Espinoza Lopez,
Hofstra University, USA

Ammar B. Altemimi,
University of Basrah, Iraq

Monica Butnariu,
University of Agricultural Sciences and Veterinary Medicine "King Michael I, Romania

Davide Calandra,
University of Turin, Italy

Nicola Varrone,
University of Campania Luigi Vanvitelli, Italy

Luis Angel Medina Juarez,
University of Sonora, Mexico

Francesco D. d'Ovidio,
University of Bari "Aldo Moro", Italy

Sameer Algburi,
Al-Kitab University, Iraq

Braione Pietro,
University of Milano-Bicocca, Italy

Mounia Bendari,
Mohammed VI University, Morocco

Stamatios Papadakis,
University of Crete, Greece

Aleksey Khlopytskyi,
Ukrainian State University of Chemical Technology, Ukraine

Sung-Kun Kim,
Northeastern State University, USA

Nemanja Berber,
University of Novi Sad, Serbia

Krejsa Martin,
Technical University of Ostrava, Czech Republic

Magdalena Vaverkova,
Mendel University in Brno, Czech Republic

Jeewaka Kumara,
University of Peradeniya, Sri Lanka

Antonella Giacosa,
University of Torino, Italy

Paola Clara Leotta,
University of Catania, Italy

Francesco G. Patania,
University of Catania, Italy

Rajko Odobasa,
University of Osijek, Faculty of Law, Croatia

Jesusa Villanueva-Gutierrez,
University of Tabuk, Tabuk, KSA

Leonardo Jose Mataruna-Dos-Santos,
Canadian University of Dubai, UAE

Usama Konbr,
Tanta University, Egypt

Branislav Radeljic,
Necmettin Erbakan University, Turkey

Anita Mandaric Vukusic,
University of Split, Croatia

Barbara Cappuzzo,
University of Palermo, Italy

Roman Jimenez Vera,
Juarez Autonomous University of Tabasco, Mexico

Lucia P. Romero Mariscal,
University of Almeria, Spain

Pedro Antonio Martin-Cervantes,
University of Almeria, Spain

Hasan Abd Ali Khudhair,
Southern Technical University, Iraq

Qanqom Amira,
Ibn Zohr University, Morocco

Farid Samir Benavides Vanegas,
Catholic University of Colombia, Colombia

Nedret Kuran Burcoglu,
Emeritus of Bogazici University, Turkey

Julio Costa Pinto,
University of Santiago de Compostela, Spain

Satish Kumar,
Dire Dawa University, Ethiopia

Favio Farinella,
National University of Mar del Plata, Argentina

Jorge Tenorio Fernando,
Paula Souza State Center for Technological Education - FATEC, Brazil

Salwa Alinat,
Open University, Israel

Hamzo Khan Tagar,
College Education Department Government of Sindh, Pakistan

Rasool Bukhsh Mirjat,
Senior Civil Judge, Islamabad, Pakistan

Samantha Goncalves Mancini Ramos,
Londrina State University, Brazil

Mykola Nesprava,
Dnoproterovsk State University of Internal Affairs, Ukraine

Awwad Othman Abdelaziz Ahmed,
Taif University, Kingdom of Saudi Arabia

Giacomo Buoncompagni,
University of Florence, Italy

Elza Nikoleishvili,
University of Georgia, Georgia

Mohammed Mahmood Mohammed,
University of Baghdad, Iraq

Oudgou Mohamed,
University Sultan Moulay Slimane, Morocco

Arlinda Ymeraj,
European University of Tirana, Albania

Luisa Maria Arvide Cambra,
University of Almeria, Spain

Charahabil Mohamed Mahamoud,
University Assane Seck of Ziguinchor, Senegal

Ehsaneh Nejad Mohammad Nameghi,
Islamic Azad University, Iran
Mohamed Elsayed Elnaggar,
The National Egyptian E-Learning University , Egypt

Said Kammas,
Business & Management High School, Tangier, Morocco

Harouna Issa Amadou,
Abdou Moumouni University of Niger

Achille Magloire Ngah,
Yaounde University II, Cameroun

Gnagne Agness Essoh Jean Eudes Yves,
Universite Nangui Abrogoua, Cote d'Ivoire

Badoussi Marius Eric,
Université Nationale des sciences, Technologies,
Ingénierie et Mathématiques (UNSTIM) , Benin

Carlos Alberto Batista Dos Santos,
Universidade Do Estado Da Bahia, Brazil

Oumar Bah,
Sup' Management, Mali

Angelica Selene Sterling Zozoaga,
Universidad del Caribe, Mexico

Josephine W. Gitome,
Kenyatta University, Kenya

Keumean Keiba Noel,
Felix Houphouet Boigny University Abidjan, Ivory Coast

Tape Bi Sehi Antoine,
University Peleforo Gon Coulibaly, Ivory Coast

Atsé Calvin Yapi,
Université Alassane Ouattara, Côte d'Ivoire

Desara Dushi,
Vrije Universiteit Brussel, Belgium

Mary Ann Hollingsworth,
University of West Alabama, Liberty University, USA

Aziz Dieng,
University of Portsmouth, UK

Ruth Magdalena Gallegos Torres,
Universidad Autonoma de Queretaro, Mexico

Atanga Essama Michel Barnabé,
Université de Bertoua, Cameroun

Alami Hasnaa,
Universite Chouaid Doukkali, Maroc

Emmanuel Acquah-Sam,

Wisconsin International University College, Ghana

Fabio Pizzutilo,
University of Bari "Aldo Moro", Italy

Hicham Chairi,
Abdelmalek Essaadi University, Morocco

Noureddine El Aouad,
University Abdelmalek Essaady, Morocco

Samir Diouny,
Hassan II University, Casablanca, Morocco

Gibet Tani Hicham,
Abdelmalek Essaadi University, Morocco

Anoua Adou Serge Judicael,
Université Alassane Ouattara, Côte d'Ivoire

Abderrahim Ayad,
Abdelmalek Essaadi University, Morocco

Sara Teidj,
Moulay Ismail University Meknes, Morocco

Gbadamassi Fousséni,
Université de Parakou, Benin

Bouyahya Adil,
Centre Régional des Métiers d'Education et de Formation, Maroc

Haounati Redouane,
Ibn Zohr Agadir, Morocco

Hicham Es-soufi,
Moulay Ismail University, Morocco

Imad Ait Lhassan,
Abdelmalek Essaâdi University, Morocco

Givi Makalatia,
Ivane Javakhishvili Tbilisi State University, Georgia

Adil Brouri,
Moulay Ismail University, Morocco

Noureddine El Baraka,
Ibn Zohr University, Morocco

Ahmed Aberqi,
Sidi Mohamed Ben Abdellah University, Morocco

Oussama Mahboub,
Queens University, Kingston, Canada

Markela Muca,
University of Tirana, Albania

Tessougue Moussa Dit Martin,
Université des Sciences Sociales et de Gestion de Bamako, Mali

Kledi Xhaxhiu,
University of Tirana, Albania

Saleem Iqbal,
University of Balochistan Quetta, Pakistan

Dritan Topi,
University of Tirana, Albania

Dakouri Guissa Desmos Francis,
Université Félix Houphouët Boigny, Côte d'Ivoire

Adil Youssef Sayeh,
Chouaib Doukkali University, Morocco

Zineb Tribak,
Sidi Mohammed Ben Abdellah University, Morocco

Ngwengeh Brendaline Beloke,
University of Biea, Cameroon

El Agy Fatima,
Sidi Mohamed Ben Abdelah University, Morocco

Julian Kraja,
University of Shkodra "Luigj Gurakuqi", Albania

Nato Durglishvili,
University of Georgia, Georgia

Abdelkrim Salim,
Hassiba Benbouali University of Chlef, Algeria

Omar Kchit,
Sidi Mohamed Ben Abdellah University, Morocco

Isaac Ogundu,
Ignatius Ajuru University of Education, Nigeria

Giuseppe Lanza,
University of Catania, Italy

Monssif Najim,
Ibn Zohr University, Morocco

Luan Bekteshi,
“Barleti” University, Albania

Malika Belkacemi,
Djillali Liabes, University of Sidi Bel Abbas, Algeria

Oudani Hassan,
University Ibn Zohr Agadir, Morocco

Merita Rumano,
University of Tirana, Albania

Mohamed Chiban,
Ibn Zohr University, Morocco

Tal Pavel,
The Institute for Cyber Policy Studies, Israel

Jawad Laadraoui,
University Cadi Ayyad of Marrakech, Morocco

El Mourabit Youssef,
Ibn Zohr University, Morocco

Mancer Daya,
University of Science and Technology Houari Boumediene, Algeria

Krzysztof Nesterowicz,
Ludovika-University of Public Service, Hungary

Laamrani El Idrissi Safae,
Ibn Tofail University, Morocco

Suphi Ural,
Cukurova University, Turkey

Emrah Eray Akca,
Istanbul Aydin University, Turkey

Selcuk Poyraz,
Adiyaman University, Turkey

Ocak Gurbuz,
University of Afyon Kocatepe, Turkey

Umut Sener,
Aksaray University, Turkey

Mateen Abbas,
Capital University of Science and Technology, Pakistan

Muhammed Bilgehan Aytac,
Aksaray University, Turkey

Sohail Nadeem,
Quaid-i-Azam University Islamabad, Pakistan

Salman Akhtar,
Quaid-i-Azam University Islamabad, Pakistan

Afzal Shah,
Quaid-i-Azam University Islamabad, Pakistan

Muhammad Tayyab Naseer,
Quaid-i-Azam University Islamabad, Pakistan

Asif Sajjad,
Quaid-i-Azam University Islamabad, Pakistan

Atif Ali,
COMSATS University Islamabad, Pakistan

Shahzda Adnan,
Pakistan Meteorological Department, Pakistan

Waqar Ahmed,
Johns Hopkins University, USA

Faizan ur Rehman Qaiser,
COMSATS University Islamabad, Pakistan

Choua Ouchemi,
Université de N'Djaména, Tchad

Syed Tallataf Hussain Shah,
COMSATS University Islamabad, Pakistan

Saeed Ahmed,
University of Management and Technology, Pakistan

Hafiz Muhammad Arshad,
COMSATS University Islamabad, Pakistan

Johana Hajdini,
University “G. d’Annunzio” of Chieti-Pescara, Italy

Mujeeb Ur Rehman,
York St John University, UK

Noshaba Zulfiqar,
University of Wah, Pakistan

Muhammad Imran Shah,
Government College University Faisalabad, Pakistan

Niaz Bahadur Khan,
National University of Sciences and Technology, Islamabad, Pakistan

Titilayo Olotu,
Kent State University, Ohio, USA

Kouakou Paul-Alfred Kouakou,
Université Peleforo Gon Coulibaly, Côte d'Ivoire

Sajjad Ali,
Karakoram International University, Pakistan

Hiqmet Kamberaj,
International Balkan University, Macedonia

Sanna Ullah,
University of Central Punjab Lahore, Pakistan

Khawaja Fahad Iqbal,
National University of Sciences and Technology (NUST), Pakistan

Heba Mostafa Mohamed,
Beni Suef University, Egypt

Abdul Basit,
Zhejiang University, China

Karim Iddouch,
International University of Casablanca, Morocco

Jay Jesus Molino,
Universidad Especializada de las Américas (UDELAS), Panama

Imtiaz-ud-Din,
Quaid-e-Azam University Islamabad, Pakistan

Dolantina Hyka,
Mediterranean University of Albania

Yaya Dosso,
Alassane Ouattara University, Ivory Coast

Essedaoui Aafaf,
Regional Center for Education and Training Professions, Morocco

Ahmed Aberqi,
Sidi Mohamed Ben Abdellah University, Morocco

Silue Pagadjovongo Adama,
Peleforo GON COULIBALY University, Cote d'Ivoire

Soumaya Outellou,
Higher Institute of Nursing Professions and Health Techniques, Morocco

Rafael Antonio Estevez Ramos,
Universidad Autónoma del Estado de México

Mohamed El Mehdi Saidi,
Cadi Ayyad University, Morocco

Ouattara Amidou,
University of San Pedro, Côte d'Ivoire

Murry Siyasiya,
Blantyre International University, Malawi

Benbrahim Mohamed,
Centre Regional des Métiers de l'Éducation et de la Formation d'Inezgane (CRMEF),
Morocco

Emmanuel Gitonga Gicharu,
Mount Kenya University, Kenya

Er-razine Soufiane,
Regional Centre for Education and Training Professions, Morocco

Foldi Kata,
University of Debrecen, Hungary

Elda Xhumari,
University of Tirana, Albania

Daniel Paredes Zempual,
Universidad Estatal de Sonora, Mexico

Jean Francois Regis Sindayihebura,
University of Burundi, Burundi

Luis Enrique Acosta Gonzzlez,
University of Holguin, Cuba

Table of Contents:

Hamas-Israel War: A Brief Analysis of First Two Phases of War.....1

Maria Bordas

Appraisal Theory: Can It Be Applied to Visual Images in Isolation to the Text?.....18

Bashayir AlZahrani

Mohammed Alhuthali

Politics of Secularism in Ethiopia: Repression or Co-option towards the Ethiopian Orthodox Tewahido Church?.....33

Dereje Melese Liyew

Emplois des Femmes dans les Provinces de Bujumbura et Gitega au Burundi : Quels Impacts sur les Conditions de vie des Ménages ?.....53

Jean Bosco Yamuremye

Laurent-Charles Boyomo Assala

Gothic Experiences in Jane Eyre, Wuthering Heights, and The Tenant of Wildfell Hall.....69

Etienne Pathe Tine

Expansion des Agroforêts à Cacaoyers et Afforestation des Savanes sur le Confluent Mbam-Sanaga au Centre Cameroun.....86

Mopi Touoyem Fabrice

Youta Happi

**Évaluation de l'Impact de la COVID-19 Sur la Filière Thonière au Port
d'Abidjan (Côte d'Ivoire).....102**

Dékoun Justin Hien

Koffi Mouroufié Kouman

Céline Yolande Koffie-Bikpo



Hamas-Israel War: A Brief Analysis of First Two Phases of War

Maria Bordas

Full Professor at University of Public Service Ludovika, Faculty of
Public Governance and International Studies, Budapest, Hungary

[Doi:10.19044/esj.2024.v20n11p1](https://doi.org/10.19044/esj.2024.v20n11p1)

Submitted: 08 February 2024

Accepted: 22 April 2024

Published: 30 April 2024

Copyright 2024 Author(s)

Under Creative Commons CC-BY 4.0

OPEN ACCESS

Cite As:

Bordas M. (2024). *Full Professor at University of Public Service Ludovika, Faculty of Public Governance and International Studies, Budapest, Hungary*. European Scientific Journal, ESJ, 20 (11), 1. <https://doi.org/10.19044/esj.2024.v20n11p1>

Abstract

At the end of 2023, the Middle East experienced some new challenges. Among these new challenges, one of the most important of them all is the Hamas-Israel war. After almost four months of war and no end in sight, there are now growing questions about whether Israel will be able to accomplish its stated goals in Gaza. The brutality of the Hamas's attack on October 7, the extent of the cruel massacre, shocked both the Israeli society and foreign public opinion. To better understand the factors of Hamas's operational success, the strategic surprise attack on Israel from Gaza, on October 7, 2023, needs a thorough analysis to understand all its political, intelligence, and operational failures aspects. It goes without saying that many elements of Hamas's brutal but largely successful attack are still unknown. Taking this into account, this paper focuses on only three elements of the ongoing war. Firstly, based on the qualitative methodology of research, this study evaluates and highlights the political background of the bloodiest attack in modern Israel's history which happened on October 7, 2023. Secondly, using the research methodology of data collection and analysis, this paper seeks to answer the still open-ended question, how was Hamas able to attack a country which operates one of the best intelligence organizations in the world by an extreme surprise? Finally, by using the narrative and historical models of qualitative research and the available data, this paper focuses on assessing the first and second phases of the war. Furthermore, the study formulates conclusions regarding the expected directions of change in the Israeli security system and

some aspects of regional security implications of the ongoing Hamas-Israeli conflict. The potential result of the current paper is to present the reasons for the ongoing Gaza conflict based on the historical background. In addition, it provides a primary analysis, based on currently available information, of the first two phases of the obviously protracted Hamas-Israel conflict for the benefit of the community of researchers, scholars, and academics.

Keywords: Terrorism, war in Gaza, Israel, Palestine Authorities, Palestine terrorism

Introduction

It is quite likely that international security research institutes, various practitioners of military science, experts on security issues, and think tanks dealing with the Middle East will discuss and analyze why and what happened in Israel on October 7. Furthermore, the extent to which Israel's military actions in Gaza were proportionate and in accordance with international law will also be a subject of debate. This war between IDF and Iran-backed proxy forces would have their regional and international political effects for a long time to come.

The conflict between the Arabs and Israel – although the modern Jewish state has only officially existed since 1948 – has been going on since the beginning of the 20th century in the form of clashes between the Jewish and Arab populations in British-controlled Mandatory Palestine with varying intensity on the military, political, and economic levels. It should be noted that Mandatory Palestine was divided by the United Kingdom in September 1922 into the Emirates of Transjordan and Palestine. During two decades after 1922, more than 150,000 (Morris, 2008, p.145-154) Jews emigrated from Europe into Palestine.¹

Just between 1933 and 1936, 130,000 (Morris, 2008, p. 156) Jews settled in Palestine.² The British Army's operations in Palestine during this period were mainly directed against militant Arab groups who were opposed to this mass Jewish immigration. In 1936 and 1937, the United Kingdom's army heavily fought against Arab rebel factions of the Arab Higher Committee, which was led by Hitler-fun Amin al Husayni, the Grand Mufti of Jerusalem.

The Israeli-Arab conflict became more violent after the UN partition of Mandatory Palestine (Caridi, 2023, p. 85) and the subsequent declaration

¹Benny Morris (1948). A History of the First Arab Israeli War, 2008, Yale University Press. ISBN: 9780300151121. pp. 145-154

²Benny Morris (1948). A History of the First Arab Israeli War, 2008, Yale University Press. ISBN: 9780300151121. pp. 156-158

of the Jewish state in 1948.³ Five Arab country's armies attacked Israel, and the elimination of Israel was almost evident. Interestingly, the Stalinist Soviet Union supported politically and with arms transfer from Czechoslovakia the newly born Jewish state. Stalin also accepted a limited emigration of Jews from the Soviet Union into Israel to invest in what he hoped for would be a socialist Israel. These three steps, political recognition, arms transfer, and the new wave of immigrants (Kochavi, 1998, p. 146), were lifesavers for Israel.⁴ Due to the war, around 700,000 Arabs left or were expelled from their homes.

The issue gained world political weight thanks to the Cold War, as the Soviet Union started to support the Arab states against Israel militarily, economically, and politically, which enjoyed the unconditional support of the United States of America. However, the disintegration of the bipolar world order and some ultimately ineffective peace initiatives did (Camp David, Oslo I, II.) not put an end to the conflict, in which both sides used means that are objectionable from the point of view of human rights. Therefore, the result of the conflict largely played a role in the formation of the national consciousness of the Palestinians (Khalidi, 2020, p. 138). In addition, it also helped in the forging of the diverse Jewish people coming from different European and even African countries into a nation.⁵

Methods

A combination of qualitative and quantitative approaches was used in conducting this study. Moreover, the present research was carried out using the method of data collection, analysis, systematization, induction, hypothesis creation, and deduction. To achieve the scientific goals, the present scientific work has been divided chronologically and according to cause-and-effect relationships.

Consequently, to fulfil and satisfy the scientific requirements of the dissertation, data was collected using empirical articles as secondary research sources. In many cases, data provided by governmental and well-respected news portals was taken over and this information was analyzed using comparative evaluation methods. Finally, all available confirmed information and data were incorporated into the database, categories, and subcategories. Also, manual thematic analysis was then conducted for the identification and interpretation of patterns within the data.

Literature Review

³Paola Caridi (2023). *Hamas: From Resistance to Regime*. Publisher: Seven Stories Press, NY, USA. ISBN: 9781644211892. p. 85

⁴Arieh J. Kochavi (1998). *The Struggle against Jewish Immigration to Palestine Middle Eastern Studies*, Vol. 34, No.3, July. p. 146

⁵Rashid Khalidi (2020). *The Hundred Years' War on Palestine A History of Settler Colonialism and Resistance, 1917–2017*. Metropolitan Books. ISBN: 9781627798556 p 138.

The available literature on the subject is both extremely rich and at the same time very poor. On the one hand, the literature dealing with the history of the topic is the size of a library in terms of the Israeli-Arab conflict.

On the other hand, a comprehensive and credible analysis of Hamas' attack of surprising size and wild brutality from a technical point of view, revealing human errors, has not yet been done from an Israeli point of view. Hence, the related literature is poor. When reviewing the literature of the Arab-Israeli conflict, of course, both the works of Israeli academics and the works of Arab authors and the works of the staff of many Western research centres were analyzed. Given the limited opportunities provided by the paper, this literature review part of the current paper only shows a few examples and reflects on the fact that different academics sometimes express rather opposite opinions.

Arie Arnon (Israeli professor) in his essay titled "Israeli Policy towards the Occupied Palestinian Territories: The Economic Dimension, 1967-2007" gave a comprehensive description of the economic background of the Arab-Israeli conflict. Interestingly, he argued about the division of the land into two states and two economic (and political) sovereign entities, while also negating the "One," i.e., the establishment of a single political and economic entity. Rashid Khalidi (Palestinian-American historian) in his book titled "The Hundred Years' War on Palestine: A History of Settler Colonialism and Resistance" claims that the colonial war on the Palestinians is still ongoing, waged first by the Zionist movement and then Israel, but backed by Britain and the United States.

Italian journalist and historian, Paola Caridi, in her novel book titled "Hamas: From Resistance to Regime", which was published in 2023, gave an extremely detailed overview of the way of changing Hamas from a charitable organization into a repressive and killing-machine regime.

One of the Arab world's leading journalists, Zaki Chehab, in his book titled "Inside Hamas: The Untold Story of the Militant Islamic Movement" describes the modus operandi of Hamas. Surprisingly, he states that the Hamas operatives bought their first weapons cache from the Shin Bet (Israel's domestic security agency) who wanted to weaken Fatah.

1. Political Background of Hamas' Massacre on October 7

The Hamas massacre was an extremely shocking, earthquake-like, creepy, and horrifying serial event. The scale of the attack and extreme brutality shocked and outraged not just Israeli sociality but the entire civilized world. How did Hamas, which was established in 1987 focusing mainly on charity activities, transformed into a monster, ISIS-like killing machinery?

It is well-known that Hamas was founded by Ahmad Yassin, and from the very beginning he considered the organization as the armed wing of the

Muslim Brotherhood. Yassin opposed the Israeli-Palestinian peace talks, and in his opinion, "Palestine is a Muslim land, which an Arab leader has no right to give up," and "Israel must disappear from the face of the Earth."⁶

Hamas is not the only terrorist organization in Gaza. Currently, 17 different terrorist organizations are known in the Gaza Strip, which have a rather diverse ideological background.

For example, the Palestine Islam Jihad, created in 1979, is more militant faction; it operates primarily in Gaza, but it also has some underground cells in Cis-Jordan. Interestingly, Hamas was created at the beginning as a rival organization, counterbalancing Iranian influence among the Palestinians in Gaza (Tamini, 2007, pp. 25-27). This is especially because the Palestine Islam Jihad operated completely under Teheran influence.⁷ Thus, it is important to note that the Palestine Islam Jihad has been established by two former Palestinian members of the Muslim Brotherhood in Egypt, Fathi Shikaki and Abd al Aziz Awda.⁸ Several terrorist organizations have indeed grown out of the Egyptian Muslim Brotherhood, in addition to the ones already mentioned. For example, there is also the Egyptian Islamic Jihad which in 2001 merged with al-Qaida. Furthermore, there is also an opinion that at the beginning, the Israelis also supported Hamas (Chehab, 2007, p.87) even with the possibility of acquiring weapons.⁹

In 1992, after the Gulf War, Teheran decided to support Hamas with around 30 million USD annually and to provide weapons and training for Hamas terrorists.¹⁰ "The enemy of my enemy is my friend" logic worked in this case as well. Iran was able to cross the religious divide, as both Hamas and the Palestinian Islamic Jihad are Sunni organizations. To build its regional

⁶Bridgett Kendell and Sheikh Yassin (2024). Spiritual figurehead, BBC, 22 March 2004. Downloaded from http://news.bbc.co.uk/2/hi/in_depth/middle_east/2001/israel_and_the_palestinians/profiles/1695470.stm on 11 January

⁷Azzam Tamini (2007). Hamas: a history from within. Publisher Northampton, Mass. Olive Branch Press. ISBN 9781566566896 pp 25-27

⁸Holly Fletcher (2008). Palestinian Islamic Jihad, Council on Foreign Relations, 10 April. Downloaded from <https://www.cfr.org/background/palestinian-islamic-jihad> on 12 January 2024.

⁹Zaki Chehab (2007). Inside Hamas: The Untold Story of the Militant Islamic Movement. New York: Nation Books. ISBN: 9781560259688. p.87

¹⁰Daniel Levin (2023). History of Iran, Hamas and Islamic Jihad Ties. United States Institute for Peace. 11 October 2023. Downloaded from <https://iranprimer.usip.org/blog/2018/jul/09/iran-hamas-and-palestinian-islamic-jihad> on 12 January 2024

Islamist power, Teheran provided financial and military support to both organizations (Nashr, 1996, p.98).¹¹

In 1997, Hamas proclaimed a jihad against Israel, and Ahmad Yassin gave his authorization for the execution of previously unknown new forms of terrorist attacks, such as suicide bombings, even those carried out by women or children. In 2005, when Israel liquidated its 21 colonies, the Israeli government had high hopes for lasting peace. Even so, some Israelis believed that the Gaza Strip under the leadership of Arafat-led Palestinian Authority would be able to convert that enclave into “Singapore in the Middle East” (Amon, 2007, p.573).¹² Unfortunately, Hamas the “children” Muslim Brotherhood had a different agenda. Hamas, the so-called “resistance movement,” was initially a charitable organization, but it later established its military wing and started to organize suicide bombings against Israeli targets.

Hamas gained popularity among the Palestinians in Gaza by creating schools, medical complexes (Caridi, 2023, p.113), and even hospitals that provided free services for poor families.¹³ The money came from rich Gulf States and individuals. Hamas’ policy is still based on the old three NOs, dating back to the Arab League summit held in Khartoum on August 29, 1967. "The Three No's" were: No peace with Israel, No recognition of Israel, and No negotiations with Israel. Furthermore, the final communiqué of the summit underlined the right of Palestinians not just to retake the whole of Palestine, “from the sea to the river,” but also to destroy the State of Israel.¹⁴

For Hamas, Arafat-led Fatah became a “traitor” when they started to negotiate with the Israeli government. Hence, from 2005, they also confronted Palestinian Authority law enforcement officers in Gaza and galvanized a mass movement among the Palestinians against Israel and Fatah. Hamas pose the primary challenge to Fatah and generally the secular nationalists (Lybarger, 2007, pp. 30-32). Their growing strength lies in their alternative cultural-political milieu, which includes independent financial, social, political, and paramilitary structures.¹⁵

¹¹Kamel B. Nashr (1993). Arab and Israeli Terrorism: The Causes and Effects of Political Violence, 1936-1993. McFarland Publishing. NC. USA. ISBN: 978-0786402809. p.98

¹²Arie Arnon (2007). Israeli Policy towards the Occupied Palestinian Territories: The Economic Dimension, 1967-2007. Published By: Middle East Institute, Middle East Journal, Vol 61. No4 , p 573

¹³Paola Caridi (2023). Hamas: From Resistance to Regime. Publisher: Seven Stories Press, ISBN: 978-1644211892 p.113

¹⁴Tamara Zieve (2012). This week in History: The Arab League Three Nos. Jerusalem Post. 26 August. Downloaded from <https://www.jpost.com/Features/In-Thespotlight/This-Week-In-History-The-Arab-Leagues-three-nos> on 10. 01. 2024.

¹⁵Loren D. Lybarger (2007). Identity and Religion in Palestine: The Struggle between Islamism and Secularism in the Occupied Territories, Princeton and Oxford: Princeton University Press, pp. 30-32

Subsequently, Hamas took full advantage of Fatah's corruption, carelessness, and unpopularity due to the charitable activities of Hamas. From 1993-2000, Palestinians expected their lives to improve regarding freedom of movement and socioeconomic standing. When both worsened, significant resentment built up in the Palestinian society. This discontent, further fed by the failure of the Camp David summit in July 2000 (Pressman, 2006, pp. 114-115), laid the groundwork for popular support for a more aggressive approach with Israel.¹⁶ Hamas turned to its advantage two major event in 2000, namely: the failure of the Camp David negotiations in July 2000 and Ariel Sharon's provocative visit to the al-Aqsa Mosque in September (Byman, 2011, p. 115). However, both events triggered the Second Intifada.¹⁷

Hamas had just participated in the First Intifada in 1987 (Milton-Edwards, 2010, pp. 54-56), but the organization had already initiated and led the Second Intifada in the year 2000.¹⁸ The Izz ad-Din al-Qassam Brigade, established in 1991, is the military wing of Hamas and has launched continuous attacks against Israeli civilians and military targets. Attacks against civilian targets mostly included rocket attacks and, since 1993, suicide bombings. After the death of Arafat, Mahmood Abbas became president of the Palestine Authority. In 2006, they held a legislative election but surprisingly Hamas received 44.45% of the vote and won 74 of the 132 seats.¹⁹ This electoral victory of Hamas divided the otherwise not-very-united Palestinian leadership. Moreover, the following year, the rift became final when Hamas militarily liquidated Fatah in Gaza. At the same time, Tehran increased its arms deliveries and financial support, already supporting Hamas with 250 million USD in 2006.

At the outbreak of the Syrian civil war, a short-term decrease in Iran's support was caused by statements of Hamas supporting the Sunnis in Syria. Hamas was expelled from Syria (Kapitan, 2004, p. 187), and it was Qatar that took in the terrorist organization's top management.²⁰

¹⁶Jeremy Pressman (2006). The Second Intifada: Background and Causes of the Israeli-Palestinian Conflict. *Journal of Conflict Studies*. 23 (2). ISSN 1715-5673. pp 114-115

¹⁷Daniel Byman (2011). *A High Price: The Triumphs and Failures of Israeli Counterterrorism*. Oxford University Press. ISBN: 9780199830459 p 115.

¹⁸Beverley Milton-Edwards and Stephen Farrell Hamas (2010). *The Islamic Resistance Movement*, Published by Polity Oxford UK, ISBN: 978-0745642963 pp. 54-56.

¹⁹Al Jazeera (2006). Hamas wins huge victory, 26 January, Downloaded from <https://www.aljazeera.com/news/2006/1/26/hamas-wins-huge-majority> on 11 January 2024

²⁰Tomis Kapitan (2004). *Terrorism in the Arab-Israeli Conflict* (in Igor Primoratz ed., *Terrorism: The Philosophical Issue*) Publisher Palgrave, London UK. ISBN: 9781403918161. p 187

In 2019, the Iranian financial support to Hamas already reached 360 million USD per year.²¹ By 2023, Iran's arms exports, transfer of weapons manufacturing technology, training, and high-level financial support have turned Hamas into a powerful terrorist organization (Lewitt, 2007, p.156), which has completely become a regional servant of Tehran in its political goals.²²

2. Factors Behind a Successful Surprise Attack by Hamas

In 2006, Hamas surprisingly won the Palestinian legislative election and took control of the Gaza Strip in the following year from the secular rival, Fatah. After the Hamas takeover of the Gaza Strip, Israel declared Gaza under Hamas a hostile entity, introduced a series of sanctions, and implemented a strict blockade with Egyptian assistance. Since then, multiple wars have taken place between Hamas fighters and Israel, including in 2008-2009, 2012, 2014, and 2021.²³

On October 7, the Palestinian militants launched an attack on Israel in combination with a massive barrage of rockets fired from the Gaza Strip with armed militiamen breaching security barriers. This surprise attack happened almost the same day when 50 years ago the Egyptian and Syrian forces launched a coordinated attack against Israel during the Jewish holiday of Yom Kippur. According to Ely Karmon, the strategic goals of Hamas in its attack on Israel were the disruption of the normalization process between Saudi Arabia and Israel and the weakening of the Fatah-led Palestinian Authority in the West Bank.²⁴

Many analysts questioned how this could happen when Israel has one of the best intelligence services in the world. The Gaza Strip was monitored at a very high level, and a high-tech defence system was installed around the zone.

Nonetheless, the full picture is not yet known and presumably the post-war Commission of Inquiry investigation is still yet to come, but based on the available information, the causes can be classified into three large groups:

²¹Michael Banchner and Toi Staff (2019). Iran said increasing Hamas funding to \$30m per month, wants intel on Israel. the Times of Israel, 5 August 2019 Downloaded from <https://www.timesofisrael.com/iran-agrees-to-increase-hamas-funding-to-30-million-per-month-report/> on 12 January 2024.

²² Matthew Lewitt (2007). Hamas: Politics, Charity, and Terrorism in the Service of Jihad. Yale University Press. London UK. ISBN: 978-0300122589. p. 156.

²³ For historical context on Israel's war against Hamas, see Prof Dr Mária Bordás: Islamic Caliphate in the 21st Century (?) - Issues of State Effectiveness in the Middle East and Africa, 2015 Ludovika Kiadó. pp 151-157.

²⁴Ely Karmon (2023). The Goals of Hamas' Terrorist Attack on Israel from Gaza. International Institute for Counter-Terrorism (ICT). October. special report Downloaded from <http://www.jstor.org/stable/resrep53546> on 02 February 2024

1. Excessive reliance and faith in technology.
2. Incorrect threat assessment on the level of Israeli political, military, and intelligence leadership.
3. Successful deception operations by Hamas.

Regarding the first point, it has been clear that Israel has used extensive human networks in Gaza and several types of electronic intelligence to detect any potential attack, including Signals intelligence (SIGINT) gathered by interception of signals, communication (COMINT) or electronic signals (ELINT). Even though there were some signals that Hamas were preparing a surprise attack, for example, training for Hamas in Iran, Lebanon even in Gaza, the intelligence services failed on their part to avoid the October 7 attack.

Reportedly, members of Israel's domestic security service, the Israel Security Agency, also called "Shin Bet", responsible for the monitoring of Hamas activity in the Gaza Strip on the eve of October 7, assumed at first that the Palestinian organization was only conducting an exercise. Additionally, the English Translation of the Official Strategy of the Israel Defence Forces from 2015 mentioned that "Hamas is interested to maintain peace and quiet and not to bring about escalation" (Allison, 2016, p.11). However, this means that the IDF must have believed that Hamas had no interest in carrying out terrorist attacks against Israel anymore.²⁵

Moreover, Unit 8200, sometimes also named as "Israel SIGINT National Unit," suspended controlling Hamas' communications in 2022 because they deemed it unnecessary, and the unit even was not operational near the Gaza borderline on the morning of October 7.²⁶ It is worth mentioning that the Unit 8200 is the largest and one of the most secretive units of the Israeli Defensive Forces. Primarily, this organization is responsible for different clandestine operations, collecting signal intelligence (SIGINT) and code decryption, counter-intelligence, cyberwarfare, military intelligence, and surveillance as well. Moreover, this unit is the foremost technical intelligence agency in the world.²⁷

²⁵Graham Allison (2016). *Deterring Terror English Translation of the Official Strategy of the Israel Defence Forces*, Belfer Center Science and International Affairs. Cambridge, MA, USA. page 11.

²⁶TOI Staff (2023). Top Israeli intel unit wasn't operational on October 7 due to personnel decision, *Time of Israel*, 28 November Downloaded from <https://www.timesofisrael.com/top-israeli-intel-unit-wasnt-operational-on-october-7-due-to-personnel-decision/> on 21 January 2024

²⁷John Reed (2015). Unit 8200, Israel's Cyber Spy Agency. *Financial Times*, 10 July. Downloaded from <https://www.ft.com/content/69f150da-25b8-11e5-bd83-71cb60e8f08c> on 02 February 2024

Nevertheless, the head of Shin Bet, Ronen Bar, thought that Hamas might attempt a small-scale attack. He ordered a group of elite counterterrorism forces to deploy to Israel's southern border, who soon found themselves in the middle of a battle with thousands of Hamas gunmen.²⁸

Another fascinating question: why did Israel's Iron Dome air defence system fail? It was well-known that the Iron Dome missile defence system could destroy about 90% of the rockets and missiles that Hamas and other terrorist organizations were firing into Israel. To understand the failure of the Israeli air defence strategy on the tactical level, we first need to understand the basics of air defence systems. Any air defence system has a sub-system of detections, which is commonly known as radars.

According to Raytheon, the ELM-2084 MS-MMR Multi-Sensor Multi Mission Radar System, which was used in the Iron Dome air defence weapon system, is capable of detecting effectively a missile launch or hostile artillery shell between 50 and 90 km (the effective over distances from 4 to 70 km).²⁹ The Iron Dome is a highly advanced missile defence system made up of 10 mobile batteries deployed across Israel, and each battery includes launchers with Tamir interceptor missiles. Each battery can defend up to 155 square kilometers and is strategically placed around cities and populated areas.³⁰

A battery includes three to four launchers, and each launcher can hold up to 20 interceptors. This is simple maths and the system can capture and destroy a maximum of 800 targets in the case of missiles launched in the first series, assuming 100% capture.

All air defence systems can only track and target within their limitations. In other words, all systems can be overwhelmed. Their limit is called the saturation point, and the Palestinian terrorists understood this weakness.

Reportedly, on October 7, the Hamas and the Palestine Islamic Jihad launched around five thousand rockets into Israel.³¹ With thousands of rockets

²⁸Ronen Bergman and Patric Kingsley (2023). How Israel's Feared Security Services Failed to Stop Hamas's Attack. *The New York Times*, 10 October. Downloaded from <https://www.nytimes.com/2023/10/10/world/middleeast/israel-gaza-security-failure.html> on 24 January 2024

²⁹Israeli Aerospace Industries (2024). ELM-2084 MMR. Downloaded from <https://www.iai.co.il/p/elm-2084-mmr> on 02 February

³⁰Annika Burgess (2023). What is Israel's Iron Dome air defence system, and did it fail during the Hamas attack? ABC Net. 09 October. Downloaded from <https://www.abc.net.au/news/2023-10-10/what-is-israel-iron-dome-air-defence-gaza-rockets/102952172> on 02 February 2024

³¹Alex Hollings and Stavros Atlamazoglou (2023). Was Israel's IRON DOME overwhelmed, overhyped, or right on target? Sandboxx 12 October. Downloaded from <https://www.sandboxx.us/news/was-israels-iron-dome-overwhelmed-overhyped-or-right-on-target/> on 23. January 2024

pouring in from Gaza, Israel's Iron Dome batteries often reached saturation points that allowed rockets to pass through without being intercepted due to the physical limitations of the system itself. For overwhelming the Iron Dome system, Palestinians used homemade Qassam rockets and Type-63 (old Soviet BM-12) 107mm mini rocket launchers having 12 tubes. They used asymmetric assets against the most sophisticated air defence around the world, in this case quite effectively.

3. First and Second Phases of War

After the October 7 attack, Benjamin Netanyahu, Prime Minister of Israel, formally declared war on Hamas in Gaza on 8 October 2023, and the first phase of the war began. Practically, the first phase was marked by mass airstrikes, targeting terrorist installations, mainly concentrated in northern Gaza. The targeted and destroyed terrorist installations were weapons production plants, Hamas Intelligence Headquarters, and rocket launcher sites. In addition to air campaign, Israeli Defence Forces mobilized 300,000 reservists.

According to the Israeli Prime Minister's Office, the military goals of the "Operation Iron Sword" are the destruction of the military and governmental capabilities of Hamas and Palestinian Islamic Jihad.³²

Before the land operation started, the IDF conducted extremely high intensity of air reconnaissance activity in combination with high-precision air strikes. The precise number of airstrikes is unknown. However, according to Turkish information, the executed strikes could be around 12,000, and this number does not include the artillery strikes.³³

On 9 October, Israel announced a so-called "total blockade", including water, electricity, fuel, food, and medicine supplies.³⁴ Moreover, nearly 60,000 Israelis were evacuated from the Gaza envelop towns, and Israeli military units, including some armoured brigades, have been tasked to guard the destroyed fence and entering point to Gaza to establish a security zone around the Gaza Strip.

On 13 October, the IDF issued an evacuation warning for northern Gaza to leave a place within 24 hours. Finally, on 27 October, the IDF

³²TOI Staff (2023). Security cabinet says Israel will destroy military, governmental abilities of Hamas, Islamic Jihad. The Times of Israel, 8 October. Downloaded from https://www.timesofisrael.com/liveblog_entry/security-cabinet-says-israel-will-destroy-military-governmental-abilities-of-hamas-islamic-jihad/ on 28 January 2024

³³Abdel Rauf Arnaut (2023). Israel has launched over 12,000 airstrikes in Gaza since October 7. 02.11.2023. Downloaded from <https://www.aa.com.tr/en/middle-east/israel-has-launched-over-12-000-airstrikes-in-gaza-since-oct-7-army/3041404> on 04 February 2024.

³⁴Al Jazeera (2023). Israel announces 'total' blockade on Gaza, 9 October. Downloaded from <https://www.aljazeera.com/news/2023/10/9/israel-announces-total-blockade-on-gaza> on 25 January 2024

launched a large-scale ground invasion into northern Gaza by deploying armoured and mechanized units. Surprisingly, the IDF first attacked the Hamas positions on the seaside. The Israeli army first allowed the civilians to leave the area and only later cut the Gaza Strip into two parts. The army of the Jewish state was in no hurry to capture the densely populated, tunnel-filled cities of Gaza and Beit Hanoun. However, on 1 November, after difficult and complex negotiations and Qatar's mediation, at least 355 foreign passport holders – including confirmed British, US, French, Italian and Austrian nationals – and 76 wounded Palestinians crossed into Egypt via the Rafah border crossing point.

Clashes between terrorists of the Izz el-Deen al-Qassam Brigades and the IDF regularly took place near hospitals and schools. Unfortunately, many youths, adolescents, and women lost their lives due to the inhumane policy and tactics of using human shields by Hamas.

Fierce fighting between Palestinian terrorists and the IDF continued through the middle of November but on 22 November, Israel and Hamas reached a temporary ceasefire agreement.

Again, Qatar was the main negotiator and mediator. However, the success was an outcome of a joint effort of Qatar, Egypt, and the United States.³⁵ In the Israeli government, the ceasefire was opposed by three ministers from the extremist, anti-Arab, Jewish far-right parties such as “Jewish Power”. The signed ceasefire between Israel and Palestinian terrorist groups, including Hamas, Palestine Islamic Jihad, and Popular Front for Liberation of Palestine, in the Gaza Strip took effect from 24 November 2023 to 30 November 2023. The central element of the agreement was the exchange of Israeli and other hostages held by Palestinian terrorists for prisoners who had committed various crimes held in Israeli prisons.

Even though there was hope that the ceasefire would become permanent, unfortunately, the ceasefire collapsed on the 1st of December. The main reason was the terrorist attack in Jerusalem on 30 November and the renewed missile attacks by Hamas.³⁶ However, the seven-day ceasefire had some positive outcomes because the Palestinian terrorist groups released 150 hostages, including 78 Israeli women and children, and 240 Palestinians were also released from Israeli jails. The next day, on 1st December, the third phase of the war began.

³⁵Amr Hazawy (2023). The Political Impact of the Israel-Hamas Ceasefire. Carnegie. 06 December. Downloaded from <https://carnegieendowment.org/2023/12/06/political-impact-of-israel-hamas-ceasefire-pub-91177> on 24 January 2024

³⁶Emanuel Fabian (2023). Four killed, 5 injured in Hamas-claimed terror shooting at Jerusalem bus stop. Jerusalem Post, 30 November. Downloaded from <https://www.timesofisrael.com/three-killed-6-injured-in-terror-shooting-at-jerusalem-entrance-bus-stop/> on 05 February 2024

Conclusion

This paper begins with an introduction that briefly presents the historical background of the Israeli-Arab conflict. Then, in the first chapter of the study, the political background of the Hamas attack was revealed. Here, Hamas' development path from an initially charitable organization to a brutal terrorist organization has been detailed and dissected with particular attention. In the second chapter, the circumstances and some technical elements of the successful attack by Hamas, which caused strategic surprise, were analyzed. In the next part of the study, the military-political implementation of the war events, which the Israelis call the first and second phases of the war, was explored.

Based on the research outcomes, it could be concluded that before the October 7 attack, the Israeli intelligence apparatus, military commanders, security officials, and more importantly, Prime Minister Benjamin Netanyahu himself, regarded Hamas as a second-tier threat, ranking below Iran and its premier proxy, Hezbollah, and settlements' issue in the West Bank.

Hence, despite intense surveillance of Gaza, Hamas was able to plan its elaborate assault in full secrecy, hacking through Israel's high-tech "smart fence" with bulldozers, motorbikes, and bolt-cutters. Reportedly, Israeli intelligence and security officials tried for months to alert Benjamin Netanyahu, the country's prime minister, to the fact that the political turmoil brought on by his domestic policies was undermining national security and giving Israel's enemies more confidence. Despite these warnings, Netanyahu disregarded them and persisted in pursuing his policies, which likely left Israel vulnerable and exposed to an attack.

In this regard, Israel's political and security leadership has a lot to answer for. Although the full details have not yet been revealed, serious findings have already come to light. Potential warning signs were ignored, dismissed, or downplayed, and misplaced security priorities could have made the attack even more lethal. In addition to a comprehensive investigation into what went wrong, the Israeli public will demand a full accounting from Prime Minister Benjamin Netanyahu for his role in the disaster.

On October 7, the prime minister moved quickly to declare war on Hamas in Gaza, and he later repeatedly stressed that Israel will not stop its military operations until it accomplishes all its objectives, chief among them being the destruction of Hamas. Three months after the launch of the Israeli ground invasion of the Gaza Strip, as a new phase of the war just begun, it was still not clear if the main objective of the military response was even realistic, and what has the IDF achieved so far in Gaza.

Israel should realize that the slaughter of at least 1,400 Israelis by Hamas death squads represented a catastrophic collapse of Israel's existing security strategy. The failure of Israel's intelligence and security forces and

their overseers within the government cannot be overemphasized. The old deterrence model—which assumed that Hamas could be contained through technological defence and occasional, limited deterrence operations in the Gaza Strip—has failed. We still do not know, when and how the war will end but once the war is finished, Israel must deal with more serious issues.

The first is how to stabilize Gaza. Israel cannot be responsible for running Gaza, but the Israeli government must act responsibly and allow stakeholders and partners to take care of the needs of the Palestinian civilian population there and prevent the re-emergence of terrorist threats. Secondly, Israel must develop a new security approach and a new policy to protect its borders and keep its people safe.

The potential for destabilization in the region is currently significant, especially in the immediate neighbourhood of Egypt, the West Bank, and Lebanon. The conflict is multi-dimensional, as it is largely affected by Iran's proxy forces striving for regional hegemony. At the same time, Israel proposed that the Palestinians from Gaza should be relocated to the Sinai Peninsula. It was rejected in Egypt, but also in other countries of the region, the United States and the EU opposed this idea of forced displacement. The humanitarian situation of the Arabs in Gaza and the inflexibility of the Netanyahu government will greatly test Israeli-American relations. The moral capital that Israel had at the start of war operations is dwindling.

The possibility of escalation of the Israel-Hamas war, the possibility of regional and, in this case, military action against Iran, as well as efforts to counter these possibilities and military-political de-escalation are present at the same time. For now, the difficult question to answer is whether American policy will be able to control the conflict and maintain its influence in the region.

Consequently, the activities of the Houthis in the Red Sea and the potential war against Hezbollah are examples of regional escalation that could cause significant turmoil in the Middle East, risking access to vital energy resources, especially oil and gas, which could even cause global economic problems. There is no doubt that Israel's war in Gaza will profoundly influence the geopolitical landscape of the region.

Conflict of Interest: The author reported no conflict of interest.

Data Availability: All data are included in the content of the paper.

Funding Statement: The author did not obtain any funding for this research.

References:

1. Abdel Rauf Arnaut (2023). Israel has launched over 12,000 airstrikes in Gaza since October 7. 02.11.2023. Downloaded from <https://www.aa.com.tr/en/middle-east/israel-has-launched-over-12-000-airstrikes-in-gaza-since-oct-7-army/3041404> on 04 February 2024.
2. Al Jazeera (2023). Israel announces 'total' blockade on Gaza, 9 October. Downloaded from <https://www.aljazeera.com/news/2023/10/9/israel-announces-total-blockade-on-gaza> on 25 January 2024
3. Al Jazeera (2006). Hamas wins huge victory, 26 January 2006, Downloaded from <https://www.aljazeera.com/news/2006/1/26/hamas-wins-huge-majority> on 11 January 2024
4. Alex Hollings and Stavros Atlamazoglou (2023). Was Israel's IRON DOME overwhelmed, overhyped, or right on target? Sandbox 12 October 2023. Downloaded from <https://www.sandboxx.us/news/was-israels-iron-dome-overwhelmed-overhyped-or-right-on-target/> on 23. January 2024
5. Amr Hazawy (2023). The Political Impact of the Israel-Hamas Ceasefire. Carnegie. 06 December. Downloaded from <https://carnegieendowment.org/2023/12/06/political-impact-of-israel-hamas-ceasefire-pub-91177> on 24 January 2024
6. Annika Burgess (2023). What is Israel's Iron Dome air defense system, and did it fail during the Hamas attack? ABC Net. 09 October 2023. Downloaded from <https://www.abc.net.au/news/2023-10-10/what-is-israel-iron-dome-air-defence-gaza-rockets/102952172> on 02 February 2024
7. Arie Arnon (2007). Israeli Policy towards the Occupied Palestinian Territories: The Economic Dimension, 1967-2007. Published By: Middle East Institute, Middle East Journal, Vol 61. No4, p. 573
8. Arie J. Kochavi (1998). The Struggle against Jewish Immigration to Palestine Middle Eastern Studies, Vol. 34, No.3, July. pp. 146-167
9. Azzam Tamini (2007). Hamas: a history from within. Publisher Northampton, Mass. Olive Branch Press ISBN 9781566566896 pp 25-27
10. Benny Morris (1948). A History of the First Arab-Israeli War, 2008, Yale University Press. ISBN: 9780300151121. pp. 142-154; 156-158
11. Beverley Milton-Edwards and Stephen Farrell Hamas (2010). The Islamic Resistance Movement, Published by Polity Oxford UK, ISBN: 978-0745642963 pp54-56.
12. Bridgett Kendell and Sheikh Yassin (2004). Spiritual figurehead, BBC, 22 March 2004. Downloaded from

- http://news.bbc.co.uk/2/hi/in_depth/middle_east/2001/israel_and_the_palestinians/profiles/1695470.stm on 11 January 2024
13. Daniel Levin (2020). History of Iran, Hamas, and Islamic Jihad Ties. United States Institute for Peace. 11 October 2023. Switzerland, ISSN 1561-5502. p.20.
 14. Ely Karmon (2023). The Goals of Hamas' Terrorist Attack on Israel from Gaza. International Institute for Counter-Terrorism (ICT). October. special report Downloaded from <http://www.jstor.org/stable/resrep53546> on 02 February 2024
 15. Emanuel Fabian (2023). Four killed, 5 injured in Hamas-claimed terror shooting at Jerusalem bus stop. Jerusalem Post, 30 November 2023. Downloaded from <https://www.timesofisrael.com/three-killed-6-injured-in-terror-shooting-at-jerusalem-entrance-bus-stop/> on 05 February 2024
 16. Graham Allison (2016). Detering Terror English Translation of the Official Strategy of the Israel Defense Forces, Belfer Center Science and International Affairs, Cambridge, MA, USA. page 11.
 17. Holly Fletcher (2008). Palestinian Islamic Jihad, Council on Foreign Relations, 10 April. Downloaded from <https://www.cfr.org/backgrounder/palestinian-islamic-jihad> on 12 January 2024.
 18. Israeli Aerospace Industries (2024). ELM-2084 MMR. Downloaded from <https://www.iai.co.il/p/elm-2084-mmr> on 02 February.
 19. Jeremy Pressman (2020). The Second Intifada: Background and Causes of the Israeli-Palestinian Conflict. Journal of Conflict Studies. 23 (2). ISSN 1715-5673. pp 114-115
 20. John Reed (2015). Unit 8200, Israel's Cyber Spy Agency. Financial Times, 10 July. Downloaded from <https://www.ft.com/content/69f150da-25b8-11e5-bd83-71cb60e8f08c> on 02 February 2024
 21. Kamel B. Nashr (1993). Arab and Israeli Terrorism: The Causes and Effects of Political Violence, 1936-1993. McFarland Publishing. NC. USA. ISBN: 978-0786402809. p.98
 22. Loren D. Lybarger (2007). Identity and Religion in Palestine: The Struggle between Islamism and Secularism in the Occupied Territories, Princeton and Oxford: Princeton University Press, Princeton USA, pp. 30-32.
 23. Matthew Lewitt (2007). Hamas: Politics, Charity, and Terrorism in the Service of Jihad. Yale University Press. London UK. ISBN: 978-0300122589. p. 156
 24. Michael Banchner (2019). Toi Staff: Iran said increasing Hamas funding to \$30m per month, wants intel on Israel. the Times of Israel,

- 5 August. Downloaded from <https://www.timesofisrael.com/iran-agrees-to-increase-hamas-funding-to-30-million-per-month-report/> on 12 January 2024.
25. Paola Caridi (2023). *Hamas: From Resistance to Regime*. Publisher: Seven Stories Press, NY, USA. ISBN: 9781644211892. p 85, 113
 26. Rashid Khalidi (2017). *The Hundred Years' War on Palestine: A History of Settler Colonialism and Resistance, 1917–2017*. Metropolitan Books, ISBN: 9781627798556 pp 137-139
 27. Ronen Bergman and Patric Kingsley (2023). How Israel's Feared Security Services Failed to Stop Hamas's Attack. *The New York Times*, 10 October. Downloaded from <https://www.nytimes.com/2023/10/10/world/middleeast/israel-gaza-security-failure.html> on 24 January 2024
 28. Tamara Zieve (2012). This week in History: The Arab League Three Nos. *Jerusalem Post*. 26 August.
 29. Tomis Kapitan (2004). *Terrorism in the Arab-Israeli Conflict* (in Igor Primoratz ed., *Terrorism: The Philosophical Issue*.) Publisher Palgrave, London UK. ISBN: 9781403918161. p 187
 30. TOI Staff (2023). Security cabinet says Israel will destroy military, governmental abilities of Hamas, Islamic Jihad. *The Times of Israel*, 8 October 2023. Downloaded from https://www.timesofisrael.com/liveblog_entry/security-cabinet-says-israel-will-destroy-military-governmental-abilities-of-hamas-islamic-jihad/ on 28 January 2024
 31. TOI Staff (2023). Top Israeli intel unit wasn't operational on October 7 due to personnel decision, *Time of Israel*, 28 November. Downloaded from <https://www.timesofisrael.com/top-israeli-intel-unit-wasnt-operational-on-october-7-due-to-personnel-decision/> on 21 January 2024
 32. Yevgeny Primakov (2009). *Russia and the Arabs: Behind the Scenes in the Middle East from the Cold War to the Present* Publisher: Basic Books; ISBN: 9780465019977. pp. 311-333.
 33. Zaki Chehab (2007). *Inside Hamas: The Untold Story of the Militant Islamic Movement*. New York: Nation Books. ISBN: 9781560259688. p.87

Appraisal Theory: Can It Be Applied to Visual Images in Isolation to the Text?

Bashayir AlZahrani

Head of Strategic Planning and Performance Management Department in the Armed Forces hospitals, Taif, Saudi Arabia

Mohammed Alhuthali

Associate Professor in Foreign Languages Department at Taif University

[Doi:10.19044/esj.2024.v20n11p18](https://doi.org/10.19044/esj.2024.v20n11p18)

Submitted: 17 February 2024

Accepted: 31 March 2024

Published: 30 April 2024

Copyright 2024 Author(s)

Under Creative Commons CC-BY 4.0

OPEN ACCESS

Cite As:

AlZahrani B. & Alhuthali M. (2024). *Appraisal Theory: Can It Be Applied to Visual Images in Isolation to the Text?* European Scientific Journal, ESJ, 20 (11), 18.

<https://doi.org/10.19044/esj.2024.v20n11p18>

Abstract

The role of women in Saudi society is evolving; however, the process of reform is subject to multiple interpretations. This makes the role of resemiosis when interpreting visual media particularly important, perhaps more than a direct focus on the semiotic modes adopted. Data was collected from a variety of on-line media covering the recent changes. Appraisal Theory was used to capture the judgement process in terms of emotions experienced by the reader/viewer and how the wider context such as the full news article, or even just the headline, forms a part of this process. This posits that in contested situations, resemiosis is a critical part of the process and sometimes the apparent interpretation of a single image (intersemiosis) can be different to the interpretation of the whole. In such instances, different semiotic modes convey different meanings but a focus on one in isolation can be misleading as to the overall intent.

Keywords: Appraisal Theory, Resemiosis, Intersemiosis, Meaning-making, Saudi Women, Media

Introduction

The role of women, and specific restrictions they face, in Saudi Arabia has regularly attracted adverse comment. To many non-Saudis, the restrictions on the right to travel, social interaction outside the home, and the ban on driving were seen as indicative of a profoundly authoritarian society (Satiti, 2017). On the other hand, these comments took little no or account of the areas where Saudi women had freedom such as access to education, the right to run their own businesses, or increasing access to the labour market. From 2017, a major series of reforms to the male guardianship have opened up public spaces, eased male control over the right to travel, and lifted the ban on driving (Elyas & Aljabri, 2020). In turn, this has generated contested narratives between those who see these as profound and fundamental reforms (Rizvi & Hussain, 2022) and those who argue the changes are, at best, cosmetic (Aldosari, 2018; Lacroix, 2019; Rizvi & Hussain, 2022), leaving women's rights still largely subject to male approval.

This presents significant problems in interpreting media, especially visual media, when there are divergent opinions, and there may be a lack of trust as to the motives behind particular presentations (Alhuthali, 2018). This argues that when studying the interpretation of images of women in contemporary Saudi society, while the conventional focus on semiotic modes and their interaction (Iedema, 2003; Jewitt, 2005) is useful as part of an analysis, the prior attitudes and emotional response of an observer are equally important (Martin & White, 2005). This study takes a number of images, some photographs in natural settings, one from a magazine cover, and a number of cartoon style images, and uses the concept of appraisal as a tool to explore the ways in which a viewer might respond to and seek to interpret the images.

Literature Review

Recent Changes in Saudi Society

The representation of women in the Middle East, and Saudi in particular, has often been marked by stereotypes and prior assumptions in the western media. The tendency has focused on stressing either backwardness and repression and the substantial restrictions facing women in public life, but with little emphasis of how women have always been able to run their own businesses (Al-Asfour, Tlaiss, Khan, & Rajasekar, 2017) or access higher education. By focusing on the severe restrictions, the net effect overlooks or downplays any agency of Saudi women (Satiti, 2017) in shaping their own lives.

The legal changes since 2017 in Saudi Arabia, regarding male guardianship rules, have created a limited right to drive and more freedom to travel. This allows greater freedoms where agreed upon by the relevant male guardian and, more subtly, creates pressure for such permission to be granted.

As such, they have attracted attention both in the Western press (Elyas & Aljabri, 2020) and across the Arabic speaking world (Adel, 2019). More widely, these changes are promoted by their supporters as a radical reset of social relations in Saudi Arabia and by others as far too limited and possibly cosmetic in nature (Boghani, 2019). However, changes such as the right to drive are still subject to male consent, or in other words, women in a household can now drive if the head of the family allows this (Aldosari, 2018).

The reporting of these changes has witnessed the use of photographs, cartoons and videos, as well as more traditional text. This multimodal media approach to constructing and conveying meaning places an emphasis on creating a visual grammar as an important tool for interpreting images (Chen & Gao, 2014; Kress & van Leeuwen, 2006).

Visual Grammar and Interpretation

To establish a framework, Kress and van Leeuwen (2006) distinguish between the represented participants and the interactive participants in an image (Kress & van Leeuwen, 2006). This approach further delineates objects, including people, background locations, and other contextual information, as represented participants, while both creator and viewer are seen as the interactive participants.

The interactive participant (the reader or viewer) draws together meaning from the image using four main systems: contact, social distance, perspective, and modality (Kress & van Leeuwen, 2006). Contact depends on how the represented characters interact with the viewer. If they are looking directly at the viewer, this can be seen as a 'demand', especially as some form of direct response is expected (ranging from empathy to disgust). If this is lacking, then the image is an 'offer' with a degree of passivity (Peng, 2022), but equally, it can be a situation where the future viewer is effectively irrelevant in terms of interaction within the image. In terms of demand, facial expressions are an important part of structuring the desired response. Social distance relies both on the composition within the image (how close the represented participants are), technical issues such as camera view (close up or long range), and how much of the participants is shown (Padilla & Padilla, 2022). Camera view also builds up the perspective in the sense of looking down at the participants, looking up at them, or at eye level. As with other social interactions, these positions are often held to reflect the relative power and importance between the participants.

Appraisal Theory and Contested Meaning Making

However, in a contested situation (Kress, 2010), understanding is not just a product of the semiotic modes adopted or how they are combined (Lazarus, 1991). To address this step, the concepts of Appraisal Theory are

particularly useful (Martin & White, 2005), especially when the presented image seeks to change behaviour or attitudes. In their model, “attitude is divided into three regions of feeling: ‘affect’, ‘judgement’, and ‘appreciation’. Affect deals with resources for construing emotional reactions” (p. 35), and this can be summarised as:

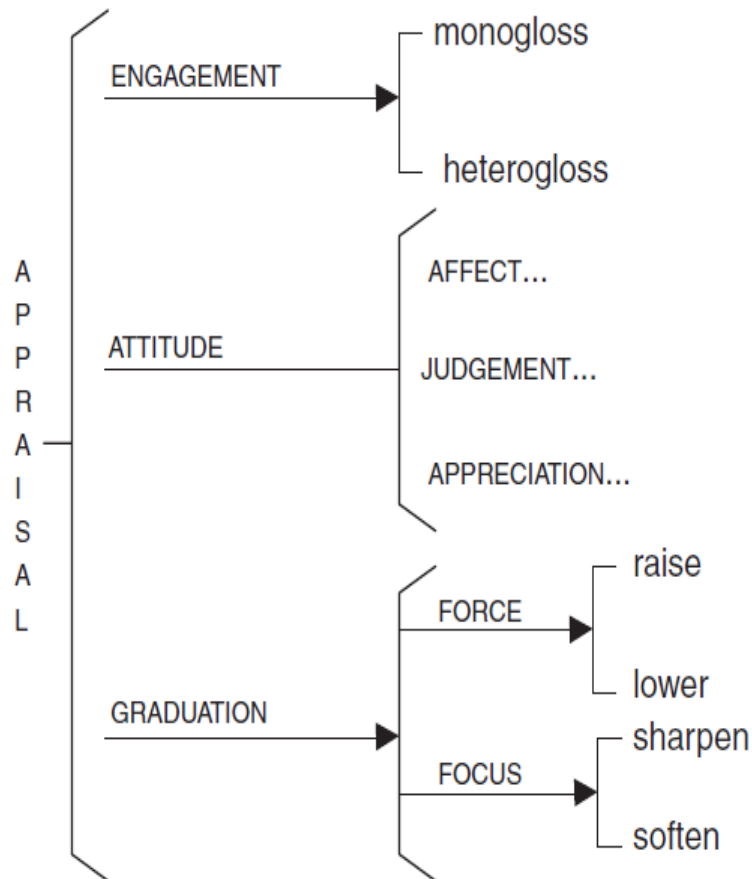


Figure 1. Outline of an Appraisal Framework (Martin & White, 2005, p.38)

This approach was initially derived by Lazarus (1991) to understand how a situation determined the reaction of an individual. He argued that this process used two major types of appraisal methods: 1) *primary appraisal*, where an individual tries to interpret an event; and, 2) *secondary appraisal*, where they try to understand the implications. Since Lazarus was primarily interested in stress, his argument emphasized that stress (as an emotion) arose from this process of interpretation and understanding. This model was subsequently expanded to create a two process model of appraisal-response-re-appraisal (Smith & Kirby, 2001). In turn, differences have been drawn between appraisal using pre-learned schemas or where conscious cognition is

required (Gratch & Marsella, 2005). The focus on stress allows the original work to be readily transferred to other emotions such as agreement or the implications of disagreement.

In Appraisal Theory, *Attitude* is used to capture those elements in the image that are used by the reader to identify responses based on their personal feelings and values. The sub-division of Affect captures the understanding of the emotions embedded in the image, Judgement reflects how the image indicates assessment of the character and behaviour of others, and Appreciation relates to judgements of the value of specific things. Most often, judgement, in particular, is socially determined as both creator and viewer will draw on the context (either within the text or in wider society) in order to judge how appropriate something is (Coffin, 2003).

Engagement is used to reflect the degree of nuance in the images. Thus, the more categorical the presentation is, the more likely it will be described as Monogloss. If the image allows for multiple meanings or is used to contrast different concepts, then it can be described as Heterogloss.

Graduation, in turn, is used to capture instances where the image is structured to either emphasise a particular point or to focus on a particular aspect. Thus, a neutral picture, indicating either lack of understanding or focus, will lack both aspects. As with the other categories, it is also possible for any statement to have more than one aspect. Therefore, a statement could stress both the focus and moderate the force if this was appropriate.

Research Design

This study is based on a small number of images that represent some of the changed social relations in Saudi society. As noted in the introduction, they are a mix of photographs and cartoon style images. The sample used for this paper was a sub-set drawn from a wider study that collected 50 images meeting certain criteria. These criteria stipulated that the images should relate to representations of the role of Saudi women and be sourced from western media. The majority of the wider sample was drawn from images published after 2018, thus reflecting recent changes, but a few predated that.

These search criteria were run using a search on google images. The images below were chosen for their relevance to the research focus but are representative of the broader spread of press coverage. In particular, photographs and cartoon style images were selected to enable a comparison between the two and consideration of how they might differ in their approach to meaning making.

The analytic approach was two-fold. Vector analysis was used within the images, as it is a powerful tool to explore the visual grammar in use, particularly regarding whether the image places a demand on the viewer (Kress & van Leeuwen, 2006). The concepts of Appraisal Theory (Ellsworth,

2013; Smith & Kirby, 2001) were then used to explore the role of context in meaning making and how this was influenced when the image was placed in the wider context of the surrounding article, other reporting, or even simply the chosen headline captions.

As a result the overall approach is qualitative (Braun & Clarke, 2013; Symon & Cassell, 2012), using a small number of images that, in turn, allows for in-depth study as to how meaning making is constructed.

Findings

The first image is taken from a Getty photograph of the newly created Saudi women's team in training (Nureldine, 2021) and the second is from a CNN report also on the creation of soccer/football league for women in Saudi Arabia (Kottasova & Thornton, 2020). Giving women access to both watch and play sport in public has been a major part of the post-2017 liberalisation and, as such, it is used to stress the importance of the changes. Of note, for both images, the sight vectors are related to their current actions, not to the external observer (Peng, 2022).



Figure 2. First Saudi female football team (Nureldine, F. 2021), photograph for /AFP/Getty Images

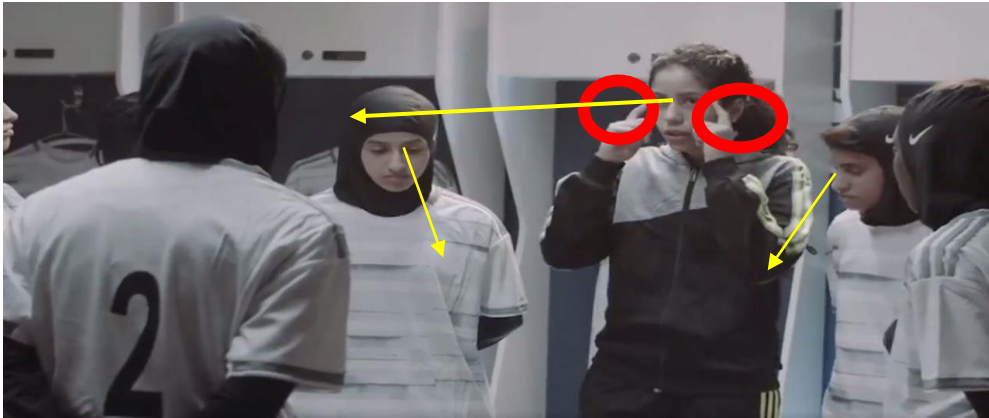


Figure 3. Saudi female football team From CNN (Kottasova & Thornton, 2020)

In terms of attitude, these two images, affect and judgement, are the important sources of evaluation. Without additional context, the primary attitude towards the first is one of essential normalcy. The players are dressed as one would expect many footballers to be in training, and their entire focus is on the footballs. This image is from a report published by CNN titled "Saudi Arabia Secures Victory in Its Debut Women's International Match" (Nureldine, 2021). The article notes that the idea of the women's team playing an international match is indicative that for some women, at least, the changes since 2017 have had a demonstrable effect on their lives (Aldosari, 2018; Kottasova & Thornton, 2020). It is worth noting that, while seen as a broadly positive outcome, some critics have stressed that women need permission to play sports rather than having a fundamental right to do so.

Figure 3 is slightly different, as the number of players wearing Hijabs marks this clearly as happening in an Islamic country. However, the extent of any explicitly Saudi context only comes from the wider article.

In terms of engagement, Figure 2 can be described as Monogloss. Although there are multiple actors in the image, the consistent focus is on the footballs they are individually working with. Figure 3 is Heterogloss, as it is open to multiple interpretations. The fact that the eyelines of the more visible individuals do not meet could suggest they have different focuses. Similarly, the interaction between the coach and her players could be perceived as either positive and supportive or highly critical. A similar distinction can be made regarding gradation, with the meaning of Figure 2 having a clear and consistent focus, while figure 3 appears more complex



Figure 4. HRH Hayfa bint Abdullah Al Saud (George, 2018)

The controversy around a 2018 cover for Vogue Magazine (George, 2018) showing a Saudi princess preparing to drive a car was reported by CNN (Young, 2018). The Vogue image and accompanying narrative were designed to show that the ban on women driving had been lifted. The CNN report noted that even after the decree was implemented, women who had long campaigned for the right to drive had been arrested. A more positive alternative reading to the original Vogue article indicates that the image makes it clear that the new rights are well embedded. The subject of the image is a member of the Saudi royal family and both the structure of the image and the place of its original publication are unambiguous as to what is happening.

In terms of image design, the subject is looking directly at the viewer, described as a demand for attention, and presumably in this case, empathy (Kress & van Leeuwen, 2006). Despite this, the image is perhaps an example of where the intended affect and some of the responses vary radically. The intent is to showcase the reforms using an image based around wealth and elegance. However, external judgements were less favourable, juxtaposing the relative privilege of the subject of the photograph with the ongoing detention of other women who had campaigned for this change. The image, as such, is intended to be Monogloss with a single focus on the woman in the car. However, this is an instance where the range of judgement gives it a Heterogloss outcome. In terms of graduation, the image is clearly designed to emphasise a particular point, and this is shared between both favourable and unfavourable readings.

The next two images are stills from two videos produced by Human Rights Watch in 2016. The first covers the restrictions on travel, resulting from the male guardianship system (Human Rights Watch, 2016a), and the second addresses issues around domestic abuse, resulting from the powers of the male guardianship system (Human Rights Watch, 2016b).

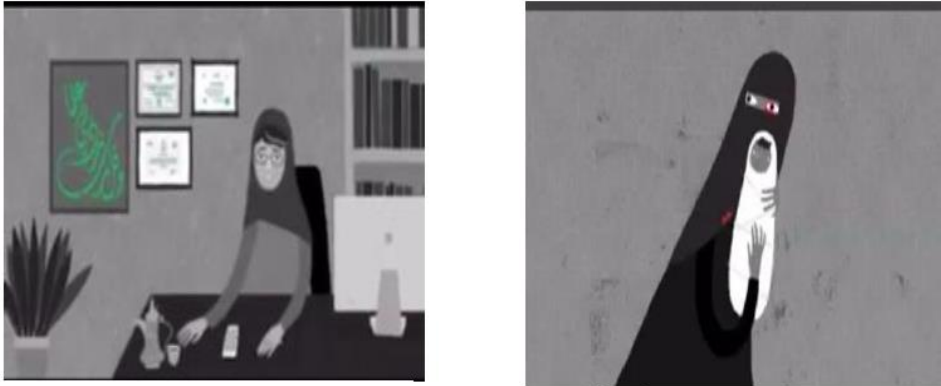


Figure 5. Campaign against Male Guardianship

The first image is taken from a narrative where the female subject has the chance to present at a prestigious conference but cannot gain the needed attention or permission from her son (who holds the guardianship). In the second image, the subject is fleeing domestic abuse clutching her young baby. In terms of affect, in the first picture, the subject is gazing downwards, in a pose often seen as invoking pity and empathy. In the second picture, the gaze is direct but also indicative of fear (and perhaps a degree of secrecy). Both images taken in isolation lead to a judgement of sympathy for the subjects and concern about the wider situation. The longer video in the first case shows the arbitrary nature of the denial to travel, and in the second, the ongoing consequences of the abuse – including the fact that the subject has no right to refuse to return to her husband. Both images can be seen as Monogloss, perhaps not a surprise as both are produced by an organisation campaigning for very specific changes. This is also reflected in terms of graduation, as there is little ambiguity either in the actual chosen stills or the full video.

The next two images (Lannes, 2018; Steinberg, 2018) are taken from a New York Times article published in 2018 after the ban on driving was lifted (Aldosari, 2018). The wider article notes the potentially far reaching nature of the changes but also emphasizes that this will mostly only apply to women with supportive guardians who can access the new freedoms, as opposed to those in more conservative social groups.



Figure 6. Women access to driving (New York Times, 2018)

In both images, in terms of affect, the overwhelming impression is one of residual control. In the second, it is not even clear if the female subject is actually being allowed access to a car, or if this is being withheld. The difference in this regard reflects the wider article's argument that the changes are significant but very limited.

The first image is slightly Heterogloss, as the male gesture could signify either continued control, concern that the new rights are well used, or simply removing previous restrictions (the flat palm away from the body). This carries over into a consideration of the degree of graduation. Both these images have a clear focus (women driving) but, as with the accompanying article, the images show how these new rights come with significant restrictions.

Discussion

The examples in this paper include two photographs taken in relatively natural settings (Kottasova & Thornton, 2020; Nureldine, 2021), a posed photograph for Vogue magazine (Young, 2018), two cartoon style images from a human rights pressure group (Human Rights Watch, 2016a, 2016b), and two cartoons (Lannes, 2018; Steinberg, 2018) from a New York Times article (Aldosari, 2018) that stresses the retention of male control despite the lifting of the absolute ban on women driving (and of note, a theme absent from the original Vogue article).

In general, the two natural photographs can be seen as more Heterogloss and subject to interpretation (especially Figure 3). What stands out about figure 2 is the relative normalcy of the image. Without the context of the CNN report, it could be any group of women undertaking football training. Figure 3 (Kottasova & Thornton, 2020) is, in many ways, the most complex. There are multiple vectors of direct gaze towards the floor, and the mix of headgear indicates an Islamic country. However, it is still not obviously

Saudi Arabia. Equally, in both figures, the focus of the subjects is internal and there is no direct interaction with an external observer.

Figure 4 stands out due to the difference between the message intended in the photograph and the more complex reporting in the wider article. The intent is to stress freedom and the lifting of restrictions, with the subject gazing directly at the camera. The context provided by the wider article becomes critical to any understanding of the range of meanings. To a large extent, this is an instance where observers will identify what fits their prior assumptions. Thus, the actual semiotic make-up of the image is secondary.

The two images from Human Rights Watch clearly depict a sense of grief, loss, and lack of control. Conversely, the two images from the New York Times portray male control, which may either be benevolent or indicate that restrictions can still be imposed. In this sense, the wider context is important but may be less critical for interpreting an image compared to the three photographs.

In terms of resemiosis, prior beliefs may be applied to the photograph alone. Nonetheless, in most cases, the intent of the creator, the reporter, and to some extent the observer can only be derived from the setting of the image. This is perhaps more important the more complex an image becomes. Even with the New York Times discussion, crucial information is lacking. Is the coach angry with her team – a possible interpretation given the relative eye vectors? Is she simply trying to explain something and downward gaze becomes indicative, perhaps of concentration? Equally, this could be considered perfectly normal. Different football coaches use different motivational techniques and the key message is that some women, at least in Saudi Arabia, can now take part in public, professional sport.

Conclusion

This paper supports the view that the analysis of images is dependent on a three-stage process. This begins with the construction of the image, particularly examining how participants interact both within the image and with a viewer. Building on this analysis is the additional context provided by, for example, the surrounding news item (or even just the title and knowledge of the publication). However, the process of resemiosis remains important, albeit more judgemental. The extent to which the recent changes in Saudi Arabia represent a fundamental shift in women's rights is contested and it is unsurprising that the various images are all open to multiple interpretations, mainly framed by a prior belief that the changes are profound or essentially cosmetic.

There is a relative split in the images. Figures 2 and 3 can be seen as naturalistic photographs. They may have been posed or carefully chosen, but they show individuals carrying out actions other than seeking to engage with

a later viewer. On the other hand, Figure 4, even if it is a photograph, is clearly constructed to present a clear image and understanding of the role of women (in this case, that they can indeed now drive in Saudi Arabia). As might be expected, cartoon images are not ambiguous. However, they are drawn and placed in a context to make a particular point.

The importance of this distinction is that in the first images, the viewer is allowed to make their own interpretation. This is derived from their prior understanding as well as the presented image. Nonetheless, resemiosis is an important part to the meaning making of the observer. The final photograph and four cartoons are created to invoke a particular interpretation. This might not always be successful, as seen in the contested Vogue cover. However, the aim is to ultimately guide the viewer towards a conclusion. The two images in Figure 5 are openly designed to emphasise aspects of Saudi society where women are denied agency. Conversely, the images in Figure 6 reflect the degree of control that still exists, where women are permitted to drive but require approval from their male guardians. Essentially, there is a clear intent to limit the role resemiosis can play in the observer's meaning making. The construction of the image directs the viewer towards a conclusion.

Thus, it is essential to study an image in terms of its internal semiotic modes: how it is built up, how it demands attention from the observer, and in some situations, this might suffice to complete the process of moving from the image to interpretation. In many cases, accessing secondary contextual information is also necessary, even if all this comprises the article headline.

This study suggests that resemiosis is not only a complex, essentially personal process, but its role in meaning making can be circumscribed by image composition and role. The more an image is composed to convey a particular meaning, the more the intention is to reduce the role of resemiosis in creating alternative interpretations. As seen with the Vogue cover, while this may be the intention, it is not always successful. For various reasons, the photograph became contested not in terms of its intended message, but for the validity of that message. In other words, the clarity of the intent in terms of meaning making was clear, but it still became contested due to alternative frames of understanding the subject matter.

Therefore, there is a need for further research in fields of contested meaning making and image composition. Such studies need to take full account of the semiotic modes used and their combination (intersemiosis). Additionally, it is important to consider the extent to which multiple interpretations are invited (or at least accepted) or if the intention is to lead the viewer to a certain understanding. In the latter case, an overlooked complexity arises when at least some viewers reject the desired framing and instead impose their own interpretations.

Funding Statement: The authors did not obtain any funding for this research.

Data Availability: All the data are included in the content of the paper.

Conflict of Interest: The authors reported no conflict of interest.

References:

1. Adel, M. (2019). The Image of Saudi Women in the Arab Press after the Launch of Vision 2030: An Analytic Study on the Sites of the Egyptian, Jordanian and Tunisian Arab Newspapers. *The Scientific Journal of Media Research and Communications Technology*, 5(5), 1-34.
2. Al-Asfour, A., Tlaiss, H. A., Khan, S. A., & Rajasekar, J. (2017). Saudi women's work challenges and barriers to career advancement. 22(2), 184-199. doi: doi:10.1108/CDI-11-2016-0200
3. Aldosari, H. (2018). Saudi Women can Drive Now. Will That Hurt Saudi Women? Retrieved 20 October, 2023, from <https://www.nytimes.com/2018/06/22/opinion/saudi-arabia-salman-women-driving.html>
4. Alhuthali, M. (2018). Interpreting Stereotypes: Images and Text. *International Journal of Linguistics* 10(4), 113-123. doi: <https://doi.org/10.5296/ijl.v10i4.13577>
5. Boghani, P. (2019). The Paradox of Saudi Arabia's Social Reforms Retrieved 20 January, 2020, from <https://www.pbs.org/wgbh/frontline/article/the-paradox-of-saudi-arabias-social-reforms/>
6. Braun, V. & Clarke, V. (2013). *Successful Qualitative Research*. London: Sage.
7. Chen, Y. & Gao, X. (2014). Interpretation of movie posters from the perspective of multimodal discourse analysis. *GSTF Journal on Education (JEd)*, 1(1).
8. Coffin, C. (2003). Exploring different dimensions of language use. *ELT Journal*, 57, 11-18.
9. Ellsworth, P. C. (2013). Appraisal Theory: Old and New Questions. *Emotion Review*, 5(2), 125-131. doi: 10.1177/1754073912463617
10. Elyas, T. & Aljabri, A. (2020). Representations of Saudi male's guardianship system and women's freedom to travel in Western newspapers: A critical discourse analysis. *Contemporary Review of the Middle East*, 7(3), 339-357.
11. George, B. (2018). HRH Hayfa bint Abdullah Al Saud Retrieved 18 October, 2023, from <https://en.vogue.me/fashion/princess-hayfa-vogue-arabia-cover/>

12. Gratch, J. & Marsella, S. (2005). Evaluating a computational model of emotion. *Autonomous Agents and Multi-Agent Systems*, 11(1), 23-43.
13. Human Rights Watch (2016a). No freedom to travel - End Male Guardianship Retrieved 2 January, 2023, from <https://www.youtube.com/watch?v=-goe4zON-XE>
14. Human Rights Watch (2016b). Trapped with Abuse - End Male Guardianship in Saudi Arabia Retrieved 3 January, 2023, from https://www.youtube.com/watch?v=hPht8rM_GaQ
15. Iedema, R. (2003). Multimodality, resemiotization: extending the analysis of discourse as multi-semiotic practice. *Visual Communication*, 2(1), 29-57.
16. Jewitt, C. (2005). Multimodality, "Reading", and "Writing" for the 21st Century. *Discourse: Studies in the Cultural Politics of Education*, 26(3), 315-331. doi: 10.1080/01596300500200011
17. Kottasova, I. & Thornton, C. (2020). Saudi female football team. Retrieved 18 October, 2023, from <https://edition.cnn.com/2020/02/25/football/saudi-arabia-football-league-women-rights-intl/index.html>
18. Kress, G. (2010). *Multimodality: A social semiotic approach to contemporary communication*. London: Routledge.
19. Kress, G. & van Leeuwen, T. (Eds.) (2006). *Reading Images: The Grammar of Visual Design* (2nd ed.). London: Routledge.
20. Lacroix, S. (2019). Saudi Arabia and the limits of religious reform. *The Review of Faith & International Affairs*, 17(2), 97-101.
21. Lannes, L. (2018). Saudi women driving, from <https://lauralannes.format.com/nyt-saudi-women-can-drive-now>
22. Lazarus, R. S. (1991). Progress on a cognitive-motivational-relational theory of emotion. *American psychologist*, 46(8), 819-834.
23. Martin, J. R. & White, P. R. (2005). *The language of evaluation: Appraisal in English*. Basingstoke: Palgrave MacMillan.
24. Nureldine, F. (2021). First saudi females football team Retrieved 18 October, 2023, from <https://www.gettyimages.ae/detail/news-photo/players-of-the-first-saudi-womens-national-football-team-news-photo/1236301181?adppopup=true>
25. Padilla, J. E. & Padilla, C. A. (2022). Multimodal Discourse Analysis of COVID-19 Vaccination Campaign Posters: Visual Grammar Approach. *Silliman Journal*, 63(2).
26. Peng, Z. (2022). A Multimodal Discourse Analysis of Movie Posters From the Perspective of Visual Grammar—A Case Study of "Hi, Mom". *Theory and Practice in Language Studies*, 12(3), 605-609.

27. Rizvi, L.J. & Hussain, Z. (2022). Empowering woman through legal reforms-evidence from Saudi Arabian context. *International Journal of Law and Management*, 64(2), 137-149.
28. Satiti, N.L.U. (2017). Representation of Muslim Women in the Western Media. *Jurnal ILMU KOMUNIKASI*.
29. Smith, C. A. & Kirby, L. D. (2001). Toward delivering on the promise of appraisal theory. In K. R. Scherer, A. Schorr & T. Johnstone (Eds.), *Series in affective science. Appraisal processes in emotion: Theory, methods, research* (pp. 121-138). New York: Oxford University Press.
30. Steinberg, J. (2018). Saudi women driving ban Retrieved 2 January, 2023, from <https://www.nytimes.com/2018/05/25/opinion/saudi-arabia-salman-womens-rights.html>
31. Symon, G. & Cassell, C. (2012). Assessing qualitative research. In G Symon & C Cassell (Eds.), *Organizational Qualitative Research: Core Methods and Current Challenges*. London: Sage.
32. Young, J. (2018). Vogue Arabia cover featuring Saudi princess sparks backlash Retrieved 18 October, 2023, from <https://edition.cnn.com/style/article/vogue-arabia-cover-intl/index.html>

Politics of Secularism in Ethiopia: Repression or Co-option towards the Ethiopian Orthodox Tewahido Church?

Dereje Melese Liyew

Lecturer, Political Science at Debre Markos University, Ethiopia

[Doi:10.19044/esj.2024.v20n11p33](https://doi.org/10.19044/esj.2024.v20n11p33)

Submitted: 22 March 2024

Accepted: 11 April 2024

Published: 30 April 2024

Copyright 2024 Author(s)

Under Creative Commons CC-BY 4.0

OPEN ACCESS

Cite As:

Liyew D.M. (2024). *Politics of Secularism in Ethiopia: Repression or Co-option towards the Ethiopian Orthodox Tewahido Church?* European Scientific Journal, ESJ, 20 (11), 33.

<https://doi.org/10.19044/esj.2024.v20n11p33>

Abstract

Secularism in Ethiopia has not been practiced as stipulated in the 1995 Constitution of the Federal Democratic Republic of Ethiopia (FDRE): separation of state and religion. Instead, consecutive regimes, since the introduction of secularism, have employed a tactic of co-option and repression towards the Ethiopian Orthodox Tewahido Church (EOTC) to meet their political objectives. This research article addresses the nature and manifestation of government intervention in the EOTC through either co-option and/or repression, with a special emphasis on the post-2018 regime. The study argues de-facto secularism in Ethiopia is far from the essence of separation of state and religion; it is a new version of religion industriously implemented by governments to upgrade the Orthodox Church in a way that fits with the political system. The secular regimes co-opted and repressed the church conditionally at any cost to the institution through a Machiavellian approach. The study also finds that the prosperity-led regime was actively involved in the internal affairs of the church in the early days through co-option in the name of reconciliation with the exile synod. In the later days, via repression, massive killings of orthodox followers, burning of churches, and restrictions on the church's annual ceremony, as in the case of Epiphany and Meskel (Demera), the regime oppressed the church.

Keywords: Secularism, politics, religion, co-option, repression, EOTC

1. Introduction

Ethiopia has practiced a de jure secular political system for almost half a century. Following the disposal of the age-old monarchical system in 1974, secularism became one of the guiding political principles of the republic. As was common anywhere in the then Christian states, the state and the church in Ethiopia were tightly intertwined, with one buttressing the other in both spiritual and civil administrations for millennia. The ancient monarchs claimed divine justification for their wars and empires and demonstrated religious devotion as a key ingredient of legitimacy for the state (Jorgen, 2009). The blurred or theocratic nature of the interaction between the state and religion in pre-1974 Ethiopia is not an exception.

Among the immediate reactions of the Military Regime (1974–91), the adoption of secularism, constitutionally introducing a separation between the Ethiopian Orthodox Church and the state, is worth mentioning. The Derg regime, which adopted socialism as its peculiar ideology, had, of course, an anti-religious approach that considerably affected all religions. The regime particularly reacted to EOTC oddly; politically, the regime persecuted the highest officials (including the murder of his holiness Patriarch Theophilos) of the church, nationalised its properties, and condemned the church as old age wished to be collapsed (Tsegaye, 2020). Notwithstanding the adoption of secularism and hostile reactions to the church, religion continued as a solid political apparatus in socialist Ethiopia, and the regime engaged in manipulation of the institution for political ends.

The coalition of identity-based liberation movements overthrew the 17-year-old regime, full of civil war and uncertainty, in 1991. The coalition of the liberation fronts called the Ethiopian People's Revolutionary Democratic Front (hereafter EPRDF) confirmed the de jure secular political landscape in the 1995 Federal Democratic Republic (FDRE) constitution. Article 11 of the FDRE constitution clearly stipulates "the separation of state and religion," secularism otherwise. Additional provisions on religious equality and freedom are also inculcated. Although the constitution prohibits state intervention in religious affairs and vice versa, the regime tightly regulates every activity of religious institutions, in this case the EOTC. The two regimes did subscribe not only to the Habermasian secularist idea of the public area of rational thought but also to the idea that religions were considered irrelevant and unfitting with their communist ideology (Ostebo, 2023). This is shocking progress for societies like Ethiopia with strong obedience to religious dogmas. With an intention to secure their political power, the EPRDF made an unreserved effort to regulate and subordinate different religious institutions (Haustein and Steb, 2011), which is in clear contradiction to the provision stated in Article 11 of the FDRE constitution. The regime clearly showed strong involvement in the appointment of the patriarch. Most evident is the

replacement of the patriarch in 1991 (ibid.), which was driven by a conflation of government and church politics.

The post-2018 political transition under the leadership of Abiy Ahmed gives room to religious discourse in Ethiopian politics. Unlike the previous regime, the premier uses religious languages of hope, loyalty, and love to induce his vision of a new Ethiopia (Haustein and Dereje, 2022). He was also actively involved in the religious affairs of the Orthodox, the Muslims, and evangelicals; he also played roles in the reconciliation process between the principal synod and the dissident one. In contrast, the Prosperity Party (PP)-led government condemned it for supporting schism in EOTC, mass killing of Christians, demolition of churches in Oromia Regional State, and other parts of Ethiopia. Notwithstanding the constitutional provision to protect religious institutions from the coercive powers of the state, the Abiy Ahmed regime in one or another way intervenes in EOTC through repression and to some extent, via co-option for political ends. Thus, the very objective of this study is to scrutinise the nature and manifestation of government intervention in EOTC through cooption, and/or repression, in contrast to Article 11 of the FDRE constitution, which has special coverage of the post-2018 regime.

2. Research methods and materials

Ethiopia installed a de jure secular political landscape in 1974. However, in Ethiopia where religions have significant weight, practicing assertive secularism¹, as mentioned in the 1995 FDRE, is tough business and impractical. As a result, the past three consecutive regimes (the military regime, the EPRDF, and the PP) have been strongly involved and interfered in varying degrees in religious institutions to achieve their political ends or garner legitimacy. This paper intends to examine the nature and extent of state intervention in EOTC. To address the issue under study, both primary and secondary sources were well consulted. As it is a live issue, consecutive press releases from EOTC on the schism, the killing of orthodox followers, and the burning of churches were reviewed. Press conferences held by the government, opposition political parties, and human rights commissions regarding EOTC's splits and religious conflicts were also analyzed. Domestic and international media outlets, too, were considered. The consecutive annual reports of International Religious Freedom (IRF) (2018-2022) are critically reviewed. Secondary sources, such as scholarly articles on secularism, journals studied by religious institutes, and other relevant data, were taken into account.

¹ Assertive secularism is a "comprehensive doctrine" that aims to eliminate religion from the public sphere (Kuru, 2007).

Thematically, the research article tried to scrutinize state manipulation and repression of religious institutions, with a special focus on EOTC, either through co-option, repression, or both since the onset of secularism, with a wide coverage of the post-2018 regime. The Machiavellian approach towards religion is employed to examine the nature of Abiy Ahmed's regime intervention towards the EOTC.

3. Glance at the Secularization Thesis: Tri-dimensional Understandings

In analyzing the politics of secularism in the EOTC, it is sound to identify the practical interpretation of secularism in line with the issue under study. Accordingly, three conceptual underpinnings are discussed here.

The Wane of Religion in Society:

This thesis perceives secularism as a lifestyle that is at odds with a supernatural power, God or Allah. It is an assumption whereby society as a group is committed to a just world order and a moral program of individual action that would address human problems without the use of supernatural explanation (Swatos and Christiano, 1999). Secularization in this understanding therefore implies the decline of religion; that is, religions previously accepted symbols, doctrines, and institutions lose their prestige and influence. Speaking otherwise, mystery or religious thoughts are something to be conquered by human reason, ingenuity, and the products of technology.

The wane of religion is believed to happen due to modernization, technology, and the increment of rational thinking. In the words of Roberts (2004:306), secularization is "the transformation of a given community with high institutional transformation and institutional freedom from religious influence and making more rational, empirical decisions by individuals and groups." It is making religion the lowest common denominator and thus establishing a political ethic independent of religious convictions altogether. Weber (1994) also claims trust in divine power has lost trust in providing secured solutions to social and economic problems, and in contrast to a heavenly bank account, earthly and tangible economic actions have come to play an increasing role in measuring the worth of knowledge.

Secularism: the New Religion

The second contending conception of secularism is about a new religion capable of providing rational answers to the psych-social and politico-economic questions of modern societies. Accordingly, secularism is a replacement for old religion; it is in itself a belief with its own discourse. Proponents of this thesis insist that religions are declining as societal transformation increases; secularism is not a simple political philosophy, but

it intends to replace the age-old religion by promoting rational thinking and the freedom of individuals (Shafi, 2023). Thus, the freedom of individuals is at the heart of secularism as a new religion. It considers human beings as holy, and fulfilling human needs is prominent; in contrast to so-called traditional religions, homosexuality, and LGBT are considered individual freedoms to be protected.

Secularism is a manifestation of the "new religion" of reason that emerged in the Enlightenment period, which, at least in its early forms, identified rationality with Divinity and was found in the pursuit of knowledge, a spiritual quest (Swatos and Christiano, 1999). It is a kind of belief that best fits with the current rapid modernization. The rise of a new spirituality, secularism, today suggests that the institutionalised alternatives are the heirs of the Church of Reason. The old sacred vistas fail to answer the contemporary human psyche. Thus, the new paradigm or new sacred vista (secularism) is championed in a way that is relatively consistent with the sociocultural conditions imposed by high technology and multinational capitalism (ibid.). Thus, secularism is the new denomination of religion preferred in this century and beyond. The establishment of this new religion is not eliminating religion, yet secularised religion will be the leading religion of the 21st century and beyond (Shafi, 2023). This is due to the modern rational scientific age of enlightenment, which would replace religion as the basis for understanding and running the world. Governments that wish to renew religious canons in a way that fits with their political ends are more likely to have employed Turner's upgrading principle. Upgrading is reforming or secularizing religion in a way that fits with the contemporary assumption of democracy (Turner, 2007). Shortly, it is the secularisation of religions so as to make them fit into the current development.

Separation of State and Religion:

The separation of state and religion is the most pronounced and conventional conception of secularism in the mouth of the so-called secular government. However, secularism, as a principle that tries to restrict the public function of religion, is not a single magic formula applicable all over the world for all religions and states. It is understood as having no government support for religion and no government interference in the religious practices of both the majority and minority religions in a state (Fox, 2006).

Concerning the very objectives of secularism as a separation of state and religion, Mohammed Dejen (2018) noted as follows:

Secularism was introduced to achieve the following major purposes: firstly, to protect the state from excessive religious influence, which is freedom for the state; secondly, to protect religion from the coercive

powers of the state, which is freedom for religion; or lastly, to manage religious diversity.”

So, the separation of state and religion, as a concept of secularism, is about no state religion and no religious state being accepted. In the same vein, Article 11 of the FDRE constitution clearly confirms that “religion and state are separate, and there shall be no state religion; the state shall not interfere in internal religious matters, and religion shall not interfere in state affairs².”

4. Machiavellian’s Approach Towards EOTC

Niccolo Machiavelli (1469-1527), an Italian Renaissance political philosopher, statesman, and secretary of the Florentine Republic, weighed religions in their extrinsic values. He views religion as a useful instrument in the hands of the prince to technically exploit it for the ends of the state and for the sake of peace and security. In his masterpiece work, the Prince, Machiavelli, insists that religion should be exploited for the sake of political expediency; otherwise, religion and politics should be kept separate, with religion always being subordinated to politics (Zorn, 2009). In the same spirit, the consecutive regimes of Ethiopia since the introduction of secularism have harnessed the Ethiopian Orthodox Church as an instrument and recourse for their political objectives.

The Military Regime (1974 -91): Execution of the Patriarch

The Ethiopian monarchs, for millennia, gave the Ethiopian Orthodox Tewahedo church a significant position in the politics of the state. The coming to power of the military regime, however, brought radical political transformation. The adoption of secularism was among the primary reforms taken by the military junta, which officially announced the separation of the state from the Orthodox Church. Though the regime is atheist and secular, it employed a bi-dimensional policy of co-option and heavy-handed repression in order to spread its ideology and control rural localities (Ancel and Ficquet, 2015).

The Marxist regime, under the leadership of Mengistu Haile Mariam, caused both epistemic and physical damage to the EOTC. In the name of orchestrated corruption and committing acts of injustice with counter-revolutionary elements, the Derg regime deposed and later executed Abuna Tewoflos in August 1979 along with other top imperial officials (Haile, 1986), leaving a bloody footprint in the history of the church. The new patriarch (Abuna Takla Haymanot, elected in 1976), an appointee of the ad hoc committee, is undoubtedly apolitical with rigorous ascetic practice and selfless

² The 1995 Federal Democratic Republic of Ethiopia Constitution, Article 11

philanthropism and an ideal choice for those in power, for he is a man in but not of this world (Ancel, 2011). Besides the appointment of a new patriarch at the expense of the church canon, the regime forced the retirement of the so-called old-regime member bishops. The bishops appointed during the time of Haile Selassie were not seen as the best leaders to manage the reform of the church; thus, out of fourteen bishops in 1978, only three could keep their positions (ibid.).

The expropriation of church land, the main economic base of the institution, in 1975 was also against the very institutional existence of the church. Some of the scripture of the Orthodox Church was collected and burned by the regime's direct order, perceiving the books as being used to exploit and oppress other Ethiopian people during the past feudal regime (Solomon, 2021). The regime also ordered the press and media to frequently repeat that EOTC and its system hindered the freedom of the Ethiopian people (Doulos, 1986). However, the role of the church in the victory of Adowa and other independence wars is by no means underestimated. The regime committed unlimited and shameful damage to the church and its followers. Implicitly, the big and famous Orthodox churches (cathedrals) were made into an exhibition hall as a historical emblem for the oppressed people by the regime by September 1982 (ibid.).

The new patriarchate then began consecutive training in all dioceses to order the priest and the follower to indoctrinate the compatibility between the Holy Bible and the ideology of socialism (Haile, 1986). The skillful exploitation of the holy patriarch to make him an instrument of the anti-orthodox movement and to scout by the carefully selected persists and other workers to induce the illusion of compatibility between Christianity and communism was practiced against the interest of the Church. Through systematic co-option, the church was highly manipulated for political and ideological indoctrination in favor of the military junta. Politically, the church excommunicated the insurgent groups and subverted the allegiances of rebels' followers, and ideologically, the church laid the foundation for the acceptance of the regime and to keep the status quo (ibid.). Through the deployment of heavy-handed repression, the military dictatorship posed indelible interference in church services. Speaking in other ways, the government seems to have taken a two-pronged approach toward the Ethiopian Orthodox Church, appropriating and attacking the church at the same time (Haustein, 2009). In its reign, the regime industriously worked to curtail the EOC's influence through policies of religious freedom and the secularisation of education, while attacking the Orthodox Church and leadership as reactionary aides to the old feudal order. The bad experience is that the church's reaction to this epistemic and physical damage was fragile, as the Marxist regime structurally oppressed it and systematically co-opted the church officials.

The EPRDF Regime (1991-2018): Dissident Synod Created

Tigray People's Liberation Front (TPLF), the mastermind and founder of EPRDF, used the Orthodox Church and parish priests to win the war against the military regime and later to induce its Marxist-Leninist political ideology. A renowned founding member of the TPLF and an author, Aregawi Berehe (2008:302), insists that:

“Seminars for priests were conducted by an eloquent TPLF fighter, GebreKidān Desta, to replace the Ethiopian Church's authority by a TPLF-minded church. A scout under the leadership of Sibhat Nega infiltrates the age-old monasteries in Tigray, like Debre Damo, by planting TPLF member cadre monks to control the activity of the church in favour of the party. A separate secretariat of the Orthodox Church was formed in the liberated areas of Tigray, and thus, in practice, the Ethiopian Church was divided into two separate secretariats, one under the regime and the other under the TPLF.”

Following the collapse of the Derg regime in 1991, the TPLF-led regime deposed the then-patriarch Marqorewos in 1992 and forced him to live in exile. However, it was not proved until Wikileaks³ revealed the direct involvement of the regime in dethroning the patriarch. Tamerat Layne (ex-Prime Minister of Ethiopia, 1991-95) confessed to Donald Yamamoto, who served as U.S. ambassador to Ethiopia (2006-2009), that he regretted the action he took towards EOTC because he signed the order to remove and replace the original patriarch and the split of the church (Wikileaks, 2012).

The new patriarch of the new regime, Abuna Paulos, was enthroned on July 12, 1992. The exile synod also insists that the election of Paulos, who is a Tigre like most high-ranking government officials, was an orchestrated coup by the EPRDF (Haustein and stebø, 2011). Of course, it was meaningful in several interpretations. His Tigrean origin was an unambiguous indication that authority had shifted to a new ruling elite, and his election was also presented as the reinstatement of the righteous succession to Abuna Tewoflos (Ancel and Ficquet, 2015). The cadre in the new regime wanted a church leader at the top who shared their political vision, and thus Father Paulos seemed to fit with the system (Walle, 2013). For the first time, the Holy Synod of the EOTC is clearly divided into two parts through the direct action of the regime: the home synod under the authority of Patriarch Paulos and the dissident synod in the United States under the authority of Marqorewos.

The TPLF-led regime exploited the Orthodox Church from cave to palace for political ends. Its interference in religious institutions was guided by the divide-and-rule strategy of the colonial era (Østebø, 2023). The ruling

³ An international, online organisation launched in 2006 that publishes private, secret, and classified information from anonymous news sources, news leaks, and whistleblowers.

cadres have been monitoring religious spaces carefully and have multiple times interfered with internal religious matters (Haustein and Steb, 2011), in contradiction to Article 11 of their constitution. The political landscape of the regime posed diverse challenges to the Church: the separation of the Eritrean Church, the schism of the diaspora community, and the competition with other Christian denominations in a newly opened religious “market” (Ancel and Ficquet, 2015) are worth mentioning.

5. Co-option and Repression Towards EOTC: Under the Abiy Ahmed Premiership

Schism within the EPRDF, coupled with popular pressure, resulted in two significant political events in 2018: the resignation of ex-prime minister Haile Mariyam Desalegn, followed by the elimination of the TPLF from the political power center. The dominant party, EPRDF, was demolished, and the new one, Prosperity, under the premiership of Abiy Ahmed, was installed.

The Prosperity-led regime has practically employed both tactics of co-option and repression towards EOTC to secure its political power. Co-optation is using religion to support the already-installed system, while repression is an act of subduing, intimidating, and outlawing religious associations, groups, or figures that are considered to be a threat to state power (Serawit, 2018).

Abiy Ahmed’s Co-option in the Sandals of Machiavelli

Since his appointment, Abiy Ahmed, the prime minister, has used semi-religious vocabulary in his public speeches. He was also actively involved in internal religious affairs; he took part in the reconciliation of the EOTC with the exile synod and also in the reconfiguration of the Ethiopian Islamic Affairs Supreme Council. He has thus tried to co-opt religious institutions by including religious thought in public speeches. That is why he wraps up his public addresses with the phrase “God bless Ethiopia and its entire people.” In his early days, the prime minister played a prominent role in the reconciliation of the exile synod with the principal one, and in his effort, the church praised him in advance. Besides, he frequently underscores the importance of the Orthodox Church for Ethiopia.

In his speech at the reconciliation conference of the church, he noted that “We cannot think of Ethiopia without the Orthodox Church; the Orthodox

Church is in itself a country⁴.” Similarly, in the forum of the Prosperity Party, he affirmed that “orthodoxy is a country, a heritage, and shall be protected⁵.” Abiy’s active presence in the EOTC and other religious institutions in general, however, is claimed as an instrumentalist co-option to utilize the church for his political ends in the spirit of Niccolo Machiavelli. An Italian political philosopher, Machiavelli, insists that religion shall not be ignored; the church and religion serve as an instrument for creating national customs and habits for creating national thought to preserve peace and order (Mansfield, 1985). Thus, he magnifies the extrinsic values of religion for political ends. In the same parlance, Abiy Ahmed (2021), in his book entitled “Medemer⁶ Journey,” argues that:

“Controlling religion is controlling the people; the people of Ethiopia are tightly loyal to their religion. Both Islam and Christianity are strictly adhering to their religious dogmas. Thus, controlling these religions creates fertile ground to control the public; this in turn helps to regulate the political landscape, legal institutions, and other social values.”

Accordingly, the post-2018 cadres following the footprint of the prime minister inculcate religious languages in public spaces against the principle of assertive secularism stated under Article 11 of the living FDRE constitution. The premier shows intent to systematically co-opt with religions, which is why his religious remarks are sometimes confusing, and he tends to adjust his language according to his audiences (Østebø, 2023) mainly to garner the most political support from the religious groups, and which was successful.

Does the prosperity regime suppress EOTC?

Notwithstanding the nature and type of government interventions in religious affairs, the post-2018 regime gives space to religion and its rhetoric in its political discourse. Beyond co-option, the prosperity regime also devised different tactics to limit religious institutions in general and EOTC in particular in the public space. In what follows, the researcher critically examines whether the church is oppressed or not.

⁴ Dr. Abiy Ahmed’s Speech at the Reconciliation Conference of the Orthodox Church.” YouTube, July 26, 2018. <https://youtu.be/83yinHVMYUa?si=pcdPUa7p7arf4D19> (accessed on December 24, 2023).

⁵ Dr. Abiy Ahmed Speech at the prosperity party conference, broadcast on EBC, March 13, 2022. <https://youtu.be/RSJb3WkcEKg?si=whfm4WQsTTPenhCV> (accessed on December 24, 2023)

⁶ Amharic word equivalent with Synergy

Schism in the EOTC: Government Response

Though the schism in the church has a backstory or precedent⁷, the ordination of the 26 new bishops without the knowledge of the Holy Synod on January 22, 2023, in the Oromia region by the three Orthodox Archbishops was blowing news to the church and the faithful at large. The leader of the so-called “Synod of Oromia and Nations and Nationalities” defended that “the schism was as a result of Oromo’s unfair representation in the position of the EOTC synod and failure to use Oromo language in the church services⁸.” However, as Desta Heliso commented on Addis Standard (2023), the issue behind the split led by the bishops is highly motivated by political motives, not religious ones, manifested by ethnocentric goals. Although the principal synod excommunicated the three bishops and the newly ordained 25 episcopates, the new synod appointed its bishops in different dioceses by militant takeovers of these churches.

The reaction of the Prosperity-led regime during and after the schism in the Orthodox Church, however, is claimed by the church and other actors as repression against the legal personality and very existence of the church. The government forces, specifically the Oromia special force, and police, were involved in the takeover of the churches at the expense of the age-old Orthodox Church (Addis Standard, 2022). The Human Rights Commission of Ethiopia has also confirmed the excessive use of force by the government security forces during such clashes in Shashemene, the capital of West Arsi Zone⁹.

The Holy Synod, in reacting to the government action, insists that “the reality on the ground is that the casualties or schism were committed through the direct support of the regional government; this shows the government’s interference in the internal affairs of the church against the constitution, which is a coup d’état on the synod¹⁰.” In principle, the government is responsible for protecting the church and its faithful as a legal person from illegal ones. However, in practice, the special force, under the auspices of the regional government led by Shimelis Abedesssa, was directly involved in the breakaway of the church gates and the killings of and faithful in the daylight. Opposition political parties also exposed the unnecessary government intervention in the church’s internal affairs at the expense of the principal Orthodox Church. The Ethiopian Citizens for Social Justice (shortly called E-

⁷ A head of the formation of The Synod of Oromia and Nations and Nationalities, there was a movement and progress to establish the so-called *Oromia bet-kihinet* that laid foundation for the schism

⁸ Briefing paper by the peace research facility and Rift Valley institute on March 2023 entitled Religion, Politics and the State in Ethiopia.

⁹ Press release of EHRC cited from Addis Standard on 4th March 2023

¹⁰ Press Release of the Holy Synod on the schism

ZEMA) in a press release related to the schism condemned the government: “We are concerned with the measures taken by the security forces in contradiction to Article 11 of the constitution¹¹.” The party also noted that “recently, we have observed the intervention of the government in the internal affairs of the church in different aspects, potentially resulting in bad consequences.” Thus, the incumbent regime does not abide by the principle of secularism stated under Article 11 of the Constitution.

Beyond a simple intervention, there are groups accusing the government of having the intent to oppress and eliminate the ancient Orthodox Church from the politico, economic, and social arenas of the republic. “Through infiltrating ethnic entrepreneurs in the church, the government is working indirectly and industriously to dismantle the very institutional existence of the Orthodox Church¹².” In similar ways, the Amhara-affiliated association called the Amhara Association of America (AAA) insists that the attack under the leadership of the government up on the church is part of Abiy’s regime plan to demolish an icon and marker of Ethiopian unity¹³.” Such accusations, however, are not from scratch; the regime shows intent in different trainings to upgrade the religious thought of different religions in a way that fits with the political ideology of prosperity, synergy otherwise. René Lefort (2020) commented that the prosperity-led regime under the auspices of Abiy Ahmed, in contradiction to the principle of secularism, aims to “pentecostalism Ethiopian politics¹⁴” or indoctrinating prosperity gospel. The split in the Orthodox Church and officials’ presence at the back door of the schism is not solely limited to the so-called Synod of Oromia and Nations and Nationalities, but in other regions too.

On May 7, 2021, another threat to the oldest institution happened. In Tigray, regional state bishops disclosed the establishment of a new patriarchate, so-called “the see of Selama Kesate Birehan. The justification, they insist, is the failure of the Holy Synod to defend the killing of the clergy and the destruction of churches and other religious heritages during the war between the central government and the TPLF (Addis Standard, 2023). On July 23 and 30, 2023, the new synod in Tigray appointed nine bishops, followed by excommunication by the principal synod.

The role of the TPLF in the formation of the patriarchate is not underestimated. The Holy Synod, in a press release, insists that “this illegal organisation has been planned for a long time; the Holy Synod recognised that

¹¹ E-ZEMA press conference on 31st January 2023

¹² Enat Party press release on 24 June 2023

¹³ Press release from AAA on 6 February 2023

¹⁴ A commentary by René Lefort on December 24, 2020 on Ethiopian Insight: <https://www.ethiopia-insight.com/2020/12/24/mind-over-matter-abiy-ahmeds-aim-to-pentecostalize-ethiopian-politics/>

it was organised by individuals who were carrying out a deep-rooted hidden agenda with the help of political and government officials from time to time¹⁵.” Of course, TPLF’s manipulation within the church is a day-to-day reality. An "intelligence group" was formed to scout out the church's main monasteries and administrative structures that would help their mission's accomplishment (Aregawi, 2008). Thus, the see of Selam Kesate Berhan is an extension of the TPLF’s early-day manipulation of the church. That is why the regional television (Tigray TV) live broadcast¹⁶ the appointment of the bishops. This is therefore another sound testimony that the regime is marching against the very unity of the Ethiopian Orthodox Tewahedo Church.

Besides the above-mentioned factions, there are also groups who appointed themselves as bishops in East Gojjam Diocese and Qoga Kidane Mihret Monastery. In an urgent meeting held on June 9, 2020, the Holy Synod deprived them of ecclesiastical power, thus restricting them from serving in the church. The Synod further established a nine-member committee to see the details of the issue. The split, however, remained unresolved. This faction called themselves the “Ancient Orthodox Church,” while others labeled them “Qibat believers,” and the split is interwoven with the age-old debate over the teachings of Christology.

	Synod of Oromia and Nations and Nationalities	The see of Selam Kesate Berhan	Ancient Ethiopian Orthodox Church ‘Qibat’
Precedent	The formation of the Oromia patriarchate within EOTC	TPLF’s manipulation of the church since its gorilla war	The entrance of Portuguese soldiers in support of the war against Ahmed Grange
Perceived Cause	Issues of language usage and ethnic proportion in the principal synod	Silence of the synod during the war in Tigray	The age-old debate over the discourse of Christology_ dogma
Government reactions	Involved in the takeover against EOTC	The regional government implicitly supports and broadcasts the appointment.	-
EOTC reaction	Excommunication	Excommunication	Excommunication
Location	Oromia Regional State	Tigray Regional State	Amhara Regional State

Table 1. Summary of the nature and government reaction to the schism in EOTC

¹⁵ A press release by the EOTC on August 2, 2023, accessed from the official Facebook page of THE EOTC media agency.

¹⁶ Broadcast on Tigray TV on August 3, 2023; retrieved on December 28, 2023. Link: <https://www.youtube.com/live/aE4AvTgs0NA?si=VDT2W8y7qZfWrzWx>

Casualties in the Church and the Faithful

In the consecutive years since the onset of the 2018 political reform, the killing of orthodox Amharans and the burning of orthodox churches have been clearly observed and confirmed by domestic and international organisations and authors in the area. “There was violence towards Ethiopian Orthodox clergy and believers in different areas of the country, which led to increasing concerns about Abiy’s inaction in protecting the faithful¹⁷.” Similar to this argument, Tsegaye (2020) also confirms that massacre, displacement, oppression, and harassment of Christians, the burning of churches and the prohibition of public Christian ceremonies are frequent adversities for Orthodox Christians in current Ethiopia.

Reports also revealed that in the quarters of EOTC, there is increasing discontent over the failure of the regime to give legal protection to Orthodox Amhara from recurrent damage and religious violence¹⁸. A U.S.-based international organization; International Religious Freedom (IRF), reports the status of religious freedom in every country annually. Accordingly, the report from 2018 up to 2022 shows a wide range of damage to the Ethiopian Orthodox Church and its followers, as summarised in the below table.

Year	Month and date	Region	Casualties
2018	August 4	Somali, Jigjig town	Six priests were killed, and eight churches were burned.
	August 9	Amhara, North Wollo (Woldia)	8 killed and 16 wounded
2019	July 18	SNNP, Sidama Zone	1 priest and 2 followers were killed and 3 churches were buried.
	October	Oromia	Eight follower were killed.
2020	September 6,7, and 13	Benshangul Gumuz	80 killed, 1 church buried, 600 members forced to flee, orthodox markers demolished
	August 26–September	Oromia	500* people were killed following the killing of singer Hachalu Hundessa.
	January 19/20	Dire Dawa	1 killed, 21 injured
	November 1	Oromia, Gawa Qana	54 killed, predominantly Christian
2021	November–April	Tigrai	78 priests were killed.
	March 5	Oromia	29 killed at Abo Church, East Wollega

¹⁷ A briefing paper by the peace research facility and Rift Vally Institute in March 2023 entitled Religion, Politics, and the State in Ethiopia

¹⁸ ibid

	November 28 and 29	Tigrai	800 civilians in the Marry of Zion festival
2022	January	Oromia	3 were killed at Woybela Mariyam Church, and 10 were injured.
	October	Oromia	1 deacon was killed and 11 worshippers were kidnapped.
2023**	December	Oromia, Arsi Zone	72 people killed in the burning of houses.
Total casualties			1641 killed, 12 churches burned, etc.

*The Oromia police force reports 239 killings, while the Barnabas Fund reports 500.

** sourced from the EOTC press statement on December 5, 2023.

Table 2. Summary of the annual reports of the IRF showing damage to the Ethiopia Orthodox Church (2018-2022)

The report of the IRF thus shows how much the church has been at risk since the coming of Abiy Ahmed’s regime. Leave alone the unreported damage (due to blockage of telecommunication, internet, and transport); taking the data from the IRF only, thousands of priests and followers are killed because they are orthodox followers, dozens of churches are burned; and thousands are displaced. The damages mentioned are committed by the security force or the failure of it to keep citizens from the illegal militant groups, especially the Oromo Liberation Army (OLA)–Shane and Gumuz militants. In a press release, the Enat Party condemned the government: “in the local government structures of Oromia regional state, officials are directly and indirectly involved in the mass killing of the faithful, and the system is the orchestrator of the genocide, so we are not claiming justice from the criminals¹⁹.”

The Politicisation and Ethnicization of EOTC

The overthrow of the monarchy and the introduction of secularism in 1974 boldly diminished the influence of the church in the state. Beyond its role as a religion of the state, the Ethiopian Orthodox Church was exposed to multiple attacks, perceiving it as a prominent part of the monarchy's power structure (Mohammed, 2018). The church is thus accused of double trends; it is perceived as an instrument of oppression of the age-old monarchy; and in other ways, ethno-nationalists since their inception propagate as if it is the religion of a single ethnic group, Amhara otherwise. Speaking otherwise TPLF/EPRDF elites covertly narrated just as the EOTC was serving as a tool used by the Amhara ethnic group to oppress other Ethiopian ethnic groups

¹⁹ Enat Party press release on November 20, 2023, on the killing of 35 orthodox believers on November 23 and 27 in Oromia region, East Arsi Zone, Sherka woreda.

(Solomon, 2021). Hammering the Amhara ethnic group and EOTC in the same name is evident, but wrongly installed by ethnocrats.

The church is misinterpreted and misrepresented mainly by Tigrian and Oromo ethnic-nationalists in different aspects, including its spiritual or doctrinal issues, evangelization activities, clergies and bishops, cultural legacies, and the relationship it had with the state (Tsegaye, 2020). However, in the reach of the researcher, the dogma and canon of the church are indiscriminate to race, ethnicity, sex, and the like. Indeed, it is true that most Amharas are early orthodox believers, but that does not mean that all Amharas are Christian orthodox. And it also does not mean that there are no other ethnic groups that are Orthodox Christians.

Extreme ethno-nationalists of Oromo defined Orthodox Christianity as a religion of the Abyssinians (the Amharas) and perceived the church as racist to the Oromo nations (Asafa, 2004). It is arguable that the politicisation of the church coupled with identity politics escalates attacks on the church, and its followers. Ethnic entrepreneurs understood the church's spiritual mission as an instrument of "colonisation" and "destruction of indigenous peoples. They also associate poverty with the church, arguing that "the cause of poverty in the Oromos is assumed to be related to the occupation of a large proportion of land and veneration of saints by the EOTC (Gebru, 1993). Ethnic nationalists therefore see the EOTC as the enemy of their ethnic group. "Oromo nationalists, for instance, built Oromo nationalism against these features: the Orthodox Christians, Amharic language, and Amhara culture" (Solomon, 2021).

The ethnicization and politicisation of the EOTC are not without violence; instead, they are causing both physical and epistemic destruction to the EOTC and its believers (ibid.). The casualties among the faithful, sometimes supported by governmental apparatus and Islamic political fundamentalists, frequently occurred in different parts of Oromia, Gedeo, Jigjiga, Sidama, and Benishagul Gumuz, particularly between 2017 and 2020²⁰. The politicisation, murdering, and oppression of Christians, the burning of churches, the confiscation of public Christian holiday places, and the like are increasing from time to time, partly because of the collaboration and negligence of local government authorities (Tsegaye, 2020). In a nutshell, either by the direct involvement of the government or failure to protect the church and its followers, the post-1974 system is oppressing EOTC against the principle of religious freedom.

²⁰ BCC Amharic news: <https://www.bbc.com/amharic/45080641> , accessed on January 2, 2024.

Enclavement of the Orthodox from Political Power

Another symptom of oppression is the systematic elimination of orthodox followers from high-ranking political positions, or what Turner calls enclavement. It is a physical exclusion of certain religious groups that are perceived as a threat to the incumbent regime. Enclavement is a technique to regulate a specific religious group that potentially includes a strategy of exclusion with an intention to limit certain religious groups (Turner, 2007) from socio-political and economic involvement.

In terms of religious demography, the EOTC takes the absolute lead. According to the estimate for 2016 by the U.S. government, 44 percent of the total population are followers of EOTC (IRF, 2022). That is if the Ethiopian population is 120 million, half a million or so are orthodox followers. The World Population Review (2023) also confirms that 44 percent of Ethiopia's population adheres to the Ethiopian Orthodox Church. So, even though the political landscape does not allow religion-based power distribution, the de facto presence of religious proportion in political positions in a country where religion is highly valued is mandatory to create a sense of belongingness and cultural equality. The systematic elimination of certain religious groups in the name of secularism from key political positions is repression or the intent of enclavement. Keeping their personal privacy, the researcher undertook a snowballing survey on the respective religious affiliations of top government officials, focusing on the executive organs of the government: 24 ministers (including the prime minister and the two deputy prime ministers), the chief executive of the 13 regional states, and the mayor of the two special cities, Addis Ababa and Dre Dawa.

Position	Orthodox	Muslim	Evangelical	Others
Cabinets: 24 ministers	16.6%	45.8	37.5	-
Chief Executive of Regional State/ President/ including Dre Dawa and Addis Ababa, 15	13.3%	46.6	40%	-
Demographic ratio*	44%	31%	23%	2%

*International Religious Freedom Report, 2022

As shown above, in a country where 44 percent of the total population are orthodox Christian followers, the first three key political positions—the prime minister and the two deputy prime ministers—are non-orthodox. And only 16.6% of the cabinets are Orthodox, while 46.6% are Muslim and 37.5% are Protestants or Evangelicals. Such a takeover of key political positions, potentially at the expense of the orthodox followers, is not a simple political calculation, unless it is repression. In addition, of the 15 key positions of chief executive of a regional state (including Addis Ababa and Dre Dawa), only 13.3% of orthodox people lead the regional state, while 46.6% and 40% are

Muslim and evangelical, respectively. Such a political manoeuvre, the researcher argues, is not abruptly happening but with an intention to physically distance orthodox believers from key political decisions, who could potentially challenge government oppression against the orthodox discussed in the aforementioned sub-sections.

Concluding Remarks:

The introduction of secularism in Ethiopia (the assertive kind) was not properly done. This is evidently clear after we consider the huge societal values that religion imparts to the general society. Curtailing religion in the public sphere, where 98% of the population is its faithful adherent, is not only impractical but also deprives it of its significant contribution to socio-economic development and national security. As a result, the consecutive regimes failed to practice secularism as stated in their constitutions. Instead, they tightly regulated religious institutions through the deployment of co-optation and oppression.

The military regime, in the name of secularism, committed physical and epistemic casualties on the ancient and huge Orthodox Church. The execution of the holy patriarch, Father Tewoflos, is unforgettable in the eyes of the church. The regime sometimes co-opted and, at other times, oppressed the church to indoctrinate socialism as a political ideology at any cost to the church. The TPLF-led EPRDF regime had also matched against the EOTC from cave to palace and exploited it through the systematically recruited cadre priests, cadre-bishops, and intelligence groups. Sadly, the regime replaced the patriarch and forced the principal one into exile, which is a bold canonical breach. Almost for three decades, TPLF had become the alpha-omega of the republic; the Orthodox Church from the Holy Synod up to the single diocese fell under the tight control of the cadres.

EOTC, under Abiy Ahmed's premiership, has not escaped from co-optation and repression. In his early days, the prime minister co-opted the church and contributed to the reconciliation of the exile synod with the home synod. The church and its followers praised and warmly welcomed the prime minister. Yet, in the later days, the Orthodox Church and its followers have been facing an uncountable series of damages. The killings of the faithful, the burning of the churches, and displacement are becoming daily news. The schism of the Synod, followed by the takeover of the churches by the illegal synod-so called "synod of Oromia and nations nationalities by the direct support of the Oromia special police force, shakes the church and the state at large. Therefore, the study finds that the Prosperity Party co-opted and repressed the church against Article 11 of the FDRE constitution.

Lastly, the researcher strongly argues that the version of secularism practiced in Ethiopia is not about the separation of state and religion. Instead,

secularism is becoming the de facto religion of the system. The regimes, through co-option and repression, forced the Orthodox Church to upgrade its canon, holy day festivities, and other church ceremonies. This is intended to renew the age-old religion in a way that fits with the political philosophy of synergy (so-called Medemer) and the new technologies, which is in total contradiction to the foundation of the Orthodox Church discourse.

Conflict of Interest: The author reported no conflict of interest.

Data Availability: All data are included in the content of the paper.

Funding Statement: The author did not obtain any funding for this research.

References:

1. Ahmed, A. (2021). *The Journey of Synergy*. Addis Ababa
2. Ancel, S., and Ficquet, E. (2015). *The Ethiopian Orthodox Tewahedo Church (EOTC) and the Challenges of Modernity*. Oxford University Press, London, 2015.
3. Ancel, S. (2011). Centralization and Political Changes: the Ethiopian Orthodox Church and the Ecclesiastical and Political Challenges in Contemporary Times, *Rassegna di Studi Etiopici*, 3 (Nuova Serie), pp. 1–26.
4. Berhe, A. (2008). A Political History of the Tigray People's Liberation Front (1975-1991): Revolt, Ideology, and Mobilisation in Ethiopia. PhD Dissertation (Amsterdam: Vrije Universiteit)
5. Dejen, M. (2018). Religion and the secular state order: the Ethiopian experience. *Religion, Law, and security in Africa*. DOI: <https://10.18820/9781928314431/14>
6. Doulos, M. (1986). 'Christians in Marxist Ethiopia', *Religion in Communist Lands* 14(2), 134–147. <https://doi.org/10.1080/09637498608431248>
7. Ebabey, T. (2020). Anti-Orthodox Christian Attitudes in Ethiopia: An Assessment of Historical and Contemporary Persecutions of Christians. *International Journal of Orthodox Theology*, Volume 11, (4). <https://urn:nbn:de:0276-2020-4020>
8. Engedayehu, W. (2013). "The Ethiopian Orthodox Tewahedo Church in the Diaspora: Expansion in the Midst of Division," *African Social Science Review*: Vol. 6: Iss. 1, Article 8
9. Fox, J. (2006). World Separation of Religion and State into the 21st Century. *Comparative Political Studies*, Volume 39 (5), <http://10.1177/0010414005276310>

10. Girma, M. (2018). 'Religion, poliics, and the dilemma of modernising Ethiopia', *HTS Teologies and Theological Studies* 74(1), 74(1) <https://doi.org/10.4102/hts.v74i1.4878>
11. Jalata, A. (2004). Fighting against the Injustice of the State; Begna, Significance of the Rights of People to Self-Determination, pp. 66
12. Jörg, H., (2009). "Writing Religious History. The Historiography of Ethiopian Pentecostalism." Dr. theol. thesis., University of Heidelberg.
13. Jörg, H., and Feyissa, D. (2022). "The Strains of 'Pente' Politics: Evangelicals and the Post-Orthodox State in Ethiopia." In Routledge Handbook on the Horn of Africa, edited by Nicholas Bach, 481–94. London: Routledge.
14. Jörg, H. and Østebø, T. (2011). EPRDF's Revolutionary Democracy and Religious Plurality: Islam and Christianity in Post-Derg Ethiopia. *Journal of Eastern African Studies* 5 (4): 755–72.
15. Larebo, H. (1986). "The Orthodox Church and the State in the Ethiopian Revolution, 1974–1984", *Religion in Communist Lands*, 14 (2), pp. 148–59.
16. Larebo, H. (1987). The Ethiopian Orthodox Church and Politics in the Twentieth Century: Part I. *Northeast African Studies*, 1987, Vol. 9, No. 3, pp. 1-17.
17. Mansfield, H. (1985). *The Prince: Niccolo Machiavelli* (2nd ed). THE UNIVERSITY OF CHICAGO PRESS Chicago and London
18. Molla, S. (2021). Ideological Violence Towards the Ethiopian Orthodox Tewahido Church in the Post-1960s. *Politics and Religion*, Vol. XV (II). <https://doi.org/10.54561/prj1502377a>
19. Østebø, T. (2023). Religious Dynamics and Conflicts in Contemporary Ethiopia: Expansion, Protection, and Reclaiming Space. *African Studies Review*, pp. 1–24
20. Roberts, K. (2004). *Religion in sociological perspective*, 4th ed., Canada: Thomson Wadsworth.
21. Serawit, B. (2018). Religion and Politics in Post-1991 Ethiopia: Making Sense of Bryan S. Turner's 'Managing Religions', *Religion, State, and Society*, Vol. 46, No. 1 DOI: <https://10.1080/09637494.2017.1348016>
22. Swatos, W., and Christiano, K. (1999). Secularisation Theory: The Course of a Concept. *Sociology of Religion*, Vol. 60, No. 3, pp. 209–228
23. Turner, B. (2007). "The Enclave Society: Towards the Sociology of Immobility." *European Journal of Social Theory*, Volume 10 (2): 287–303 <https://doi.org/10.1177/1368431007077807>

Emplois des Femmes dans les Provinces de Bujumbura et Gitega au Burundi : Quels Impacts sur les Conditions de vie des Ménages ?

Jean Bosco Yamuremye

Laurent-Charles Boyomo Assala

Institut de Formation et de Recherche Démographiques (IFORD)

Université de Yaoundé II au Cameroun

[Doi:10.19044/esj.2024.v20n11p53](https://doi.org/10.19044/esj.2024.v20n11p53)

Submitted: 10 March 2024

Accepted: 11 April 2024

Published: 30 April 2024

Copyright 2024 Author(s)

Under Creative Commons CC-BY 4.0

OPEN ACCESS

Cite As:

Yamuremye J.B. & Boyomo Assala L.C. (2024). *Emplois des Femmes dans les Provinces de Bujumbura et Gitega au Burundi : Quels Impacts sur les Conditions de vie des Ménages?* European Scientific Journal, ESJ, 20 (11), 53. <https://doi.org/10.19044/esj.2024.v20n11p53>

Résumé

Au Burundi comme ailleurs, la femme est vouée à plusieurs occupations dont la participation à l'activité économique. Cette activité est exercée tantôt chez elle au foyer, ce qui est généralement le cas lorsque les enfants sont en bas âge, tantôt en dehors du foyer. L'importance de l'activité économique de la femme peut être analysée à travers la contribution qu'elle apporte au ménage avec pour objectif l'amélioration des conditions de vie du ménage. Cependant, rares sont les travaux qui ont abordé la problématique de l'activité de la femme sous cet aspect au Burundi, d'où la nécessité d'analyser l'influence des facteurs associés à l'emploi de la femme sur les conditions de vie de son ménage. L'objectif de cet article est d'étudier la façon dont les conditions de vie du ménage sont influencées par les caractéristiques liées à l'emploi de la femme dans les provinces de Bujumbura et Gitega au Burundi. A partir des données de l'Enquête intégrée sur les conditions de vie de ménage, (EICVMB -2019/2020), le modèle logit a été utilisé pour mesurer l'effet des facteurs associés à l'emploi de la femme sur les conditions de vie de son ménage. Le secteur d'activité, le temps consacré à l'emploi, le revenu mensuel et le niveau d'instruction de la femme influencent significativement les conditions de vie de son ménage en province Bujumbura et Gitega au Burundi. Les résultats de l'estimation ont révélé que le fait pour une femme

d'avoir un revenu élevé ou très élevé accroît la probabilité de son ménage d'être dans des conditions de vie favorables. En outre, le niveau d'instruction de la femme, qui constitue une porte d'entrée sur le marché du travail et d'accès à un emploi de qualité, demeure un facteur important qui influence les conditions de vie de son ménage.

Mots-clés: Femme, emploi, impacts, conditions de vie, ménage

Women's Employment in Bujumbura and Gitega Provinces in Burundi: What Impacts on the Living Conditions of Households?

Jean Bosco Yamuremye

Laurent-Charles Boyomo Assala

Institut de Formation et de Recherche Démographiques (IFORD)
Université de Yaoundé II au Cameroun

Abstract

In Burundi as in other countries, women are dedicated to several occupations including participation in economic activity. This activity is sometimes carried out at home, which is generally when the children are young, and sometimes outside the home. The importance of women's economic activity can be analyzed through the contribution they make to the household with the aim of improving the living conditions of the household. However, few works have addressed the problem of women's activity from this aspect in Burundi, hence the need to analyze the influence of factors associated with women's employment on the living conditions of his household. The objective of this article is to study how household living conditions are influenced by characteristics linked to women's employment in Bujumbura and Gitega provinces in Burundi. Using data from the Integrated Survey on Household Living Conditions (EICVMB -2019/2020), the logit model was used to measure the effect of factors associated with women's employment on living conditions. The sector of activity, the time spent on employment, the monthly income and the level of education of the woman significantly influence the living conditions of her household in Bujumbura and Gitega provinces in Burundi. The estimation results showed that woman who has a high or very high income increases the probability of her household being in favorable living conditions. In addition, a woman's level of education, which constitutes a gateway to the labor market and access to quality employment, remains an important factor influencing the living

conditions of her household.

Keywords: Women, employment, impacts, living conditions, household

Introduction

Dans les ménages africains comme partout ailleurs, la femme est généralement impliquée dans plusieurs occupations dont la participation à une activité économique. Si, en général, l'exercice d'une activité procure un revenu à la personne qui l'exerce, il n'en reste pas moins que celle de la femme lui procure un revenu, quel que soit le type d'activité économique et le lieu de travail. La plupart des études existantes se sont focalisées sur l'étude des déterminants de l'insertion de la femme sur le marché de l'emploi et ont permis de montrer que les conditions de vie du ménage ont un impact sur la participation de celle-ci à l'activité économique (Marshall, K. (1999) ; Kouty, A. (2004), Pacaut, P., Le Bourdais, C. & Laplante, B. (2007) ; Gakou, A.D., & Kuepie, M. (2008); Bello F.H. & Dzoyem, S. G. (2015) ; Paul, C. (2020)). Cependant, elles n'ont pas exploré le lien entre les facteurs associés à l'activité économique de la femme et les conditions de vie du ménage.

Certes, les conditions de vie du ménage cachent plusieurs disparités dans la mesure où les ressources d'un ménage se limitent rarement à un seul « revenu ». Ainsi par exemple, les femmes qui ont un faible revenu mais vivant en couple avec un conjoint qui travaille, ou dans une famille qui dispose d'autres ressources de revenu, se trouvent dans des conditions appréciables. Les revenus des femmes sont certes faibles, mais cette faiblesse des revenus féminins est dissimulée par la diversité des revenus au niveau du « ménage ». Dans une étude réalisée en France, Lorraine, B. (2021) conclut que les emplois des femmes sont plus secondaires, moins rémunérés et rendent les ménages moins dépendants du salaire féminin. Le peu des travaux existant sur l'importance du revenu tiré de l'activité économique de la femme converge sur le fait que, quel que soit le type d'emploi exercé, la femme contribue au revenu du ménage (Roy, D. (2006) ; Olanbo, O. & Irene, V.S. (2015)). La santé (surtout celle des enfants), notamment la gestion de la sécurité sociale et de la mutuelle, sont toujours des tâches qui incombent à la femme, quelle que soit la position des deux conjoints, et la situation d'emploi de la femme (Roy, D. (2006)). Ainsi, les femmes devant satisfaire d'une manière ou d'une autre à cette donne, elles sont parfois contraintes d'accepter des emplois mal payés ou d'occuper des postes de statut inférieur. D'ailleurs, le fait pour la femme de participer au marché du travail et de toucher un revenu constitue une dimension essentielle pour son autonomisation (ONU-Femmes, 2020). Cette autonomisation ouvre la voie à des changements majeurs dans d'autres dimensions de sa vie telles que le bien-être, l'autonomisation sociale, la santé et l'éducation des enfants (Kabeer, N.

(2015) ; Kabeer, N. (2009)). Souvent cantonnées dans le secteur informel, qui reste leur principal lieu d'activité, elles contribuent pourtant de façon importante aux revenus du ménage.

Les études qui ont examiné les impacts des activités génératrices de revenus de la femme sur les conditions de vie du ménage à travers le monde et plus particulièrement dans les pays en développement, ont mis en évidence que les revenus de la femme participent à l'équilibre du ménage en favorisant l'éducation des enfants, la santé et l'alimentation (Kuepie, M.(2006).; Hofman, E., & Marius-Gnanou, K.(2007) ; Irving, M., & Kingdon, G. (2008). ; Seebens, H. (2009).; Porgnogo, CD. (2014)).

Ces auteurs ont montré que les femmes ont une plus grande tendance que les hommes à réaliser des dépenses liées à la santé, à l'éducation, à l'alimentation et à l'intérêt général dans le cadre du bien-être du ménage. En analysant les effets d'une contribution économique des femmes aux ressources du ménage sur la scolarisation des enfants au Burkina Faso, Wayack-Pambe, M. (2008) a trouvé qu'une forte contribution de la femme aux dépenses du ménage n'a pas d'influence sur la scolarisation des enfants, mais apparaît au contraire comme un obstacle pour la scolarisation des filles surtout du milieu urbain. Selon cette auteure, c'est dans les ménages où les femmes de ce milieu déclarent qu'elles prennent en charge la totalité ou quasi-totalité des dépenses du ménage que l'on observe une relation négative entre la fréquentation scolaire des filles et la prise en charge des dépenses du ménage par la mère.

Bien que les études empiriques sur la participation de la femme à l'activités économique aient été menées et ont permis de dégager les facteurs y associés, le lien entre les facteurs associés à l'emploi de la femme et les conditions de vie de son ménage demeure faiblement documenté. Cet article veut ainsi contribuer à une meilleure compréhension des caractéristiques liées à l'emploi de la femme et les conditions de vie de son ménage dans les provinces de Bujumbura et Gitega au Burundi.

Méthodologie

Les données utilisées dans cette étude proviennent de l'Enquête Intégrée sur les Conditions de Vie des Ménages au Burundi (EICMVB, 2019-2020), réalisée depuis mars 2020 jusqu'à mars 2021 sur l'ensemble du pays. L'EICMVB, 2019-2020 est basée sur un plan de sondage aléatoire et stratifié à deux degrés. La Zone de Dénombrement (ZD) telle que définie dans le Recensement Général de la Population et de l'Habitat de 2008 (RGPH, 2008) constitue l'unité primaire d'échantillonnage et le ménage l'unité secondaire. Les ménages de ces ZD échantillons sont listés lors du dénombrement effectué bien avant la collecte proprement dite pour constituer la base de tirage des ménages échantillons de l'EICMVB,2019-2020.

Dans la province de Bujumbura, 51 unités primaires (ZD) ont été tirées dont 3 en milieu urbain et 48 en milieu rural. Dans province de Gitega, 81 unités primaires ont été tirées dont 6 en milieu urbain et 75 en milieu rural. La population cible est constituée par les femmes âgées de 15 à 64 ans en emploi vivant dans les ménages ayant fait l'objet de l'enquête dans les provinces de Bujumbura et Gitega. La taille de l'échantillon est 346 femmes pour la province de Bujumbura et 734 femmes pour la province de Gitega.

La variable dépendante est « conditions de vie du ménage » a été construite à partir de sept variables que sont : fréquentation d'une école formelle, la pauvreté alimentaire, la couverture en assurance maladie, le statut d'occupation du logement, la possession d'un compte bancaire, appartenance à une tontine ou une association d'entraide mutuelle et le niveau de vie du ménage. Certaines de ces variables sont rapportées au ménages et d'autres concernent la femme elle-même. Les conditions de vie du ménage ont été qualifiées de « défavorables » si le ménage connaît au moins quatre (04) privations parmi les sept domaines.

Trois principales méthodes d'analyse ont été utilisées dans ce travail à savoir l'analyse descriptive bivariée, l'analyse factorielle des correspondances multiples et une estimation économétrique à l'aide du modèle Logit.

Description du modèle Logit

D'une façon globale, il s'agit de la détermination de la probabilité pour les ménages d'être en conditions de vie favorables ou non. La démarche consiste à expliquer la variable dichotomique y , désignant les conditions de vie, qui prend la valeur 1 si le ménage est en conditions de vie favorable et 0 sinon à partir d'un ensemble de p variables $(x_1, x_2, \dots, x_j, \dots, x_p)$.

Les femmes de l'échantillon se répartissent en deux groupes : celles qui sont dans les ménages où les conditions de vie sont favorables I_1 ($y = 1$) et celles qui vivent dans les ménages où les conditions de vie sont défavorables I_2 ($y = 0$) et nous déterminons l'influence de certaines variables caractéristiques de l'emploi de la femme sur la probabilité du ménage d'être en conditions de vie favorables ou non sans tenir compte des liaisons que ces variables entretiennent entre elles.

Théoriquement, on suppose que la probabilité pour une femme en emploi de résider dans un ménage du groupe I_1 ($y = 1$) dépend des valeurs des variables explicatives $(x_1, x_2, \dots, x_j, \dots, x_p)$ observées sur ce ménage. Une estimation de la probabilité qu'une femme appartienne à la classe 1, sachant qu'elle est caractérisée par le vecteur $x = (x_1, x_2, \dots, x_j, \dots, x_p)$ est donnée par la fonction logistique :

$$\Pi(x) = \frac{1}{1 + \exp\left(\sum_{j=1}^p \alpha_j x_j\right)}$$

Où α_j sont les coefficients inconnus du modèle avec j allant de 1 à p, p étant le nombre total de variables explicatives

x_j sont les composantes du vecteur x .

Résultats

Tableau 1. Résultats de l'analyse descriptive bivariée des facteurs associés aux emplois des femmes influençant les conditions de vie du ménage

variable et modalités	Province Bujumbura			Province Gitega		
	défavorable	favorable	signification asymptotiq (bilatérale)	défavorable	favorable	signification asymptotiq (bilatérale)
secteur institutionnel			0,639			0,001
Formel	50,0%	50,0%		24,00%	76,00%	
Informel	52,5%	47,5%		48,90%	51,10%	
lieu d'activité			0,001			0,001
A son propre domicile	45,9%	54,1%		44,00%	56,00%	
Sur l'exploitation agricole	49,6%	50,4%		51,40%	48,60%	
espace public	59,10%	40,90%		23,50%	76,50%	
domicile du client ou locaux de l'entreprise	68,20%	31,80%		46,70%	53,30%	
catégorie socioprofessionnelle			0,000			0,003
travailleur compte propre	55,50%	44,50%		47,60%	52,40%	
travailleur entreprise familiale	32,50%	67,50%		52,50%	47,50%	
ouvrier/employé non qualifié/aide-ménagère	61,30%	38,70%		33,90%	66,10%	
cadre supérieur ou assimilé	51,40%	48,60%		28,20%	71,80%	
Temps consacré à l'emploi principal			0,294			0,002
moins de 7 heures	51,30%	48,70%		52,40%	47,60%	
entre 7 et 9 heures	50,70%	49,30%		45,80%	54,20%	
10 heures et plus	59,20%	40,80%		34,80%	65,20%	
bénéficiaire des congés payés			0,01			0,024

oui	34,00%	66,00%		28,10%	71,90%	
non	53,40%	46,60%		48,40%	51,60%	
bénéficiaire des congés maladies			0,006			0,102
oui	41,80%	58,20%		39,60%	60,40%	
non	54,70%	45,30%		48,50%	51,50%	
cotisation dans une institution de sécurité sociale			0,000			0,019
oui	18,50%	81,50%		21,10%	78,90%	
non	53,50%	46,50%		48,20%	51,80%	
Revenu mensuel de la femme			0,000			0,000
très faible : au plus 30000	65,00%	35,00%		49,0%	51,0%	
faible:]31000; 60000]	43,10%	56,90%		55,7%	44,3%	
moyen:]61000; 150000]	54,50%	45,50%		46,7%	53,3%	
élevé:]151000; 300000]	55,00%	45,00%		43,0%	57,0%	
très élevé: plus de 300000		100,00%		10,2%	89,8%	
Ensemble	52,10%	47,90%		47,80%	52,20%	

Source : Auteur/exploitation des données de l'EICVMB-2019/2020

Analyse factorielle des correspondances multiples (AFCM) en province Bujumbura

Après apurement, nous nous retrouvons avec 7 variables actives et 20 modalités associées. Ainsi, nous disposons de 13 (20-7) axes factoriels ; d'où la nécessité de faire le choix des axes à interpréter car on ne saura pas interpréter les 13 facteurs. La méthode la plus utilisée est la méthode de coude. Pour qu'une modalité soit retenue pour expliquer la formation d'un axe, il faut que sa contribution moyenne (CTR) soit supérieure ou égale à 5 (100/20). Dans le cas où les contributions d'une modalité à la formation des axes retenus sont supérieures à la contribution moyenne, cette modalité décrira l'axe pour lequel la contribution est la plus grande. L'histogramme des valeurs propres montre que les deux premiers axes factoriels font 32,98% de pouvoir explicatifs d'informations, soit 19,43% pour le premier axe factoriel et 13,55% pour le second. La somme des valeurs propres des 20 facteurs vaut 1,85714 [(20 - 7) / 7]. Le tableau 2 contient les principaux résultats nécessaires à la caractérisation des axes.

Tableau 2. Résultats de l’AFCM en province Bujumbura

Variables-modalité	axe1		axe2	
	contribution positive	contribution négative	contribution positive	contribution négative
Lieu d’activité				
A son propre domicile			9,34	
Au domicile du client				17,49
Catégorie socioprofessionnelle				
Travailleur à son propre compte			5,62	
Ouvrier/employé non qualifié				23,61
Cadre supérieur ou assimilé	6,04			
Bénéficiaire des congés payés				
oui	23,47			
Bénéficiaire des congés de maladie				
oui	15,78			
Cotiser dans une institution de sécurité sociale				
oui	20,47			
Salaire/revenu mensuel de la femme				
Très faible				11,6
faible			6,42	

Source : Auteur/exploitation des données de l’EICVMB-2019/2020

Ainsi, les femmes en emploi vivant dans les ménages où les conditions de vie sont favorables présentent les caractéristiques suivantes : les femmes qui exercent leurs activités à domicile, les femmes qui travaillent pour leurs propres comptes, celles qui sont dans la catégorie des cadres supérieurs ou assimilés, les femmes qui bénéficient des congés payés ou de maladies dans l’exercice de leurs activités et les femmes qui ont un revenu mensuel faible.

Analyse factorielle des correspondances multiples (AFCM) en province Gitega

Après apurement, nous nous retrouvons avec 8 variables actives et 24 modalités associées. Ainsi, nous disposons de 16 (24-8) axes factoriels ; d’où la nécessité de faire le choix des axes à interpréter car on ne saura pas interpréter les 16 facteurs. Pour qu’une modalité soit retenue pour expliquer la formation d’un axe, il faut que sa contribution moyenne (CTR) soit supérieure ou égale à 4,2(100/24).

L’histogramme des valeurs propres montre que les deux premiers axes factoriels font 28,72% de pouvoir explicatifs d’informations, soit 18,35% pour le premier axe factoriel et 10,37% pour le second. La somme des valeurs propres des 24 facteurs vaut 2,0 [(24 – 8) /8]. Le tableau 3 contient les principaux résultats nécessaires à la caractérisation des axes.

Tableau 3. Résultats de l’AFCM en province Gitega

Variables-modalité	axe1		axe2	
	contribution positive	contribution négative	contribution positive	contribution négative
Secteur institutionnel				
formel		23,61		
Lieu d’activité				
A son propre domicile			14,05	
Sur l’exploitation agricole				8,58
Sur l’espace public		10,75		
Catégorie socioprofessionnelle				
Travailleur à son propre compte			12,16	
Ouvrier/employé non qualifié				6,75
Travailleur entreprise familiale				10,48
Cadre supérieur ou assimilé		21,33		
Bénéficiaire des congés payés				
oui		16,38		
Bénéficiaire des congés de maladie				
oui				10,90
Salaire/revenu mensuel de la femme				
Très faible				6,6
Elevé		4,43		
Très élevé			10,36	

Source : Auteur/exploitation des données de l’EICVMB-2019/2020

Ainsi, les femmes en emploi qui vivent dans les ménages où les conditions de vie sont favorables sont celles qui sont cadres supérieurs ou assimilés, qui ont un revenu mensuel élevé ou très élevé qui travaillent pour leurs propres comptes, qui sont dans le secteur formel et qui exercent leurs activités sur l’espace public ou à leurs domiciles.

Estimation de l’effet des facteurs associés à l’emploi de la femme sur les conditions de vie de son ménage

Dans chacune des deux provinces, l’estimation du modèle est significative au seuil de 1%, ce qui signifie qu’au moins une des variables explicatives (secteur d’activité, lieu de l’activité, catégorie socioprofessionnelle, le temps consacré à l’emploi, bénéficiaire de congés payés, bénéficiaire des congés de maladie, cotiser dans une institution de sécurité sociale, le salaire/revenu mensuel de la femme et le niveau d’instruction de la femme) influe significativement sur les conditions de vie de son ménage.

Tableau 4. Résultats du modèle logit en province Bujumbura

variable et modalités	Coef.	Std. Err.	z	P> z
secteur institutionnel (réf=formel)				ns
informel	-.0086444	.3489531	0.02	0.980
lieu d'activité (réf= A son propre domicile)				***
Sur l'exploitation agricole	-.2664704	.2203747	1.21	0.227
espace public	-1.06674	.378506	2.82	0.005
domicile du client ou locaux de l'entreprise	-1.620986	.4575242	3.54	0.000
Catégorie socioprofessionnelle (réf= travailleur compte propre)				***
travailleur entreprise familiale	.9957856	.3489345	2.85	0.004
ouvrier/employé non qualifié/aide-ménagère	.1729549	.5072633	0.34	0.733
cadre supérieur ou assimilé	1.172977	.2470852	4.75	0.000
Temps consacré à l'emploi principal (réf= moins de 7 heures)				ns
entre 7 et 9 heures	.1891902	.1922631	0.98	0.325
10 heures et plus	-.1860587	.3743703	0.50	0.619
bénéficiaire des congés payés (réf=oui)				ns
non	.2190436	.6460789	0.34	0.735
bénéficiaire des congés maladies (réf=oui)				**
non	-.6410879	.2779777	2.31	0.021
cotisation sécurité sociale (réf=oui)				***
non	-2.177612	.8208062	2.65	0.008
Salaire/revenu mensuel de la femme (réf=très faible)				***
faible	.6722271	.2683062	2.51	0.012
moyen	.5313455	.2665652	1.99	0.046
Elevé	1.281712	.4924209	2.60	0.009
Très élevé	(*)			
Niveau d'instruction de la femme (réf=sans niveau)				***
Primaire (F1, F2, F3)	.6689063	.2332203	2.87	0.004
2ndaire 1er cycle/F4	.6061575	.2798874	2.17	0.030
2ndaire 2e cycle & +	.9094878	.282183	3.22	0.001

Source : Auteur/ Exploitation des données de l'EICVMB 2019-2020

(*) : estimations non calculées suite aux effectifs faibles

Tableau 5. Résultats du modèle logit en province Gitega

variable et modalités	Coef.	Std. Err.	z	P> z
secteur institutionnel (réf=formel)				ns
informel	-.0765608	.5894425	-0.13	0.897
lieu d'activité (réf= A son propre domicile)				ns
Sur l'exploitation agricole	-.1947935	.1599547	-1.22	0.223
espace public	.0067069	.4469055	0.02	0.988
domicile du client ou locaux de l'entreprise	-.3047405	.2852641	-1.07	0.285
Catégorie socioprofessionnelle (réf= travailleur compte propre)				ns
travailleur entreprise familiale	-.0424636	.1534166	-0.28	0.782
ouvrier/employé non qualifié/aide-ménagère	.6063079	.3353354	1.81	0.071
cadre supérieur ou assimilé	-.1459111	.6263188	-0.23	0.816
Temps consacré à l'emploi principal (réf= moins de 7 heures)				**
entre 7 et 9 heures	.1883889	.1390594	1.35	0.176
10 heures et plus	.4881759	.2414935	2.02	0.043
bénéficiaire des congés payés (réf=oui)				ns
non	.176852	.7114803	0.25	0.804
bénéficiaire des congés maladies (réf=oui)				ns
non	-.1178845	.2927163	-0.40	0.687
cotisation sécurité sociale (réf=oui)				ns
non	-1.113915	1.076799	-1.03	0.301
variable et modalités	Coef.	Std. Err.	z	P> z
Salaire/revenu mensuel de la femme (réf=très faible)				***
faible	-.2703983	.1563211	-1.73	0.084
moyen	.191502	.1885508	1.02	0.310
Elevé	.044719	.2364376	0.19	0.850
Très élevé	1.691938	.4931612	3.43	0.001
Niveau d'instruction de la femme (réf=sans niveau)				***
Primaire (F1, F2, F3)	.640827	.1585976	4.04	0.000
2ndaire 1er cycle/F4	.4143911	.1907346	2.17	0.030
2ndaire 2e cycle & +	.8931585	.2300754	3.88	0.000

Source : Auteur/ Exploitation des données de l'EICVMB 2019-2020

Province de Bujumbura : le lieu de l'activité de la femme, sa catégorie socioprofessionnelle, le temps consacré à l'emploi, le fait de bénéficier des congés de maladie, l'affiliation dans une institution de sécurité sociale, le revenu mensuel de la femme et son niveau d'instruction ont un effet net significatif au seuil de 5% sur la probabilité que son ménage soit dans des conditions de vie favorables.

Par contre, en province Gitega, seulement le temps consacré à l'emploi, le revenu mensuel de la femme et son niveau d'instruction sont

significativement associés à la probabilité de la femme d'être dans un ménage où les conditions de vie sont favorables.

Discussion des résultats

Lieu d'activité de la femme

En référence aux femmes qui exercent leurs activités à domicile, le fait qu'une femme exerce son activité sur l'espace public diminue de 1,06 fois la probabilité que les conditions de vie de son ménage soient favorables et de 1,62 fois si elle exerce son activité au domicile du client ou dans les locaux de l'entreprise. Dans le cas de la province de Bujumbura, le fait même d'exercer son activité à son propre domicile serait liée à la décision de son conjoint de l'interdire de travailler à l'extérieur du foyer, craignant que le fait d'être en contact avec les hommes toute la journée conduirait sa femme à adopter d'autres comportements. Dans ces conditions, il est clair que le conjoint fasse le tout possible pour que le ménage ait des conditions de vie favorables, ce qui justifierait sa décision d'interdire sa femme d'aller travailler dehors. Ce résultat rejoint celui de Lorraine Bozouls (2021) qui a trouvé que les emplois des femmes sont plus secondaires, moins rémunérés et rendent les ménages moins dépendants du salaire féminin. Dans le cadre de notre étude, cela signifie que les conditions de vie favorables des ménages où les femmes exercent leurs activités à domiciles ne sont pas tributaires des revenus de ces femmes.

Catégorie socioprofessionnelle

Le fait pour une femme de travailler dans une entreprise familiale augmente de 99,5% la probabilité de son ménage d'être dans des conditions de vie favorables. Cette probabilité augmente de 1,17 fois si la femme est dans la catégorie des cadres ou assimilés. Dans un contexte de chômage grandissant et un faible niveau de salaire dans la fonction publique, il n'est pas surprenant que les entrepreneurs emploient les membres de leurs familles pour les tirer de la pauvreté. De surcroît, le revenu tiré de son activité dans cette entreprise familiale a un effet sur la probabilité que son ménage soit dans des conditions de vie favorables. Ce résultat interpelle les autorités publiques et leurs partenaires techniques et financiers pour appuyer davantage le développement du secteur privé car le pays n'a pas été en mesure de développer une économie moderne capable de fournir des possibilités d'emploi appropriées à leur population qui croît rapidement, plus particulièrement aux femmes qui sont les plus touchées par le chômage.

Temps consacré à l'emploi par jour

La base étant moins de 7 heures, plus la femme consacre le temps à son emploi, plus la probabilité que son ménage soit dans des conditions de

vie favorables augmente. Cela est dû au fait que les femmes qui travaillent moins de 7 heures par jour sont en situation de sous-emploi lié au temps et gagnent le moins en termes de revenu.

En province Gitega, le fait de consacrer 10 heures et plus à l'emploi augmente de 48,8% la probabilité que le ménage soit dans des conditions de vie favorables. Cela s'expliquerait par le fait que, dans cette province, il existe plusieurs types d'emplois où les femmes travaillent presque toute la journée et une partie de la nuit. Il s'agit par exemple des femmes boutiquières, les femmes travaillant dans les alimentations et pharmacies, les femmes exerçant plus d'une activité.

Congés de maladie

Le secteur informel est caractérisé souvent par l'absence de législation et dans certains cas, les employés n'ont pas droit au congé de maladie. Les résultats de notre analyse révèlent que, le fait pour une femme d'exercer un emploi où elle ne bénéficie pas de congé de maladie diminue de 64,1% la probabilité que son ménage soit dans des conditions de vie favorables. Malgré ces conditions de travail précaires et une rémunération très faible, ces femmes acceptent de tels emplois pour avoir un revenu, si minime soit-il et contribuer aux dépenses du ménage.

Cotisation dans une institution de sécurité sociale

Le passage d'un ménage où la femme cotise dans une institution de sécurité sociale à celui où la femme ne cotise pas, diminue, toutes choses étant égales par ailleurs, de 2,17 fois la probabilité qu'il soit dans des conditions de vie favorables. Cet effet met en évidence que les privations en conditions de vie se posent avec acuité dans les ménages des femmes en emplois mais qui ne cotisent pas dans une institution de sécurité sociale. En effet, la couverture médicale fait partie intégrante de la sécurité sociale et quand un des parents est affilié dans une institution de sécurité sociale, les autres membres du ménage (en particulier ses enfants) sont couverts en assurance maladie par cette institution. Roy (2006) souligne que la santé (surtout celle des enfants), et donc notamment la gestion de la sécurité sociale et de la mutuelle, est toujours une tâche qui incombe à la femme, quelle que soit la position des deux conjoints, et quelle que soit la situation d'emploi de la femme.

Niveau d'instruction de la femme

La probabilité qu'un ménage soit dans des conditions de vie favorables augmente lorsque le niveau d'instruction de la femme augmente. En province de Bujumbura, le passage du niveau d'instruction primaire au niveau d'instruction secondaire second cycle et plus, augmente de 34% la probabilité d'un ménage d'être dans des conditions de vie favorables. Toutes

choses égales par ailleurs, le fait pour une femme d'avoir franchi le premier cycle du secondaire augmente la probabilité de son ménage d'être dans des conditions de vie favorables de 60,6% et 66,8% si elle a le niveau primaire/fondamental. En province Gitega, le passage du niveau d'instruction primaire au niveau d'instruction secondaire second cycle et plus, augmente de 35,3% la probabilité d'un ménage d'être dans des conditions de vie favorables.

De même, le fait pour une femme d'avoir achevé le premier cycle du secondaire augmente la probabilité de son ménage d'être dans des conditions de vie favorables de 41,4% et 64,0% si elle a le niveau primaire/ fondamental. Cela justifie qu'en réalité le niveau d'instruction de la femme constitue la clé du développement. Cependant, force est de constater que, dans les pays en développement et en particulier au Burundi, des efforts restent encore à faire pour arriver aux résultats escomptés. Les données de l'enquête récente montrent que 4 femmes sur 10 (40,4 %) n'ont aucun niveau d'instruction ; 38,3% ont un niveau primaire (F1, F2, F3) ; 13,1% ont le niveau secondaire premier cycle ; 4,9% ont un niveau secondaire deuxième cycle et seulement 1,1% ont un niveau supérieur (EICVMB, 2019-2020).

Le revenu mensuel de la femme

L'augmentation du revenu de la femme entraîne une augmentation du niveau de vie du ménage. En Province de Bujumbura, la référence étant les femmes ayant un revenu très faible, le fait pour une femme d'avoir un revenu élevé augmente de 1,28 fois la probabilité de son ménage d'être dans des conditions de vie favorables. De même, le fait pour une femme d'avoir un revenu moyen augmente de 53% la probabilité que son ménage soit dans des conditions de vie favorables. En province Gitega, le fait pour une femme d'avoir un revenu très élevé augmente de 1,69 fois la probabilité de son ménage d'être dans des conditions de vie favorables. Plus le revenu tiré de l'activité de la femme augmente, plus elle contribue aux dépenses du ménage et meilleures sont les conditions de vie du ménage. Un résultat similaire est reporté par Odile ATTANASSO (2004) qui a trouvé que lorsque les femmes ont un emploi suffisamment rémunéré, elles sont plus disposées que les hommes à consacrer leurs gains au bien-être (éducation, nutrition) des enfants.

Conclusion

L'objectif de cet article est de contribuer à une meilleure compréhension des caractéristiques liées à l'emploi de la femme et les conditions de vie de son ménage dans les provinces de Bujumbura et Gitega au Burundi. Plus spécifiquement, il s'agit d'analyser la façon dont les conditions de vie du ménage sont influencées par les facteurs associés à l'emploi de la femme dans les deux provinces objets de l'étude. Au vu de ces

résultats, nous notons que le lieu de l'activité de la femme, sa catégorie socioprofessionnelle, le temps consacré à l'emploi, le fait de bénéficier des congés de maladie, l'affiliation dans une institution de sécurité sociale, le revenu mensuel de la femme et son niveau d'instruction influencent significativement les conditions de vie de son ménage en province Bujumbura. En province Gitega, le temps consacré à l'emploi, le revenu mensuel de la femme et son niveau d'instruction sont significativement associés à la probabilité de la femme d'être dans un ménage où les conditions de vie sont favorables. Ainsi, le niveau d'instruction de la femme, qui constitue une porte d'entrée sur le marché du travail et d'accès à un emploi de qualité, demeure un facteur important qui influence les conditions de vie de son ménage.

Le fait d'avoir un niveau d'instruction supérieur augmente les chances d'accéder à un emploi protégé. A cet effet, les politiques visant à promouvoir l'accroissement des niveaux d'instruction des femmes au-delà du fondamental pourraient donc constituer une des composantes d'une stratégie efficace de lutte contre la pauvreté des ménages.

Conflit d'intérêts : Les auteurs n'ont signalé aucun conflit d'intérêts.

Disponibilité des données : Toutes les données sont incluses dans le contenu de l'article.

Déclaration de financement : Les auteurs n'ont obtenu aucun financement pour cette recherche.

References:

1. Bello, FH., & Dzoyem, SG. (2015). Participation de la femme à l'activité économique au Cameroun, UAPS 2015
2. Bozouls, L. (2021). Travail domestique et production d'un style de vie: Les femmes au foyer de classes supérieures. *Travail, genre et sociétés*, 46, 97-114. <https://doi.org/10.3917/tgs.046.0097>
3. Gakou, AD., & Kuepie, M. (2008). Niveau et déterminants de l'insertion des femmes sur le marché du travail au Mali, *Statéco* no. 103.
4. Hofman, E., & Marius-Gnanou, K.(2007). Le crédit des femmes et l'avenir des hommes, *Dialogue* n°37.
5. Irving, M., & Kingdon, G. (2008). *Gender patterns in household health expenditure allocation: a study of South Africa*, University of London.
6. Kabeer, N. (2009). *Women's economic empowerment: Key issues and policy options*. Women's Economic Empowerment, Agence

- suédoise de coopération internationale au développement, <https://cdn.sida.se/publications/files/sida52479en-womens-economic-empowerment.pdf>
7. Kabeer, N. (2015). Gender Equality, Economic Growth, and Women's Agency: the "Endless Variety" and "Monotonous Similarity" of Patriarchal Constraints. *Feminist Economics*, vol. 22/1, pp. 295-321, <https://doi.org/10.1080/13545701.2015.1090009>.
 8. Kuepie, M.(2006). Revenu du chef de ménage et stratégies de survie des ménages pauvres : une comparaison Dakar/ Bamako. Etude de la population africaine Supplément A du vol. 19, DIAL-CIPRE/CEPS-INSTEAD.
 9. Kouty Eboumbou, A. (2004). Activité économique des femmes et fécondité au Cameroun, Mémoire de MPD, IFORD, Université de Yaoundé II, pages 23-41.
 10. Marie-Odile, A. (2004). Analyse des déterminants de la pauvreté monétaire des femmes chefs de ménage au Bénin. *Mondes en développement*, 2004/4 no 128, p.43-61.
 11. Marshall, K. (1999). L'emploi après la naissance d'un enfant. *L'Emploi et le Revenu en Perspective*, 11(3), 20-28
 12. ONU-Femmes (2020), L'autonomisation économique : quelques faits et chiffres, <https://www.unwomen.org/fr/what-we-do/economic-empowerment/facts-and-figures>
 13. Pacaut, P., Lebourdais, C. & Laplante, B. (2007). Dynamique et déterminants de la participation des femmes au marché du travail après la naissance d'un enfant au Canada. *Cahiers québécois de démographie*, 36(2), 249–279. <https://doi.org/10.7202/029625ar>
 14. Paul, C. (2020). Les déterminants de la participation des femmes au marché du travail au Bénin. Bamako, 18-20 février 2020
 15. Porgnogo, CD. (2014) : Impact de la participation des femmes dans l'activité de la pêche sur l'amélioration de la sécurité alimentaire et nutritionnelle des ménages dans la vallée du Sourou. Mémoire de Master, UNIVERSITE POLYTECHNIQUE DE BOBO-DIOULASSO, INSTITUT DU DEVELOPPEMENT RURAL, 54p.
 16. Roy, D. (2006). L'argent du « ménage », qui paie quoi ? *Travail, genre et sociétés*, 15, 101-119. <https://doi.org/10.3917/tgs.015.0101>
 17. Seebens, H. (2009). The contribution of female non-farm income to poverty reduction, University of Göttingen, Insitute for the Study of Labor (IZA).
 18. Wayack-Pambe, M. (2008). Une forte contribution de la femme aux ressources économiques du ménage améliore-t-elle la participation scolaire des enfants au Burkina Faso ? IRD.

Gothic Experiences in *Jane Eyre*, *Wuthering Heights*, and *The Tenant of Wildfell Hall*

Dr. Etienne Pathe Tine

English Language Teacher, Prytanée Militaire of Saint-Louis, Senegal

[Doi:10.19044/esj.2024.v20n11p69](https://doi.org/10.19044/esj.2024.v20n11p69)

Submitted: 23 January 2024

Accepted: 04 April 2024

Published: 30 April 2024

Copyright 2024 Author(s)

Under Creative Commons CC-BY 4.0

OPEN ACCESS

Cite As:

Tine E. P. (2024). *Gothic Experiences in Jane Eyre, Wuthering Heights, and The Tenant of Wildfell Hall*. *European Scientific Journal, ESJ*, 20 (11), 69.

<https://doi.org/10.19044/esj.2024.v20n11p69>

Abstract

This paper thoroughly analyses the theme of the gothic imagination in the works of Charlotte, Emily, and Anne Bronte, specifically in *Jane Eyre*, *Wuthering Heights*, and *The Tenant of Wildfell Hall*. The novels portray romantic and sublime scenes with elements of terror, horror, and the uncanny, which intensify the expression of the gothic feelings experienced by the characters. The study also explores women's suffering in the context of gothic thought. Various factors inherent to the gothic genre contribute to the 19th-century readers' fascination with the supernatural and thrilling emotions. This work explores gothic experiences depicted in novels using gothic tropes and critical approaches such as Marxism, feminism, or psychoanalysis. The use of the framing narrative technique remains a distinctive aspect of this study which worthily includes *The Tenant of Wildfell Hall*, a book that many critics have wrongly overlooked when interpreting the Bronte sisters' novels in the light of the gothic trend. The analysis considers the common gothic features that characterize the novels, rather than treating them separately. This reinforces and enhances the scope of the analysis of the Gothic vision of these Victorian novelists.

Keywords: Fear, sublime, love, terror, horror, the uncanny, madness, emotion, ghosts

Introduction

The keen interest in the realistic English novel has not abated since the early 18th century despite the influences of other genres that have invaded the 19th-century literary space. Indeed, that novel has undergone some changes. One noticeable effect came from the introduction of gothic elements, which seemed to make the novel divert from its prime purpose of providing a faithful description of reality. The gothic romance trend stemming from the larger romanticism genre gained attractiveness fuelled by people's awe-inspiring fascination with dark and mysterious themes (Cadillo, 2021). The success of Emily's *Wuthering Heights*, Charlotte's *Jane Eyre*, and Anne's *The Tenant of Wildfell Hall* seems to rest upon the emotions they evoke in readers, such as pity and fear. The stories of Heathcliff, Jane, and Helen provide ample opportunity to explore an inordinate literary dimension through a great number of scenes that are imbued with terror, horror, the sublime and eerie happenings. These works display the Victorian female novelists' capacity to *address themes indirectly through Gothic fiction which couldn't be spoken of in polite society*' (O'Reilly, 2023).

This study will identify and analyze some main characteristics of the Gothic novel and its influence on 19th-century literary works, with a particular focus on the Brontë sisters' novels. The analysis will then examine three of their novels to explore prominent issues such as aspects of love, the fears associated with terror, horror, and the uncanny, in their gothic forms and manifestations. The gender issue is also raised, displaying the emotional predicament of women in Victorian society. In addition to the use of the various gothic tropes of the narratives, some critical instruments are employed to probe into the characters' minds and attitudes. The psychoanalytic interpretation will help to explore the hidden dark faces of human nature. The feminist approach, combined with Marxist ideas, underscores the depth of female trauma as related in the stories.

1. Emergence of the gothic novel and its influence on the Bronte sisters' novels

The Gothic novel entered the literary scene during the second half of the 18th century. It appeared before the advent of romanticism but later, nearly developed simultaneously, despite the rivalries noted by Phelps who said that *'...the words "gothic" and "romantic" were in bad odour...'* (Phelps, 1927, p. 20). That genre which initially developed in England was later exported to other countries like France and the USA. The Gothic novel established itself in the literary scene through the publication of *The Castle of Otranto* in 1764, and *Vathek* in 1786 by Horace Walpole. Other novels such as Ann Radcliff's *The Mysteries of Udolpho* in 1790, Mathew Lewis's *The Monk*, or Mary Shelley's *Frankenstein* issued in 1818 followed, initiating a new stage in that

fiction by emphasizing ‘... *tragedies of the soul, revealing deep, human conflicts, the struggle between good and evil for ultimate mastery in human life*’ (Varma, 1966, p. 153). This form which aimed to explore the depths of human nature soon became fascinating to readers.

The previously neglected form has now gained a significant influence on the Victorian novel. The Gothic novel is characterized by '*dark and gloomy settings*' (Al-Malki, 2014, p. 13) made of ruined buildings, old monasteries or convents, medieval fortresses, cemeteries, unusual noises, large spaces, atmospheric elements, etc. They create a favorable environment for ghosts and spirits, as popular belief and the Gothic imagination suggest. The protagonists in the stories are often solitary wanderers, taken to meditation and dreaming, and preyed upon by fears. The unknown constantly appeals to them. The predominance of female writers, readers, or characters in the stories, is noteworthy. The characters are often represented as innocent victims, persecuted by men, in a hostile and aggressive environment.

The gothic offers an environment conducive to meditation, but essentially to distressing dreams, which fits in the English soul's taste. One may wonder how people can become so passionate about these apparently charmless, frightening stories when one thinks of the ruins, and the bloodshed, among others, which rather arouse feelings of sadness and worry. As paradoxically as it may seem, the bourgeois, aristocrats, and the ladies with refined taste make up the majority of the readership of this Gothic novel.

As a literary trend, it has not lasted long but has managed to produce its effects and has also demonstrated its importance to book enthusiasts. Similarly, it influenced many writers of the era, particularly the Victorian novelists, as it is exemplified by the Brontë sisters. Indeed, Charlotte, Emily, and Anne were early imbued with different thoughts and topics addressed in translated Germanic writings. The influence of Gothic elements from bildungsroman and other genres on the novels of these inquisitive young intellectuals is undeniable. Their solid background knowledge in literature appears plainly in their fiction works because of the various literary and philosophical fields they have visited. Their novels display common features with the gothic genre, particularly through the settings adorned by an environment that looks highly haunted and full of mystery, such as the lonely crossroad of Whitcross and the isolated '*red room*' (Brontë, Charlotte, 1999, p. 8) in *Jane Eyre*, or the cemetery in *The Professor* where William reunites with her beloved Frances still in mourning. It sounds awkward but it is the way the gothic goes, as Anna and Andrew explain: '*Gothic stimulates ambivalent kinds of pleasure as desire and dread work on us in tandem*' (Powell & Smith, 2006, p. 2). The Gothic atmosphere is also evoked through the images of ancient castles, manors, and moorlands found in *Wuthering Heights*, along with the calls of sinister nocturnal birds and the presence of

animals such as the barking dogs or the vicious horses in *Villette*, *The Tenant of Wildfell Hall*, *Jane Eyre*, and *The Professor*.

The appeal to pathos and sympathy predominantly comes from women struggling alone to earn a living or against terrors from malevolent men. The Bronte girls' novels demonstrate the claimed involvement and expertise of the writers in the feminist movement. The majority of critics examine their works in the light of cultural feminism and the doctrine of social spheres. The girls share their different perspectives on women which diverge '*... from the societal norm as projected by Queen Victoria, which was to be a faithful wife and productive child-bearer first and foremost*' (Nitschke, Lauren. (2021). The female Gothic approach scrutinises the behaviour of female characters and highlights their specific, often hidden, traumatic experiences. Lee A. Talley notes relevantly that *The Tenant of Wildfell Hall* is the only novel with '*no supernatural elements, no character who recounts extraordinary dreams or nightmares*' (p.129), but he contends it is still a gothic work due to its narrative structure - *the nested narrative* - which is inherited from the Gothic and aims to explore the unknown. The focus is on Helen, that veiled woman who is a newcomer to the community. Jacobs states that the structure of that novel is '*appropriated and modified from the familiar gothic frame-tale*' (p. 204).

The Bronte sisters resort to a variety of specialised terminology including gothic vocabulary words to describe the unknown and emotions, or hyperbolic adjectives to create a gothic atmosphere, as they appear in this sentence: '*... my mind like a rayless dungeon, with one shrinking fear fettered in its depths ...*' (Charlotte, *Jane Eyre*, p. 357). There are also onomatopoeic words like '*...the flutter and chirp of the sparrows, the gleeful twitter of the swallows*' (Anne, *The Tenant of Wildfell Hall*, p. 175). That terminology enhances the expression of gothic feelings related to love, horror, terror, the supernatural, etc. in Bronte's novels and particularly in *Jane Eyre*, *Wuthering Heights*, and *The Tenant of Wildfell Hall*.

2. Love and the Gothic in the three novels of the Brontë sisters

The love stories that take place in the narratives portray the major theme of Gothic romance or Gothic novels, formerly called Romances. They display the importance of love and its different dimensions in gothic fiction. To study *Jane Eyre*, *Wuthering Heights*, and *The Tenant of Wildfell Hall* in the light of the gothic trend, it seems necessary to achieve a thorough identification of the feelings which act so powerfully upon characters. Heathcliff, Jane, Gilbert, or Helen can help to describe those '*Acute emotions, many of them sexual or psychopathic*' (Frank, 1987, p. 4), which foster '*extreme behaviour*' among human characters in the Gothic novel. They may

even develop demonic and spectral personalities. This analysis focuses on both gothic villains and sincere lovers.

It is noteworthy that most of the characters are moved by that powerful emotion which leads them to a life-or-death commitment. Helen has lived in sorrow for years because of her tragic love with Arthur. Millicent has had a similar experience with her husband Hattersley. Both men are violent partners and display a gothic aspect through their excesses of emotions and passion. Such emotional excesses are noticeable with Gilbert who does not hesitate to assault Lawrence whom he suspects of being Helen's lover. He hits '*the other*' so violently that he thinks he's acted unnaturally. After reconsidering his act, he accuses the devil, '*some fiend at my elbow*' (Bronte, Anne, *The Tenant of Wildfell*, 2001, p. 91). In reality, Lawrence is regarded as a menace for his love with Helen. Consequently, his '*combination of offenses*' is '*too unpardonable*' (p. 91). Gilbert appears as a knight. His mission is to protect Helen and keep her secure in the Wildfell Hall castle. So, he attacks Mr Lawrence whom he regards as a supernatural danger to the lady he must save. According to the gothic code, he is the villain who needs identifying and fighting before he commits his destructive acts. The reader is aware that all these actions are not solely motivated by the desire to help her, but also to convince her of his love. As in the medieval romance, Arthur mainly sets out unreservedly to find her wife again.

Unfortunately, all the risks he takes are in vain, which readers can interpret as the due retribution for all the emotional damage he had caused to Helen. Anne Bronte keeps Helen safe until Arthur's death before marrying her to Gilbert. Some critics have attacked Helen's decision as lacking rationality because it deprives her of all the benefits of inheriting her husband's property. Such a decision must be analysed from an emotional perspective. It demonstrates to which extent love can drive individuals to make an '*extreme*' decision.

Likewise, in *The Tenant of Wildfell Hall*, Gilbert's love for that widow looks irrational, given all the challenges he faces in his community and his family. The reader may wonder why he chooses to barter his first love interest with Eliza Millward for a '*mad dream*' (p. 372), as he confesses it. The information that Helen is married to Arthur Huntington does not decrease Gilbert's passion for her. He can't admit that she still loves her husband who has indirectly forced her to flee due to his infidelity, frequent absences, lies, and violence. Helen takes refuge at Wildfell Hall. She disguises herself as a widow to keep suitors and men away from her. Anne lets readers discover the true story of the woman's life with all the horrors of her marriage through Gilbert's voice. So, Anne implements the framing narrative, a technique which is familiar to gothic romanticism for exploring the unknown. The trope helps to unravel the mystery hidden behind the widow's veil. Helen, '*the unknown*

fugitive' (p. 372), also schematises women's emotional ordeal. That frame narrative technique is also used by Emily in her novel.

In *Wuthering Heights*, love is the main source of the prevailing conflictual atmosphere. The narrative is essentially built upon Heathcliff's love story with Cathy. Their love is complex because it is regarded as impossible, from the social view of Hindley, Catherine's elder brother, and the Lintons. For some critics, it appears as an incestuous love since Catherine's father is Heathcliff's adoptive father. They have lived together since they were young, but that is not a very convincing obstacle for Cathy. She claims that no creature can separate them (Brontë E., 1992, p. 58) and '*...he's more myself than I am. Whatever our souls are made of, his and mine are the same...*' (p. 58). Heathcliff also professes his unfailing reciprocal love for Catherine. The lovers' conviction comforts the reader's illusion that they intend to live that fusional love through an inordinate channel, like Jane and Rochester in *Jane Eyre*. However, Heathcliff faces a strong opposition to his love for Cathy, which urges him to disappear. Later, he returns unexpectedly with a fortune and starts courting Isabella, the sister of his former rival. He ultimately convinces her to marry him despite Edgar's warnings. Weirong explains: The revenge he put into force was extremely devastating and rebellious. Isabella is pure, innocent, romantic, and totally helpless when she was maltreated. Being beautiful, sensitive, and naive, she was seduced, caged and tortured by Heathcliff. She finally escaped and raised her son by herself, died miserably and sacrificed for Heathcliff's revenge (Qiao 2019, p.1579). Edgar guesses that it's only a revengeful strategy after he was deprived of Cathy's hand. Isabella ignores Heathcliff's plans and allows him to reach his mischievous objective.

In the case of both couples, the reciprocity of love is ambiguous and the marriages end tragically. Isabella and Cathy are overwhelmed by the emotional pressure and die. Heathcliff's love turns into a gothic passion, ultimately ending in a tragic necrophilia. Throughout the story, he is haunted by the duality of his feelings towards Cathy, as an object of love and revenge, which drives him to commit the horrible act of profanation after the woman's death.

The relationships between the dwellers of Heights and Grange are undermined by tensions opposing Heathcliff to the other protagonists. They all hinge on love and are taken to extremes. Indeed, the split in Heathcliff's character represents the frustrated man's obsession with taking revenge on society which has turned him into a gothic monster.

Emily uses the framing narrative to make the curious visitor explore the two estates which can be seen as castles or old mansions. Through Nelly and Lockwood's views, readers discover the prevailing power of love and particularly how it is used to serve patriarchy to the detriment of women.

Through this trope, Emily probes men's attitudes to unveil their dissimulated intentions. She urges society to address women's fears.

In *Jane Eyre*, Charlotte exposes the pressure upon women. Jane is particularly moved by her emotional quest. She early experiences the hardships of life due to social class conflict and people make her believe that she can't marry anyone she loves. When she meets Rochester, it does not take her long to notice that the man is emotionally affected. Shortly after, he declares his love for her and his wish to marry her. Indeed, she discovers by herself that her master is married. The woman locked in the attic is Rochester's sick and violent wife, which makes it impossible for them to marry. The other insuperable obstacle is the social class difference. Still, Rochester seems convinced that only Jane can get him rid of her lunatic wife before she commits crimes. Charlotte uses love as a pretext to draw Jane near Rochester to assist the man in dire straits as soon as necessary. Her presence saves Rochester's life when Bertha sets fire to his bed, and she uses water to put out the fire. The religious language related to water like '*deluged the bed*', '*baptised the couch*' (p. 130), lets Charlotte suggest that Jane is endowed with spiritual or supernatural power through her intention to purify the man. '*God's aid*' (p. 130) blesses her efforts which are solely motivated by pure love. '*Love is real, spiritual, and cannot be determined by position, strength or land, etc. in Jane Eyre's interpretation*' (Husain 2020 p. 4181). Those attributes plainly express the power of love.

After fulfilling her first mission, she decides to leave the house to take a new job in another town. Still, readers can guess that the main reason for her decision is to avoid being responsible for the separation of the duly married couple. Despite the distance, she cannot stop thinking of Rochester, particularly the day her cousin St. John River overtly declares that he wants to marry her. She irrationally declines, preferring Rochester, her former employer whom she has not seen or even heard from for years, unless they communicate through telepathy or mysticism. For readers, that must be the case because of Jane's mad decision to reject the offer of a good match. It is similar to Gilber's choice. In the role of a knight, she decides to go to rescue him. She undertakes a perilous, surrealistic journey back to Rochester's house. In addition to all the pains, such as losing her money, spending the night under the stars, being hungry, etc., she also manages to resist the unbearable pressure of '*the torture of her thought*' (p. 286). At a certain point in her progress, when she experiences destitution, she even calls for death. However, she decides to keep on struggling to '*retain a valueless life ... Because I know, or believe, Mr Rochester is living*' (p. 291). She appears to be more concerned with '*Mr. Rochester and his doom*' than her own life; he prays ceaselessly to God '*Mr Rochester was safe: he was God's*' (p. 286). The words she uses sound romantic, but also premonitory, when she imagines meeting a man '*impotent as a bird with both wings broken*' (p. 286). Like Helen, she appears to

be blind to reality due to her irrational choice, as the intensity of her emotions has taken her to the extremes of Gothic dimensions.

She is right in her surmise because Rochester is still alive. However, according to the information she receives, his house is burnt down by Bertha, causing him to move out to his modest estate in the country. She fortunately manages to find him again. She feels happy, regardless of his distressed situation. Rochester is like the 'bird' with 'broken wings' as the accident has left him partially blind, but that ever rekindles her love. She accepts to marry him and gives him a child.

Charlotte, Anne, and Emily exalt true love by reuniting true lovers, but also denounce the extremes love can take people to. In the novels, female characters like Helen, Millicent, Cathy, Bertha, and Jane, happen to be victims of gothic destructive effects instigated by male characters who have been turned into monsters due to their emotional passions.

3. Terror, horror and the uncanny in the novels

The concepts are inherent to gothic literature in which writers aim basically to stir up emotions, fears, suspense, and mystery and expose characters and readers to tension. Some critics refer to them as 'terrorists' due to the scenes they depict. They make '... *the flesh creep and the nerves thrill*' (Moers, p. 91), but give satisfaction to the readers in their quest for extremes.

These feelings are different, though not contradictory, especially when it comes to distinguishing horror and terror. The former is a physical emotion deriving from external or sensational factors and the latter is a psychological emotion coming from factors within. The uncanny relates to figments of the mind which tend to transform '*the familiar into something strange, unknown and even sinister*' (Bacon (ed.), 2018, p.2). Most of the protagonists of the stories live in psychological unrest due to uncontrolled passions.

Some readers or critics may wonder why Emily has created Heathcliff who appears to embody terror and horror in the story. That is the impression that Lockwood, an unknown visitor of Wuthering Heights, gets on seeing Heathcliff's physical appearance and his rather unwelcoming attitude. Heathcliff is uncommunicative, which makes it difficult to obtain information about the estate and its occupants. Like Heathcliff, the servants also display a suspicious attitude towards Lockwood. The first signal of terror is given by the presence of snarling dogs positioned near him upon his arrival in the sitting room. At the end of the visit, Joseph looses the dogs on him, mistaking him for a thief when he takes a lantern from the house because there is a blizzard. The savage attack causes him a serious nosebleed (Brontë E., 1992 p. 12). The atmospheric conditions are bad and even ominous as if the cosmic forces have come into play for the achievement of the predicament. As he must spend the night, Heathcliff asks Zillah to give him a room. Lockwood and the reader are terrified and horrified at the devilish plot epitomised by the attribution of the haunted room to the guest. Consequently, he has a sleepless night, with terrible nightmares and the vision of Catherine's ghost.

Lockwood discovers the ghosts' world and goes further, integrating and participating in the gothic setting when he states "*Terror made me cruel*", because he seized the dead Cathy's wrist and pulled it '*on to the broken pane, and rubbed it to and fro till the blood ran down and soaked the bedclothes*' (Brontë E., p. 17). By shedding blood, the narrator contributes to increasing the gothic fear among readers. Similarly, Gilbert Markham, who is just supposed to report Helen's journals, makes Mr Lawrence's head bleed. Emily and Anne seem to alter the narrator's role when the characters' attitude is analysed on the basis of the principles of the framing narrative technique they use.

The frame narrative technique has reinforced the idea of mystery prevailing in *Wuthering Heights* and *The Tenant of Wildfell Hall*. Traditionally, the frame narrator is supposed to relate the barbarity or horror in the story in a declarative way, but Jacobs notes a slightly different type in Brontë's novels. He underpins that the reader is not only '*shocked*' (p. 206) by the reported '*gothic evils*' of the story, but he also happens to face a situation where the narrators, namely Anne Brontë's Markham and Emily Brontë's Lockwood, '*are shown to be in part the cause of the shocking reality they encounter*' (p. 206). The novelists enhance the expression of terror by multiplying the sources of the fear which affects both the victim protagonists and the readers of the stories.

The frame narrative, also called '*the story within a story*', is used '*to explore something deep, dark and secret at the heart of the narrative*' (Southward, 2015, p. 2). The trope reinforces the impression that *Heights* and Helen's life are mysteries to be explored. Unravelling the unknown goes with dreadful, gothic perils, as Lockwood experiences it. Indeed, he spends the night in a room that epitomises the historical memory of *Heights*, with its visible realities represented by the old books and the mysterious face he discovers in his dreams. The room reminds readers of Jane's experience in '*the red room*' (chapter 2) in *Jane Eyre*. She was terrified at the idea that she had to stay in the room where her uncle died, with the deathbed and all the objects which were still in their places. They '*appear to be animate, sentient, alive*' (p.2), as Bacon says. The little girl is frightened by the idea that his uncle's ghost may come and visit her at night. She has the impression of seeing ghosts through the looking-glass:

Returning, I had to cross before the looking-glass; my fascinated glance involuntarily explored the depth it revealed. All looked colder and darker in that visionary hollow than in reality: and the strange little figure there gazing at me, with a white face and arms speaking the gloom, and glittering eyes of fear moving where all else was still, had the effect of a real spirit: I thought it like one of the tiny phantoms, half fairy, half imp, Bessie's evening stories represented as coming out of lone, ferny dells in moors, and appearing before the eyes of belated travellers. (Brontë C., 1999, p. 9)

It is rooted in popular belief that ghosts of the dead and spirits wander in the country. Indeed, popular beliefs have strongly influenced this novel: '*It is easy to recognise a gothic novel, for it is characterised by a specific collection of motifs and themes, many of which come through folklore, fairy tale, myth and nightmare*' (Howell, 2005, pp.52-3).

Everyone fears them, as Emily explains throughout chapter 244. Heathcliff used to be, and still is, a feared character in the story; they all believe that his ghost is still wandering. A '*little boy, he was crying terribly*' because '*They're Heathcliff, and a woman, yonder, under t' Nab, he blubbered, 'un' Aw darnut pass 'em*' (Brontë E., p. 244). The boy reports to Nelly that he has met Heathcliff on his way on the moors with a woman who was probably Cathy. He would not let him pass. Like Jane, the little boy is out of his wits after his frightful experience which unfortunately is not grounded in rational facts. People's obsessive feelings of anxiety reassert their dreadful consideration of the past but also remain linked to their fear of death. Admittedly, ghosts are associated with the idea of duality. They inspire fright as they are supposed to belong to the world of the dead but keep on haunting the living. As Kandji explains, fantasy is born from the moment man becomes aware of the fact that he is mortal, yet refuses to accept death as his lot in life (Kandji, 1997, p. 18).

As a young girl, Jane is particularly traumatised by the idea of death through her uncle's death, the trial of the '*the red room*' (8), and her proximity to Helen on her deathbed. Jane's fears at the time of sleeping under the stars in open fields are motivated, even though she does not speak plainly when she alludes to the birds' cries during the night. At Whitcross crossroad, located in the dead middle of the moorlands, she faces the unknown. She does not know about the right direction to take and remains particularly exposed to the insecurity of this lonely place. Like any crossroads, according to popular beliefs, this place can be haunted.

The intersection of roads and pathways are dark, dangerous, uncanny places, offering two or more options at once. According to ancient superstitions, crossroads are unhallowed grounds, haunted by vampires, demons, witches, and trolls or '*Malevolent spirits who like to lead travellers astray*' (George, 2018). Sam also explains that a crossroad used to be a burial place for murdered people, or those who died by suicide, etc. There is Jane solely left to nature, but to fantasy as well. She believes herself to be exposed to dark forces, monsters, and even his fellow men (sportsmen, poachers). The slightest noise caused by the wind participates to generate dread for her until she finds those '*apprehensions unfounded*' (285). Her fears result from similar factors or the idea of death. That night, she is like an outcast and decides to seek comfort in '*the universal mother, nature*' and be her '*guest*' (285). Indeed, Jane complains overtly about her supernatural fears which are partly due to her real awareness of popular beliefs. She is superstitious and sometimes happens to live in serious psychological unrest due to on simple dreams she often has in the story.

Indeed, the oneiric plunges her deeper into the supernatural awareness fuelled by her seven dreams in *Jane Eyre*. For example, she once dreamed of seeing before her ‘*a terrible red glare*’ which, in reality, was only ‘*the nursery fire*’ (Brontë C., 1999, p.13). Another dream is about an infant. It deeply worries or terrifies her when she wakes up:

I did not like this iteration of one idea—this strange recurrence of one image, and I grew nervous as bedtime approached and the hour of the vision drew near. It was from companionship with this baby-phantom I had been roused on that moonlight night when I heard the cry (Brontë C., 1999, p.13).

As indicated by the gothic terms that Charlotte uses to convey Jane’s trauma, the dream is actually terrifying. The girl feels all the more concerned as she remembers the day when Bessie was explaining to Abbot that dreaming of children is a sure sign of trouble, either to one’s self or one’s kin (193). As Jane feared, a few days later, Robert comes to announce to her that his uncle John died at his chambers in London (C. Brontë, *Jane Eyre* 194). The story corroborates the terror associated with popular beliefs and the premonitory nature of dreams.

Charlotte moves Jane from the horror and terror of her aunt’s house and Lowood to Thornfield. On her journey to that unknown town, the heroine comes across various difficulties. For example, Charlotte emphasizes Jane’s unsettled mind in the room she rents at the George Inn in Millcote. She highlights the suggestive features of the room including the faltering light, the prints on the wall, the portrait of George the Third, and a tableau representing ‘*the death of Wolfe*’ (Brontë C., p. 80). These elements evoke lingering gothic fears and past trauma experienced by Jane. That’s ‘*a very strange sensation to inexperienced youth to feel itself quite alone in the world*’ (p. 81), but she never accepts to relapse into past negative memories. She is convinced that:

‘... the charm of adventure sweetens that sensation; the glow of pride warms it; but then the throb of fear disturbs it; and fear with me became predominant when half an hour elapsed and still I was alone.’ (C. Brontë, p. 81).

Charlotte makes the reader discover the core of Jane’s state of mind on her way to Thornfield. She shares the girl’s concerns about what and who she will find there. Facing the unknown raises gothic feelings among protagonists and readers.

In *The Tenant of Wildfell Hall*, these ideas appear through the main character’s quest. Helen is the target of Gilbert and Arthur Huntingdon. They seem to fight against the psychological and emotional effects of isolation. They require Helen’s presence to restore their masculine identity, for example. Helen lives under the cover of a veiled widow. Under that mask, she must be willing to conceal a past tinged with mistakes and suffering which rather gives her the female image of the fallen angel. The terror Helen has experienced makes her feel

distrustful of men. To clear past fears and reconcile with her true personality, she needs to avoid male presence.

Terror, horror and the uncanny take different forms and manifestations in the novels. The characters' experiences of physical, moral, and psychological suffering reveal to what extent the gothic imagination can affect people's lives.

4. A female gothic reading of the novels.

The active presence of women in *Jane Eyre*, *Wuthering Heights*, and *The Tenant of Wildfell Hall* is evidence of their significant role in the development of gothic fiction. Critics often highlight this aspect through various female approaches. In this respect, a subgenre known as '*the female gothic*' was initiated by Ellen Moers and emerged in the late 18th century and continued to the 19th century. She defines it as follows:

What I mean by Female Gothic is easily defined: the work that women writers have done in the literary mode that, since the eighteenth century, we have called the Gothic. But what I mean or anyone else means-by "the Gothic" is not so easily stated except that it has to do with fear. (p.90)

It focuses on the experiences, fears, and societal constraints women face. It often explores themes related to the oppression of women, their confinement, and the supernatural.

In the late 18th century narratives, '*the central figure is a young woman who is simultaneously a persecuted victim and courageous heroine*' (Moers, p. 90), even though Mary Shelley demonstrates in *Frankenstein* that the Gothic narrative can do '*without even an important female victim*' (pp. 91-2). In their respective novels, the Brontë sisters predominantly portray brave female characters resisting containment and domination, as exemplified by Jane, Cathy, and Helen.

Young women live in constant fear and pressure. Cathy and Isabella in *Wuthering Heights* or Helen and Millicent, are persecuted by men who are solely motivated by their interest. The bone of contention with their oppressors is love which often leads to terrible scenes and the detriment of women. Cathy cannot engage in a physical confrontation like Jane or Bertha; she resorts to marrying Edgar. She is also subjected to unbearable pressure from society and Heathcliff. Emily links her persisting illness to that situation. Cathy becomes '*ill*', and '*delirious*' (Brontë E., p. 91), which makes Mrs Linton '*horrified*' (p. 92) when she observes the extent of her suffering. It seems that her attempt to alleviate her mental state has not been successful. Isabella succeeds in escaping far from her oppressor but by that time, she is deeply affected and ultimately dies.

In Anne's novel, Helen is also affected by that gothic love. fortunately, she benefits from the support of a young man who helps her dispel the fear of violence she used to be subjected to. She narrowly avoids philophobia. Her veil helps her to protect against unwanted suitors and male domination. In *Jane Eyre*, Bertha experiences emotional problems and reacts violently to achieve her liberation. Like Jane, she may be regarded as a monstrous challenge to

patriarchy because she represents an unconventional female archetype in their society. Her acts of rebellion result in a horrible fire and a violent, bloody attack. When Bertha's narrative is read in the light of the gothic, it seems to imply a correlation between love and illnesses like hysteria, consumption, or madness.

Hysteria is often associated with women and Ioana Boghian says, in *Illness in the Brontë Sisters' Novels*, that it derives from 'social and emotional isolation, injustice, and lack of love' (p. 642). Conversely, madness remains intricately linked to mystery and often portrays gothic imagery. It is compared to a monster, 'the most terrifying monster of all' (Peele, 2015) that lurks inside our minds. It is also regarded as "one of the most common themes in Gothic literature" (Peele, 2015). In *Jane Eyre*, the Attic and 'the red room' (8) resemble lunatic asylums or madhouses. Similarly, when Cathy and Isabella were seriously affected by stress disorder and illness, they stayed in bed. So, their rooms may remind readers of those specialised places. In *The Tenant of Wildfell Hall*, Annabella's relationship with love and sex highlights a lack of control over her passions. This may represent an illness, according to Boghian's view who notes that 'images of vampires and ghosts are interwoven with illness – with "consumption" and "intemperance" being two of Brontë's most symbolic illnesses.' (Boghian, *A Semiotic Approach to Illness in Emily's 'Wuthering Heights'*, 2015, p. 69). Her mad emotional feelings for Helen's husband portray her as an intemperate character. As a married woman, her conduct is unfortunately characterised by a negative emotional excess, as it is evidenced by her confessions. Her behaviour may be seen as subversive and even irrational, given the moral aspiration of the Victorian era. Romantic relationships are not just for entertainment purposes and are often intended to lead to marriage.

The gothic female sub-genre generally includes the presence of children to explore the themes of innocence, vulnerability, and the impact of societal expectations on women. There is no doubt that children are traditionally a source of joy, but they may also cause anxiety for mothers, as it is well exemplified in the three novels. Moers's analysis of Female Gothic texts seems also to underscore the fact that women are entrapped 'within the domestic and within the female body, most terrifyingly experienced in childbirth' (Smith & Wallace, 2004, p. 1). Their fear needs explaining by cultural feminists who think that women's 'free space' is invaded by men. This argument alludes to the opinion of Psychoanalytic critics which is based on Freudian sexuality and social relationships. For Dworkin, intercourse is a form of a 'gothic crime' of transgression even though women could be blamed as 'collaborators' in that offence. In heterosexual intercourse, the biological aspect of the female body predisposes women to 'male predation' (Meyers, 1977, p. 11).

Following childbirth, the education of children is a particular concern for many mothers, including Helen, who is particularly mindful of her child's future. She bears in mind that if she fails, little Arthur will be as monstrous as his father. This partly justifies some of her incomprehensible or even unreasonable decisions regarding her child, particularly when she once opposed little Arthur's request to let him go horse riding with Gilbert. Helen appears to fear the animal, possibly due to repressed desires or emotions related to sexuality and masculinity that she is trying to dispel. This powerful and instinctual animal is interpreted by psychoanalysts as a symbol of masculine sexual domination, based on Freudian theory.

Jane Eyre, *Wuthering Heights*, and *The Tenant of Wildfell Hall* portray prominently women's suffering from that captivating domination. Childcare burden is one of the female chores in the domestic sphere. The female gothic focuses on the influence of motherhood which makes women's condition more traumatising. The novels paint persecuted heroines like Helen who escapes from Arthur's tyranny with her child, and Isabella who is subjected to physical, moral, and psychological trauma. Fortunately, her son survived. Motherhood provides happiness in the sense that it exalts women, elevating them to the status of creators of human life (Moers, 1976, p. 93). But this angelic image seems to be toned down in gothic narratives where motherhood is also displayed as a source of misfortune. It shows some demonic side to women which emerges in certain circumstances. In Anne's other novel, *Agnes Grey*, Rosalie displays an irrational hatred for her baby girl. Indeed, it is an expression of the disgust she feels for her mad, intemperate husband, Sir Thomas Ashby (*chapter 22*). That could be interpreted as a manifestation of the syndrome of '*the trauma of the afterbirth*' (Moers, 1976, p. 93). Indeed, it emphasizes the contrast with the common cultural attitude towards motherhood which is joyful. Childbirth and childhood are associated with an underlying feeling of fear. In the female gothic view, women are victims of male exploitative acts through intercourse which '*makes all women into Gothic heroines, virgins awaiting, fearing, and, perhaps, desiring their defilement*' (Meyers, 1977, p. 11). Femininity is often seen as a symbol of male domination and female inferiority, according to Marxist feminist critics. Paradoxically, it seems that Rochester is defeated by his wife.

Rochester is willing to marry another wife but he faces Bertha's tacit but strong opposition. She ultimately punishes him severely. It seems that Bertha seeks revenge by planning to destroy his physical appearance so that he cannot love or be loved by another woman. She partly succeeds since Rochester has lost one eye after the fire that burnt down his house. However, this handicap does not remove his charm in Jane's eyes. Like Helen, both Bertha and Jane refuse to give up their love for Rochester and make irrational decisions. They are viewed as characters symbolising women in confinement

and living under the pressures of the domestic sphere. The difference lies in the fact that Helen cannot afford to respond violently to aggression like Jane and Bertha because she is concerned about her baby's physical, moral, and psychological integrity. Children need protection.

Often orphaned and alienated, children are subject to exploitation and corruption. Emily uses them as a means of manipulation and control through Heathcliff's marriage arrangements between his son Linton Heathcliff and Catherine's daughter Catherine Linton. He aims to gain control of the Grange to exact his revenge against Catherine, Hindley, and society.

The anxieties and fears associated with motherhood are substantiated in the three novels. A mother cannot predict her baby's future, as Mary Shelley symbolises it in her novel. Her creature is horrible and can be assimilated to Emily's Heathcliff. Both of them seem to escape from the control of their creator. The difference lies in the fact that in *Frankenstein*, the creator displays remorse, while Heathcliff, despite his morally questionable behaviour, remains a true portrayal of society and human nature.

Charlotte and her sisters deal with a widely debated issue concerning the condition of women in Victorian society, and in this respect, they emphasise the gothic sentiments that seem to haunt women through the fears related to female status, male domination, and motherhood. Their objective is not, as Miles says about Wollstonecraft, a '*wish to encourage women in this mistaken bid for power; she wants women to have power over themselves, not men*' (Miles, 1953, 81). Their heroines don't have any ambition to dominate their husbands but to get rid of the fears that spoil their lives.

Conclusion

The Gothic has provided significant inspiration for the 19th-century narratives. In *Jane Eyre*, *Wuthering Heights* and *The Tenant of Wildfell Hall*, Charlotte, Emily, and Anne take love to an irrational dimension, through the excesses it drives their characters to. Some of them engage in unreasonable relationships in the name of love, without any limits, to achieve their goals; they even resort to shedding blood, committing incest, or profanation. In their respective novels, the Bronte sisters emphasise fear through multiple terror and horror-inspiring scenes. The constant evocation of ghosts, spirits, phantoms, and other supernatural beings by Jane and the country folks (p. 244) in Emily's novel, or by Arthur Huntingdon, shows how popular beliefs predispose the English people to an interest in gothic stories. This work closely analyses women's conditions in the light of the gothic literary trend which has a substantial female readership. Some tools from literary criticism are used for an efficient reading of the novels as gothic works. The theory of female gothic has significantly contributed to reconsidering the sources of female suffering and underscores women's feelings associated with childbirth and motherhood,

as exemplified by Helen's tribulations. The gothic aspects are also enhanced by the frame narrative helping to explore the unknown and unravel mysterious happenings in *Wuthering Heights* and *The Tenant of Wildfell Hall*.

Indeed, the prospect of new emotional experiences which used to foster enthusiasm among the 19th-century readership continues to resonate with today's passion for horror or vampire films. It seems that the rising tendency to dramatize and adapt gothic novel stories for the screen is meant to compensate for the decline in people's interest in reading.

Conflict of Interest: The authors reported no conflict of interest.

Data Availability: All data are included in the content of the paper.

Funding Statement: The authors did not obtain any funding for this research.

References:

1. Al-Malki, N. (2014, Jul. 01). «*Lecture Notes Composite File*» *Slideshare*. Récupéré sur www.fr.slideshare.net/nooraalmalki1/literary-periods-movement
2. Bacon, (. S. (2018). *The Gothic*. Oxford: Peter Lang.
3. Boghian, I. (2015). A Semiotic Approach to Illness in Emily's "Wuthering Heights. *Limbaj; Balti Vol. 7, N° 1*, 63-76.
4. Boghian, I. (August 2013). Illness in the Brontë Sisters' Novels: Alcoholism, Madness, and Civilization. *Sino-US English Teaching Vol. 10, No. 8*, 638-649.
5. Bronte, A. (2001). *The Tenant of Wildfell Hall*. London: Wordsworth Classics. Brontë, C. (1999). *Jane Eyre*. London: Wordsworth Classics.
6. Brontë, E. (1992). *Wuthering Heights*. London: Wordsworth Editions.
7. Frank, F. S. (1987). *The First Gothics: A Critical Guide to the English Gothic Novel*. New York: Garland Pub.
8. George, S. (2018, July 02). *Vampire at the Crossroads. Open Graves Open Minds*. Récupéré sur Open Graves, Open Minds: <https://www.opengravesopenminds.com/ogom-research/vampire-at-the-crossroads/>
9. Howell, Coral Ann (2005). Margaret Atwood, Dedham Public Library. Dedham, Massachusetts.
10. Husain, H. J. 2020. *An Analytical Study Of Feminism In The Book Of Charlotte Bronte "Jane Eyre"*-- Palarch's Journal Of Archaeology Of Egypt/Egyptology 17(10), 4173-4183. ISSN 1567-214x.
11. Jacobs, N. M. (Fall 1986). Gender and Layered Narrative in *Wuthering Heights* and *The Tenant of Wildfell Hall*. *Journal of Narrative Technique* 16.3, 204-19.

12. Kandji, M. (1997). *Roman Anglais et Traditions Populaires*. Canada: Humanitas.
13. Meyers, J. (1977). The Sexual Politics of Gothic Fiction. *The Journal of Popular Culture*, vol. 11, no. 2, pp. 420-435.
14. Moers, E. (1976). *The Gothic Female*. New York: Doubleday & Company, Inc., Garden City.
15. Nitschke, Lauren. (2021, September 25). How Did Victorian England Create Gothic Literature?. Retrieved from <https://www.thecollector.com/gothic-literature-victorian-england/>
16. Noel O'Reilly (2023). Is Gothic Fiction Stuck in the Past? <https://noelaoreilly.com/tag/gothic-fiction/>.
17. Peele, J. (2015). *Gothic Tropes: Madness*. Récupéré sur The Gothic Library: <https://www.thegothiclibrary.com/gothic-tropes-madness/>
18. Phelps, W. L. (1927). *The Advance of the English Novel*. New York: Dodd, Mead and Company.
19. Powell, A., & Smith, A. (2006). *Teaching the Gothic*. London: Palgrave Macmillan.
20. Qiao, W. (2019). How is Wuthering Heights a Gothic Novel? *International Journal of English, Literature and Social Science (IJELS)* Vol-4, Issue-5, Sep – Oct 2019. <https://dx.doi.org/10.22161/ijels.45.48.1578-1583>.
21. Radillo, R. (2021). For Love of Genre: 'Gothic Romance'. Récupéré sur Daily Fandom: <https://thedailyfandom.org/for-love-of-genre-the-gothic-romance/>.
22. Roberts Miles (1953). *Gothic Writing 1750-1820: A Genealogy*. Manchester University Press. Palgrave USA.
23. Smith, A., & Wallace, D. (2004). The Female Gothic: Then and Now. *Gothic Studies* 6:1, 1-7.
24. Southward, D. (2015). D., Frame Narratives and The Gothic Subject. *The Dark Arts Journal*, 1 (1), pp. 45-53.
25. Talley, A. L. (2001). *Anne Brontë's Method of Social Protest in The Tenant of Wildfell Hall*. *New Approaches to the Literary Art of Anne Brontë*. 127-51. Aldershot: Ashgate.
26. Varma, D. P. (1966). *The Gothic Flame Being a History of the Gothic Novel in England: Its Origin, fluorescence, Disintegration, and Residuary Influences*. London: Arthur Barker Ltd.

Expansion des Agroforêts à Cacaoyers et Afforestation des Savanes sur le Confluent Mbam-Sanaga au Centre Cameroun

*Mopi Touoyem Fabrice
Youta Happi*

Université de Yaoundé 1, Département de Géographie, Cameroon

[Doi:10.19044/esj.2024.v20n11p86](https://doi.org/10.19044/esj.2024.v20n11p86)

Submitted: 25 January 2024

Accepted: 04 April 2024

Published: 30 April 2024

Copyright 2024 Author(s)

Under Creative Commons CC-BY 4.0

OPEN ACCESS

Cite As:

Fabrice M.T. & Happi Y. (2024). *Expansion des Agroforêts à Cacaoyers et Afforestation des Savanes sur le Confluent Mbam-Sanaga au Centre Cameroun*. European Scientific Journal, ESJ, 20 (11), 86. <https://doi.org/10.19044/esj.2024.v20n11p86>

Résumé

La progression de la forêt sur les savanes guinéennes est une réalité mise en évidence par des études en Afrique centrale en général et au Cameroun en particulier. Ce phénomène relève de divers processus naturels et anthropiques non encore suffisamment élucidés. L'objectif de ce travail est de montrer le rôle de l'expansion des agroforêts à cacaoyers dans la progression de la forêt sur la savane au centre-Cameroun. Pour y parvenir, l'étude s'est appuyée sur les analyses diachroniques des images de télédétection et les enquêtes sociologiques. Il en ressort que, l'expansion récente des agroforêts à cacaoyers en savane est liée principalement à la raréfaction des forêts (37,31%) et aux conditions agroécologiques auxquelles s'adaptent bien les nouvelles variétés hybrides vulgarisées auprès des cacaoculteurs (32,84%). La création de la cacaoyère en association avec des divers arbres d'ombrage plantés ou préservés crée à long terme des conditions propices à l'installation permanente et la progression de la forêt en savane. Ainsi 47,05% des populations attestent d'un recul de la savane au profit de la forêt contre 32,35% qui pensent le contraire. Les analyses diachroniques des images satellitaires montrent également qu'entre 1990 et 2000, l'on a enregistré une perte des superficies de forêts et d'agroforêts qui sont passées de 356 809,12 ha en 1990 à 102 365,23 en 2000 ; soit un bilan de -71,31% du fait de la déprise cacaoyère suite à la crise économique de la fin des années 80. Par contre, elles sont passées de 102365,23 ha en 2000 à 130124,25 ha en 2020 ; soit une augmentation de +27,12% en 20 ans, consécutivement au relèvement des

cours mondiaux du cacao et à la mise en œuvre des plans de relance de la filière cacao-café par les pouvoirs publics. Il serait donc important d'encourager davantage la création et la gestion intégrée de ces agroforêts dans une perspective du développement durable.

Mots-clés: Agroforêts, cacaoyers, afforestation, savane, centre-Cameroun

Expansion of Cocoa Agroforests and Afforestation of Savannahs on the Mbam-Sanaga Confluence in Central Cameroon

*Mopi Touoyem Fabrice
Youta Happi*

Université de Yaoundé 1, Département de Géographie, Cameroon

Abstract

The spread of forest over the Guinean savannahs has been highlighted by studies in Central Africa in general and Cameroon in particular. This phenomenon is the result of various natural and anthropogenic processes that have not yet been sufficiently elucidated. The aim of this study is to show the role played by the expansion of cocoa agroforests in the advance of forest over savannah in the study area. To achieve this, the study was based on diachronic analyses of remote sensing images and sociological surveys. It emerged that the recent expansion of cocoa agroforests in the savannah is mainly due to the increasing scarcity of forests (37.31%) and the agroecological conditions to which the new hybrid varieties popularised among cocoa farmers are well adapted (32.84%). The creation of cocoa plantations in association with various planted or preserved shade trees creates long-term conditions conducive to the permanent establishment and progression of forest into savannah. Thus, 47.05% of the population believe that the savannah is retreating in favour of the forest, compared with 32.35% who think the opposite. Diachronic analyses of satellite images also show that between 1990 and 2000, the area of forest and agroforest fell from 356,809.12 ha in 1990 to 102,365.23 ha in 2000, a decline of 71.31% as a result of the abandonment of cocoa production following the economic crisis at the end of the 1980s. On the other hand, the area under cocoa increased from 102365.23 ha in 2000 to 130124.25 ha in 2020, an increase of 27.12% in 20 years, following the rise in world cocoa prices and the implementation of government plans to revive the cocoa-coffee sector. It would therefore be important to further encourage the creation and integrated management of these agroforests with a view to

sustainable development.

Keywords: Agroforests, cocoa trees, afforestation, savannah, central Cameroon

Introduction

L'évolution des paysages et notamment des savanes guinéennes du Centre Cameroun est liée à l'influence du changement climatique de longue durée à l'échelle régionale et de l'activité anthropique sur le milieu à l'échelle locale (Carrière, 2003). En effet, plusieurs études sur les paléoclimats et la reconstitution des paléo-environnements en Afrique Centrale en général et au Centre Cameroun en particulier ; attestent que ces savanes se sont installées à la suite d'un assèchement du climat passé ayant entraîné une fragmentation des forêts en des milieux ouverts et qu'avec le retour du climat humide, la forêt est en phase de reconquête de la savane (Youta Happi, 1998 ; Schwartz et al., 2000 ; Youta Happi et al., 2000). D'autres travaux plus récents basés sur les analyses des données de télédétection décrivent également cette transgression naturelle plus rapide en cours de la forêt sur la savane en Afrique en lien également avec la suspension des défrichements et des feux de brousse et l'augmentation du CO₂ atmosphérique (Mitchard et Flintrop, 2013 ; Stevens et al., 2017 ; Sagang Takougoum, 2022 ; Sagang Takougoum et al., 2022).

Cette avancée de la forêt sur la savane est accélérée localement par l'Homme à travers les pratiques agroforestières associant les arbres aux cultures (Carrière, 1999 ; Ntsama, 2020) qui concourent à long terme à la transformation de ces savanes en agroforêts. Ces forêts anthropiques sont savamment construites par l'Homme à l'image des formations arborées incluses dans les paysages de l'Extrême-Nord Cameroun (Seignobos, 2000) concourent à l'afforestation des savanes guinéennes.

A cet égard, de nombreux travaux notamment ceux de Camara et al., (2012), Jagoret (2012 et 2013) ; Jagoret et Snoeck (2013) ; Mopi Touoyem, (2022) ; Manfo, 2022 ont mis en évidence le rôle des agroforêts à cacaoyers dans la transformation et l'afforestation des savanes au Centre Cameroun. En effet, la pression foncière et la diminution des terres forestières ont poussé les paysans à innover en expérimentant la culture du cacaoyer en savane malgré les conditions agroécologiques défavorables. Ceux-ci associent aux cacaoyers des arbres d'ombrage qui participent à la densification du couvert ligneux et à l'afforestation des savanes. Ce travail de recherche est structuré autour de la question de départ suivante : quel est le rôle des agroforêts à cacaoyers dans le processus d'afforestation des savanes périforestières au centre-Cameroun ? Pour cela, il repose sur l'hypothèse selon laquelle la création récente des agroforêts à cacaoyers dans les savanes périforestières contribue à l'avancée de la forêt sur la savane dans cette région. Le recours à la théorie de la

diffusion spatiale des innovations développée par Hägrestrand en s'appuyant sur la diffusion d'innovations techniques et sociétales dans les zones rurales, l'analyse des relations entre l'homme et le milieu fondée sur les approches holiste et ethnoécologique, ainsi que l'analyse diachronique des images satellitaires ont permis de mettre en évidence le rôle de l'Homme dans l'avancée de la forêt sur la savane à travers l'implantation des agroforêts en savane sur le confluent Mbam-Sanaga au Centre Cameroun.

Matériels et méthodes

Contexte géographique de l'étude

Le Confluent Mbam-Sanaga est situé géographiquement dans la Région du Centre au Cameroun, de part et d'autre des départements de la Lékié, du Mbam-et-Inoubou et du Mbam-et-Kim. C'est un territoire compris entre 4° et 5°N et 11° et 12° E (figure 1). Il est situé sur le plateau sud-camerounais dont l'altitude moyenne tourne autour de 650m (Sanctoir, 1992) et est dominé par un climat équatorial de type guinéen caractérisé par une pluviométrie bimodale et des températures dont les moyennes annuelles se situent respectivement autour de 1500 mm et de 25°C (Djoufack-Manetsa, 2011). La saison sèche dure environ 3 mois et s'étend de décembre à février, même s'il est également observé une régression de la pluviosité entre juillet et août et pouvant parfois s'étendre jusqu'à la première quinzaine de septembre qu'on qualifie parfois de « petite saison sèche ».

C'est une zone caractérisée par un paysage de mosaïque forêt-savane où l'on retrouve des intrusions forestières dans des savanes arbustives et herbeuses périforestières respectivement à *Bridelia ferruginea* et *Terminalia glaucescens* et à *Imperata cylindrica* et *Pennisetum purpureum* (Letouzey, 1985) dont certaines sont « construites » par l'Homme. La présence des conditions climatiques humides et des sols ferrallitiques profonds sont des conditions propices aux cultures arbustives telles que le cacaoyer et à l'implantation de la végétation de type forêt.

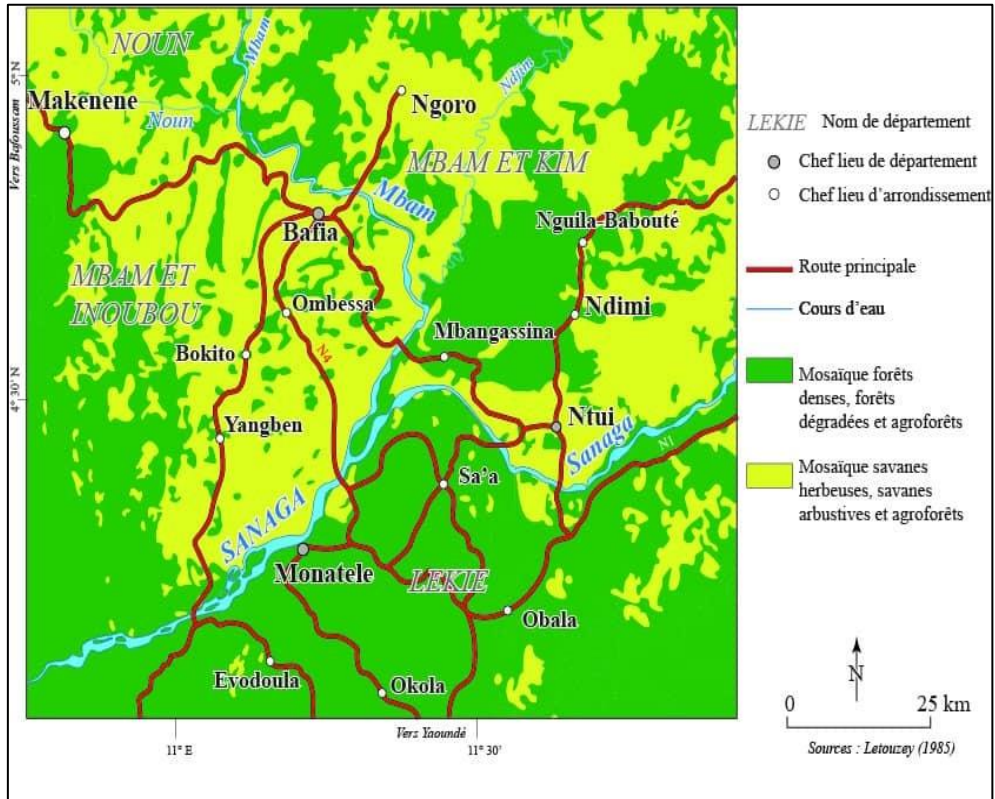


Figure 1. Localisation de la zone d'étude

Méthodologie

Pour mener à bien cette étude, les données quantitatives issues des enquêtes sociologiques ont été mobilisées ; ainsi que les données de télédétection.

Le traitement et les analyses diachroniques d'une série d'images satellitaires des capteurs Landsat TM, ETM+ et OLI pour les années 1990, 2000 et 2020 ont permis de mettre en évidence la dynamique de l'occupation du sol sur le confluent. A cet effet, trois classes d'occupation du sol ont été retenues à l'issue de la classification des images en tenant la réflectance et la confusion entre les pixels. Il s'agit notamment de : la classe des forêts et agroforêts, ensuite celle des savanes et forêts dégradées et enfin celle du bâti et des sols nus.

Les approches sociologiques et ethnoécologiques ont également été abordées à travers l'administration d'un questionnaire et des entretiens auprès d'un échantillon de 105 cultivateurs de cacao en savane. Celles-ci ont permis de collecter les informations auprès d'eux non seulement sur leurs motivations à investir les savanes pour aménager les agroforêts, mais également leurs

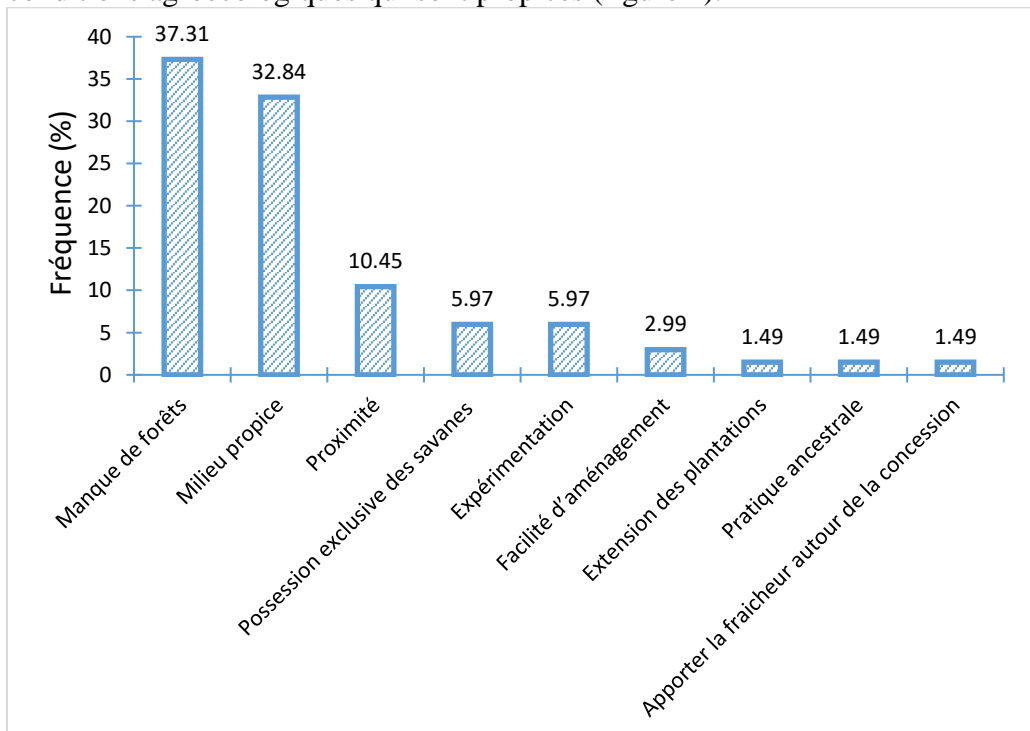
perceptions sur l'évolution du contact forêt-savane ainsi que les moteurs de cette dynamique. Les données ainsi collectées ont fait l'objet des traitements statistiques dans le tableur Excel afin de produire les graphiques de fréquence des différentes variables.

Résultats

Les motivations de l'expansion des agroforêts à cacaoyers en savane

Les arbres indigènes et les recrûs forestiers en savane sont généralement préservés lors du défrichage pour apporter de l'ombrage au cacaoyer. Ces pratiques sont à l'origine du développement de la cacaoculture en savane sur le Confluent Mbam-Sanaga.

Par ailleurs, la raréfaction de ces forêts dans les départements du Mbam et Inoubou et de la Lékié a poussé les producteurs de cacao à investir les savanes périforestières pour y expérimenter depuis quelques décennies la culture du cacaoyer. En effet, plus de la moitié des producteurs agricoles sur le confluent Mbam-Sanaga ; soit 52,94% pratiquent la culture du cacao en savane, contre 46,08% qui ne le pratiquent pas. Par ailleurs, seuls 0,98% ne s'intéressent pas à la cacaoculture. Parmi les raisons avancées par ceux qui le pratiquent en savane on peut noter principalement le manque de forêts et les conditions agroécologiques qui sont propices (figure 2).



Source : Données de terrain, août 2020

Figure 2. Les raisons de l'implantation des agroforêts à cacaoyers en savane

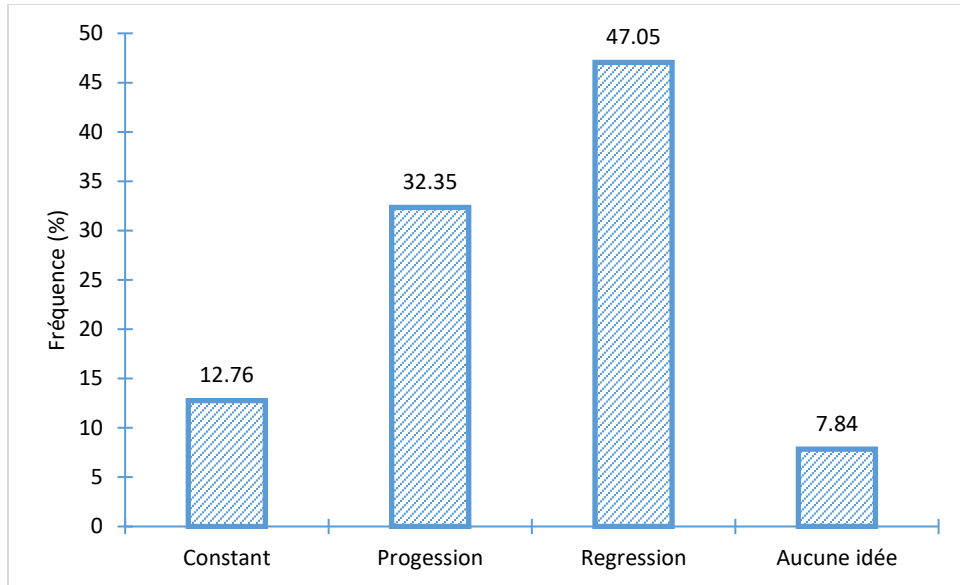
La majeure partie des producteurs (37,31%) pratiquent la cacaoculture en savane à cause de la raréfaction des forêts, 32,84% parce que le milieu savanicole est propice (bonne aération et faible vulnérabilité à la pourriture brune, croissance rapide et bonne productivité) et 10,45% du fait qu'ils sont près des savanes. En outre, 5,97% le pratiquent respectivement par simple expérimentation ou du fait qu'ils détiennent les terres en savane et n'ont pas de choix. Aussi, 2,99% affirment le faire à cause des facilités qu'offre l'aménagement des cacaoyères en savane et 1,99% affirment respectivement le faire dans le but d'étendre les plantations, de pérenniser les pratiques ancestrales ou d'apporter la fraîcheur autour de la concession.

Il apparaît donc évident que la forêt tout comme la savane occupent une place de choix dans le système de production cacaoyer sur le confluent Mbam- Sanaga. Ces deux formations végétales en fonction de leur disponibilité et de leur extension sont investies et travaillées par les agriculteurs pour produire de cacao au point où aujourd'hui, le paysage végétal de la région ne se présente plus que sous une forme bigarrée ou hétéroclite, composée des forêts déchiquetées ou domestiquées par l'activité humaine qui côtoient les savanes péri et intra-forestières.

On peut donc affirmer sans ambages que la mosaïque forêt-savane sur le confluent Mbsam-Sanaga offre aux agriculteurs une diversité de milieux agroécologiques, car le cacaoyer qui jadis était cultivé en forêt, est depuis quelques années expérimenté avec succès en savane par les cacaoculteurs de la région.

Perceptions locales de la dynamique du contact forêt-savane

Afin d'analyser la dynamique des savanes périforestières, les enquêtes sociologiques ont permis de recueillir les différents témoignages des populations vivant sur l'écotone forêt-savane. Pour cela, les différents témoignages des populations locales sont divergents. Certains se prononcent en faveur de la progression la savane au détriment de la forêt, tandis que d'autres pensent plutôt le contraire, en relevant un recul de la savane au profit de la forêt au cours du temps. Mais, il n'en demeure pas moins vrai que la majorité de la population se prononce en faveur du recul des savanes au fil du temps (figure 3).



Source : Données de terrain, août 2020

Figure 3. Perceptions de l'évolution des savanes

En effet donc, ces enquêtes sociologiques menées auprès des populations révèlent que, la majeure partie de la population ; soit 47,05% soutient le fait que les savanes régressent au profit de la forêt. Par contre, 32,35% de la population pense plutôt que la savane qui avance sur la forêt. Cependant, 12,76% d'individus estiment que l'évolution est constante ; c'est-à-dire la superficie n'évolue pas dans le temps et dans l'espace, tandis qu'une infime partie de la population (7,84%) n'ont aucune idée de son évolution

Tout compte fait, les observations effectuées sur le terrain et les entretiens avec des personnes ressources, notamment les patriarches et les personnes ayant vécu pendant longtemps dans certains villages permettent de d'attester bien évidemment du recul des savanes au profit de la forêt. En outre, les arguments avancés par les différentes populations pour soutenir leurs prises de position sont nombreux.

Les connaissances de la population sont partagées au sujet des facteurs qui sous-tendent la dynamique des savanes périforestières. Celles-ci diffèrent en fonction de chaque individu. Ainsi, ceux qui perçoivent le recul de la savane au profit de forêt, évoquent pour cela comme facteurs explicatifs : la création des cacaoyères, la plantation ou la préservation des arbres dans les champs, la dissémination des graines par le vent et les animaux et le rôle de *Chromolaena odorata*. Par contre, les populations qui témoignent de l'avancée de la savane évoquent comme arguments : les défrichements cultureux, les feux de brousse et la pression démographique (tableau 1).

Tableau 1. Les facteurs explicatifs de la dynamique des savanes

Recul des savanes	Proportion (%)	Maintien de la savane	Proportion (%)
Extension des agroforêts à base de cacaoyers	51,21%	Défrichements agricoles	78,95%
Plantation des arbres dans les champs	34,15%	Feux de brousse	15,79%
Dispersion des graines	12,20%	Pression démographique	5,26%
Présence de <i>Chromolaena odorata</i>	2,44%	//	//
Total	100%		100%

Source : Données de terrain, août 2020

L'on peut donc noter que, de tous ceux qui estiment que les savanes reculent au profit de la forêt, plus de la moitié ; soit 51,21% sont d'avis que c'est la création des cacaoyères qui explique cette dynamique. Par ailleurs, 34,15% soutiennent que l'avancée de la forêt est due à la plantation ou la préservation des arbres dans les champs que ce soit dans les cacaoyères ou les champs vivriers, tandis que 12,20% avancent comme raison la dispersion des semences qui favorise la repousse des recrûs forestiers en savane. Seulement 2,44% pensent que c'est la présence de *Chromolaena odorata* sur des sols riches qui favorise cette expansion de la forêt.

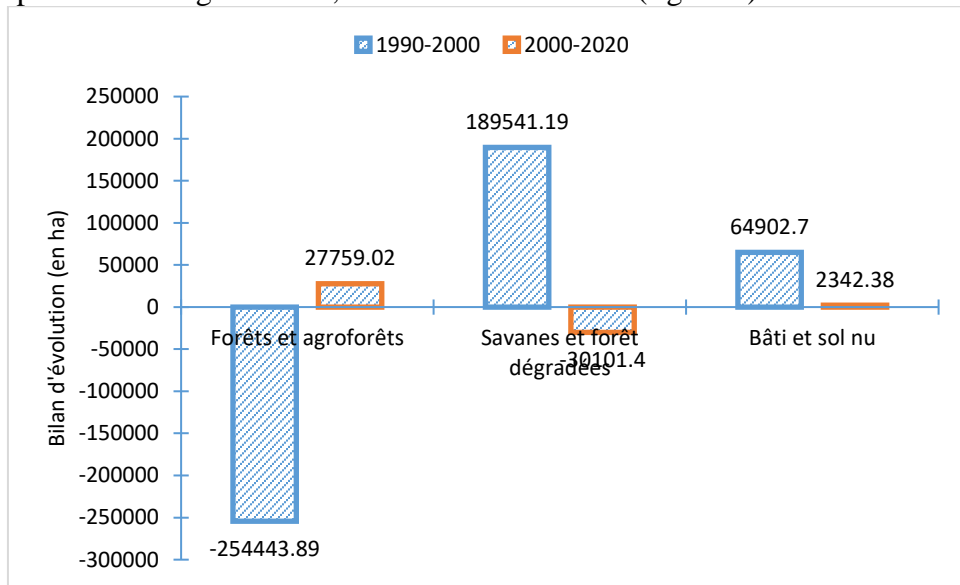
Dynamique de l'occupation du sol et processus de progression de la forêt sur la savane

Le bilan de la dynamique de l'occupation du sol établi à partir du traitement des images satellitaires montrent que les différentes classes d'occupation du sol ont évolué de manière asymétrique. Les forêts et agroforêts présentent un bilan négatif entre 1990 et 2000. Elles sont passées de 356 809,12 ha en 1990 à 102 365,23 en 2000 ; soit une perte de -254443,89 ha en valeur absolue ; ce qui équivaut à un déficit de -71,31% en valeur relative en 10 ans. Les savanes/forêts dégradées ont quant-à elles connu un bilan positif. Elles sont passées de 295694,96 ha en 1990 à 485236,15 ha en 2000 ; soit une augmentation de +189541,19 ha en valeur absolue représentant +64,1% en valeur relative. Pour le cas du bâti et des sols nus, ils présentent également un bilan positif. Ils sont passés de 107917,92 ha en 1990 à 172820,62 ha en 2000 ; soit un accroissement de + 64902,7 ha en valeur absolue, ce qui équivaut à une augmentation de +60,14% en valeur relative.

Entre 2000 et 2020, la tendance d'évolution des forêts et agroforêts, ainsi que des savanes/forêts dégradées s'est inversée. Les forêts et agroforêts ont enregistré un bilan positif au cours de la période. Elles sont passées de 102365,23 ha en 2000 à 130124,25 ha en 2020 ; soit une augmentation de

27759,02 ha en valeur absolue équivalent à +27,12% en valeur relative en 20 ans.

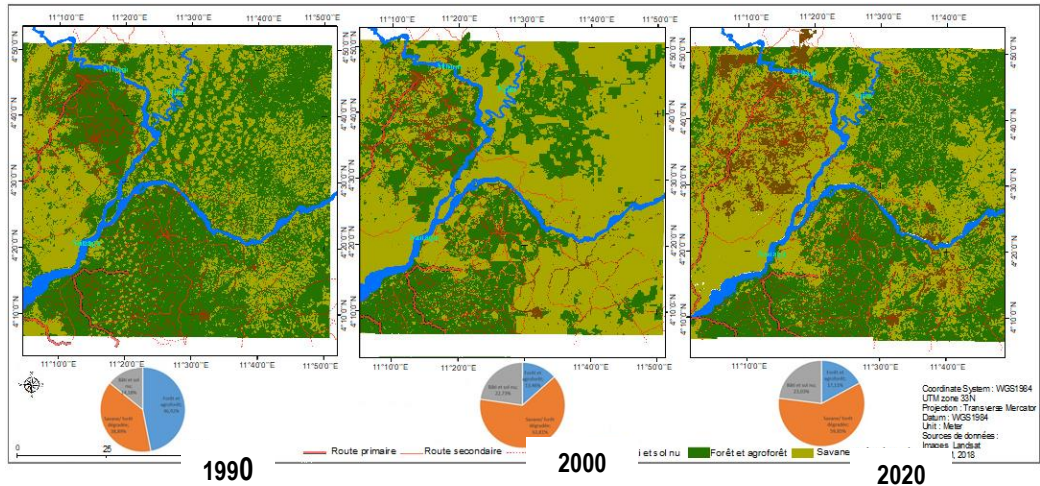
Les savanes et forêts dégradées quant-à elles ont connu un bilan plutôt négatif. Elles sont passées de 485236,15 ha en 2000 à 455134,75 ha en 2018, soit une perte de -30101,4 ha en valeur absolu représentant un recul de -6,20% en valeur relative. Le bâti et les sols nus ont tout de même connu un bilan négatif au cours de cette période. Ils sont passés de 172820,62 ha en 2000 à 175163 ha en 2020 ; soit un accroissement de +2342,38 ha en valeur absolue, représentant un gain de +1,36% en valeur relative (figure 4).



Source : Images Landsat

Figure 4. Bilan quantitatif de la dynamique de l'occupation du sol

L'expression cartographique de la dynamique spatiale des différents types d'occupation du sol sur le confluent Mbam-Sanaga se présente de la manière suivante (figure 5).



Source : Images Landsat

Figure 5. Bilan cartographique de la dynamique de l'occupation du sol

En effet, la diminution des forêts et agroforêts observée entre 1990 et 2000 est inéluctablement liée à la crise économique de la fin des années 1980 qui a entraîné la chute des prix du cacao, la mise sur pieds des programmes d'ajustement structurels et la dévaluation du Franc de la Coopération Financière en Afrique (FCFA). La conjoncture économique qui s'en est suivie a porté un sérieux coup sur la production cacaoyère et l'intégrité des forêts. Les planteurs ont abandonné ou remplacé leurs vergers par les cultures vivrières désormais plus rentables.

Par ailleurs, la baisse des salaires, la fermeture de certaines entreprises publiques, parapubliques et privés ont accentué la paupérisation des populations et l'augmentation du taux de chômage. La plupart des fonctionnaires et des ex-travailleurs se sont alors retournés vers le milieu rural pour se lancer dans l'agriculture vivrière afin d'améliorer leurs revenus. C'est donc ce qui pourrait expliquer cette perte des forêts et des agroforêts et l'augmentation des forêts dégradées entre 1990 et 2000.

Par contre, le gain de la superficie des forêts et agroforêts observé est certainement lié à la mise en œuvre depuis 2002 des différents plans de relance de la filière cacao et au regain d'intérêt des producteurs pour la cacaoculture depuis un certain nombre d'années. Ces plans de relance prévoyaient la régénération/rénovation et la densification des vergers existants d'une part, et d'autre part l'extension des exploitations par la création de nouveaux vergers.

La mise en œuvre des plans de relance de 2002 et 2014 et l'amélioration des prix d'achat du cacao ont catalysé l'accroissement des agroforêts et le recul des savanes. L'introduction du cacaoyer auquel sont associés du palmier à huile ainsi que des arbres fruitiers et d'ombrage dans les savanes explique aussi leur recul. En effet, l'intervention humaine dans

l'avancée de la forêt se fait soit à partir de la lisière en exploitant l'ombrage produit par les espèces de lisière, ou alors en plein cœur des savanes à l'intérieur desquelles des blocs d'agroforêts à cacaoyers sont créés et pourront entrer plus tard en coalescence en l'absence des feux.

Discussion

La dynamique des paysages de mosaïque forêt-savane est une question qui intéresse depuis longtemps les chercheurs et a fait l'objet de divers travaux aux courants scientifiques parfois controversés. En effet, l'Homme joue depuis longtemps un rôle prépondérant dans la dynamique des paysages sur l'écotone forêt-savane du centre Cameroun en favorisant l'afforestation des savanes par l'implantation des systèmes agroforestiers à base de cacaoyers. Ces observations sont à l'encontre des idées relayées par certains scientifiques qui ont longtemps avant les années 1990 développé des travaux mettant en exergue l'action de l'Homme dans la « savanisation » en zone de transition forêt-savane en Afrique centrale, à travers les défrichements agricoles répétés et les pratiques agricoles extensives sur brûlis (Aubreville, 1948 ; Koechlin, 1961 ; Jacques-Felix, 1968). Les résultats de ce travail de recherche sont en contradiction avec ce courant scientifique. Ces résultats montrent que face à la rareté des forêts et le développement de nouvelles variétés de cacao adaptées en savane, les populations parviennent à transformer ces savanes en agroforêts à cacaoyers, en associant aux cacaoyers des arbres d'ombrage et fruitiers qui participent à la progression de la forêt sur la savane. Ces résultats ainsi présentés concordent avec ceux présentés par d'autres auteurs qui depuis le début des années 1990, montrent dans leurs travaux basées sur la télédétection et la reconstitution des paléoécosystèmes, une transgression de la forêt sur la savane (Youta happi, 1998 ; Schwartz, et *al.*, 2000, Youta, Happi et *al.*, 2003 ; Mitchard et Flintrop, 2013 ; Sagang Takougoum et *al.*, 2022) ; avec des vitesses qui diffèrent l'échelle régionale en raison de la suspension des feux et des changements d'utilisation du sol (Stevens et *al.*, 2016). Cette avancée de la forêt sur la savane qui s'opère d'abord par les processus naturels à l'échelle régionale en l'absence des feux de brousses est ensuite accélérée localement par la création des agroforêts à cacaoyers et bien d'autres. Ces résultats vont également en droite ligne des travaux des autres auteurs qui montrent que le processus d'afforestation des savanes se voit accéléré sur le contact forêt-savane au Cameroun par l'Homme à travers la mise sur pieds des techniques agricoles associant les arbres introduits et/ou préservés dans les champs vivriers et l'extension récente des agroforêts à cacaoyers (Carrière, 1999, Mopi Touoyem, 2016, Ntsama, 2020, Mopi Touoyem, 2022). Ces résultats s'inscrivent également dans la logique des autres auteurs comme Villers (1995) qui a mis en exergue dans ses travaux le rôle des agroforêts à cacaoyers dans la transgression de la forêt sur la savane en montrant que dans le

département de la Léké au Centre-Cameroun, les fragments de forêts rencontrés aujourd'hui sont en réalité des forêts domestiquées qui à l'origine étaient des recrûs forestiers qui ont été défrichés pour installer des cacaoyères et les arbres d'ombrage que nécessitent ces cultures ont permis à la longue d'établir un équilibre ayant conduit à la persistance du couvert forestier. En outre, les résultats de ce travail de recherche indiquent que ce processus d'afforestation se produit de plusieurs manières notamment à partir de la lisière forestière en faisant bénéficier aux cacaoyers l'ombrage fourni par les espèces de lisière ou alors à l'intérieur de la savane en associant aux cacaoyers des arbres d'ombrage et fruitiers. Ces résultats vont dans le même sens que ceux de Dounias et *al.* (2001) qui montrent que dans ce processus d'afforestation des savanes, *Albizia* spp., est l'espèce héliophile accompagnant le front de transgression forestière le plus fréquemment rencontré et exploité notamment en raison de son feuillage léger qui satisfait pleinement à cette fonction de production de l'ombrage. Le processus d'afforestation à partir des agroforêts décrit dans ces travaux coïncide donc avec les études précédentes en zone de transition forêt-savane en Afrique centrale qui attestent effectivement d'une avancée de la forêt sur la savane.

Conclusion

Cette étude dont l'objectif est de montrer le rôle de l'expansion des agroforêts à cacaoyers dans la transgression de la forêt sur la savane sur le confluent Mbam-Sanaga au Centre Cameroun a permis d'entrée de jeu d'examiner les raisons qui amènent les populations locales à cultiver le cacaoyer, une plante sciaphile jadis cultivé sous ombrage forestier, en savane. Il se dégage que le manque de terres forestières (37,31%) et les conditions agroécologiques auxquelles s'adaptent bien les nouvelles variétés hybrides (32,84%) poussent les cacaoculteurs à étendre les cacaoyers en savane. Cette extension qui s'accompagne d'une diversité des arbres associés pour produire l'ombrage assurent à long terme la progression de la forêt. Ainsi, d'après les enquêtes sociologiques au sujet des perceptions locales de l'évolution des savanes, 47,05% des populations affirment que les savanes régressent au profit de la forêt du fait de l'extension des agroforêts à cacaoyers et des pratiques agrosylvicoles, contre 32,35% qui estiment que les savanes progressent du fait des défrichements agricoles et du passage répétitif des feux de brousse. Les analyses diachroniques de la dynamique de l'occupation du sol à partir des images de télédétection ont permis de relever qu'entre 1990 et 2000 l'on a enregistré une perte des superficies de forêts et d'agroforêts qui sont passées de 356 809,12 ha en 1990 à 102 365,23 en 2000 ; soit un bilan de -71,31%, consécutivement à la déprise cacaoyère qu'a engendré la crise économique de la fin des années 80. Par contre, au début des années 2000, le relèvement des cours mondiaux du cacao ayant remotivé les populations et la mise en œuvre

des plans de relance de la filière cacao-café à partir de 2002 ont eu un impact positif sur l'évolution des agroforêts à cacaoyers. Elles sont passées de 102365,23 ha en 2000 à 130124,25 ha en 2020 ; soit une augmentation de +27,12% en 20 ans. Cette reprise de la cacaoculture a donc favorisé une expansion des agroforêts à cacaoyers en savane et par conséquent une nette progression de la forêt.

Conflit d'intérêts : Les auteurs n'ont signalé aucun conflit d'intérêts.

Disponibilité des données : Toutes les données sont incluses dans le contenu de l'article.

Déclaration de financement : Les auteurs n'ont obtenu aucun financement pour cette recherche.

References:

1. Aubreville, A. (1948). *Etude sur les forêts de l'Afrique Équatoriale Française et Cameroun*, Paris, Direction de l'agriculture, de l'élevage et des forêts, 131p.
2. Carrière, S. (1999). « Les orphelins de la forêt » : influence de l'agriculture itinérante sur brûlis et des pratiques agricoles associées sur la dynamique forestière au Sud Cameroun, Thèse de doctorat en biologie des populations et écologie, Université de Montpellier, 217p.
3. Carrière, S. (2003). *Les orphelins de la forêt, pratiques paysannes et écologie forestière (Les Ntumu du Sud-Cameroun)*, Marseille, IRD Editions, 376p.
4. Djipoufack-Manetsa, V. (2011). Etude multi-échelle des précipitations et du couvert végétal au Cameroun : Analyses spatiales, tendances temporelles, facteurs climatiques et anthropiques de variabilité du NDVI, Thèse de doctorat en géographie, Universités de Bourgogne & Yaoundé 1, 322p.
5. Dounias, E., Bahuchet, S., Froment, A., et De Carine, I. (2001). Connaissance et utilisation de l'environnement par les sociétés du Centre Cameroun dans l'écotone forêt-savane, opération « Systèmes Écologiques et Actions de l'Homme », programme « Environnement-vie-société » du CNRS, rapport final, 38p.
6. Jacques-Félix, H. (1968). Evolution de la végétation au Cameroun sous l'influence de l'Homme. *Journal d'Agriculture Tropicale et de Botanique Appliquée*, XV (9-10-11) :350-356.
7. Koechlin, J. (1961). *La végétation des savanes dans le sud de la République du Congo*, Paris, ORSTOM, 310p.

8. Letouzey, R. (1985). Notice de la carte phytogéographique du Cameroun au 1/500,000. Toulouse, France : Institut de la carte internationale de la végétation.
9. Mitchard, E. T.A. et Flintrop, C.M. (2013). Woody encroachment and forest degradation in subsaharan Africa's woodlands and savannas 1982-2006. *The Philological Transactions of Royal Society B.* (en line) : <https://royalsocietypublishing.org/doi/10.1098/rstb.2012.0406> (consulté le 22/04/2023).
10. Mopi Touoyem, F. (2022). Contribution des systèmes agroforestiers à base de cacaoyers à la dynamique des savanes périforestières sur le confluent Mbam-Sanaga au Centre Cameroun, Thèse de doctorat PhD en géographie, Université de Yaoundé I, 382p
11. Ntsama, C.V. (2020). Mises en valeur agricoles et dynamique des savanes autour de Bafia, Mémoire de Master en géographie, Université de Yaoundé I, 117p
12. Sagang Takougoum L-B. (2022). Monitoring Forest-Savanna dynamics in the guineo-congolian transition area of the Centre Region of Cameroon, Thèse de doctorat/PhD en botanique et écologie, Université de Yaoundé I, 166p.
13. Sagang Takougoum, L-B., Ploton, P., Viennois, G., Féret, J-B., Sonké, B., Couteron, P., et Barbier, N. (2022). Monitoring vegetation dynamics with open earth observation tools : the case of fire-modulated savanna to forest transition in Central Africa. *ISPRS Journal of Photogrammetry and Remote Sensing*, 188 :142-156.
14. Sanctoir, C. (1992). *Sous l'empire du cacao, étude diachronique de deux terroirs camerounais*, Paris, ORSTOM éditions, 192p.
15. Schwartz, D., Elenga, H., Vincens, A., Bertaux, J., Mariotti, A., Achoundong, G., Alexandre, A., Belingard, C., Girardin, C., Guillet, B., Maley, J., De Namur, C., Reynaud-Farrera, I., et Youta Happi, J. (2000). Origine et Evolution des savanes des marges forestières en Afrique Centrale Atlantique (Cameroun, Gabon, Congo) : approche aux échelles millénaires et séculaires. In : Servant, M. et Servant-Vildary, S., (dir.). *Dynamique à long terme des écosystèmes forestiers tropicaux*, UNESCO & IRD :325-338
16. Seignobos, C. (2000). Parcs et végétations anthropiques. *Atlas de la province de l'Extrême-Nord Cameroun*, IRD éditions, MINREST/INC,
17. Stevens, N., Lehmann, C. E.R., Murphy Brett, P., et Durigan, G. 2016. Savannah woody encroachment is widespread accross three continent. *Global Change Biology*, (3) : 235-244.
18. Villiers, J-F. (1995). La végétation. In : Sanctoir, C., et Bopda, A., (dir.). *Atlas Régional du Sud Cameroun*.

19. Youta Happi, J. (1998). Arbres contre graminées : la lente invasion de la savane par la forêt au centre-Cameroun, Thèse de doctorat en géographie, Université de Paris IV, 237p.
20. Youta Happi, J., Bonvallet, J., Hotyat, J., Achoundong, J.G., Dessay, N., Guillet, B., Peltre, P., Schwartz, D., Servant, M., et Simonneaux, V. (2003). Bilan de la dynamique du contact forêt-savane en quarante ans (1950-1990) dans la région du confluent du Mbam et du Kim, Centre-Cameroun. In : Froment, A. & Guffroy, J. (dir.). *Peuplements anciens et actuels des forêts tropicales*. Paris, IRD : 212-218.
21. Youta Happi, J., Hotyat, M., et Bonvallet, J. (2000). La colonisation des savanes par la forêt à l'est du Cameroun. In : Servant, M. et Servant-Vildary, S., (dir.). *Dynamique à long terme des écosystèmes forestiers tropicaux* UNESCO & IRD :423-427.

Évaluation de l'Impact de la COVID-19 Sur la Filière Thonière au Port d'Abidjan (Côte d'Ivoire)

Hien Dékoun Justin

Université Félix Houphouët Boigny (Côte d'Ivoire)

Kouman Koffi Mouroufié

École Normale Supérieure-Abidjan

Koffie – Bikpo Céline Yolande

Université Félix Houphouët Boigny

[Doi:10.19044/esj.2024.v20n11p102](https://doi.org/10.19044/esj.2024.v20n11p102)

Submitted: 10 January 2024

Accepted: 22 April 2024

Published: 30 April 2024

Copyright 2024 Author(s)

Under Creative Commons CC-BY 4.0

OPEN ACCESS

Cite As:

Hien D.J., Kouman K.M. & Koffie – Bikpo C.Y. (2024). *Évaluation de l'Impact de la COVID-19 Sur la Filière Thonière au Port d'Abidjan (Côte d'Ivoire)*. European Scientific Journal, ESJ, 20 (11), 102. <https://doi.org/10.19044/esj.2024.v20n11p102>

Résumé

La crise sanitaire du coronavirus qu'a connue le monde à partir de décembre 2019 a causé d'importants bouleversements sur divers plans. Les répercussions sur les activités économiques ont été, pour la plupart, causées par l'ensemble des mesures de restriction adoptées par les différents États pour freiner la propagation du virus. Face à cette pandémie, l'État ivoirien a été très réactif dès le début de la crise. L'état d'urgence a été déclaré le 23 mars 2020 et a eu des impacts néfastes sur plusieurs secteurs d'activité. La filière thonière ivoirienne, marquée par une forte mobilité aussi bien nationale qu'internationale, n'a pas été épargnée par ces impacts.

Le présent article est une contribution à l'évaluation des impacts néfastes de cette crise sur la filière thonière au port d'Abidjan. Réalisé à partir de la méthodologie de recherche documentaire et d'enquêtes de terrain. L'enquête de terrain a consisté à la réalisation d'entretiens avec les acteurs de la filière industrielle et le questionnaire a été administré à ceux de la filière faux thon. Il ressort de cette recherche que l'impact du coronavirus 2019 sur la filière thonière est très multiforme. La filière informelle du faux thon qui enregistre des acteurs très peu organisés a été plus impactée que celle de la transformation industrielle et ses industries annexes. Ces impacts ont été causés par les mesures de restriction adoptée par le gouvernement ivoirien

dans le cadre de la lutte contre la propagation de la pandémie. Dans l'ensemble, les acteurs de la filière ont mobilisé des ressources financières et logistiques pour faire face à la propagation de la pandémie. Ces efforts ont aussi contribué à ressentir l'impact de la pandémie dans la mesure où il a fallu mobiliser des ressources qui n'étaient pas prévues pour la cause.

Mots-clés: Port, coronavirus, filière, thon, impact

Evaluation of the Impact of COVID-19 on the Tuna Sector at the Port of Abidjan (Ivory Coast)

Hien Dékoun Justin

Université Félix Houphouët Boigny (Côte d'Ivoire)

Kouman Koffi Mouroufié

École Normale Supérieure-Abidjan

Koffie – Bikpo Céline Yolande

Université Félix Houphouët Boigny

Abstract

The coronavirus health crisis that the world has experienced since December 2019 has caused significant upheaval in various respects. The impact on economic activities was, for the most part, caused by all the restrictive measures adopted by the various States to curb the spread of the virus. Faced with this pandemic, the Ivorian State has been very reactive since the beginning of the crisis. The state of emergency was declared on March 23, 2020, and had adverse impacts on several sectors of activity. The Ivorian tuna industry, marked by strong national and international mobility, has not been spared by these impacts.

This article is a contribution to the assessment of the adverse impacts of this crisis on the tuna industry at the port of Abidjan. Realized from the methodology of documentary research and field surveys. The field survey consisted of interviews with the actors of the industrial sector and the questionnaire was administered to those of the fake tuna sector. It appears from this research that the impact of coronavirus 2019 on the tuna industry is very multifaceted. The informal sector of fake tuna, which has very few actors, has been more affected than that of industrial processing and its related industries. These impacts were caused by the restrictive measures adopted by the Ivorian government as part of the fight against the spread of the pandemic. Overall, stakeholders in the sector mobilized financial and logistical resources to cope with the spread of the pandemic. These efforts have also contributed to the impact of the pandemic as resources have had to be mobilized that were not

intended for the cause.

Keywords: Coronavirus, industry, tuna, impact, Port

Introduction

Fin décembre 2019, les autorités de Santé Publique chinoises ont signalé plusieurs cas de syndrome respiratoire aigu dans la ville de Wuhan, province du Hubei, en Chine. Les scientifiques chinois ont rapidement identifié un nouveau coronavirus comme principal agent causal. Il s'agit d'une nouvelle souche qui n'a pas été identifiée auparavant chez l'homme. Le virus responsable est appelé coronavirus du syndrome respiratoire aigu sévère 2 (SARS-CoV-2) et la maladie est dénommée coronavirus 2019 (COVID-19). Les principaux symptômes sont la fatigue, la toux, la fièvre et les difficultés respiratoires. L'épidémie initiale à Wuhan s'est propagée, affectant d'autres parties de la Chine. Très rapidement, le virus se répand dans le monde entier touchant plusieurs pays en Europe, en Amérique et en Afrique. En Côte d'Ivoire, le premier cas de la maladie à coronavirus 2019 a été confirmé le 11 mars 2020. L'État ivoirien a pris des mesures pour endiguer sa propagation. Ce sont, entre autres, l'instauration d'un couvre-feu de 21 h à 5 h du matin, la fermeture des frontières, l'interdiction de déplacement entre Abidjan et les villes de l'intérieur du pays sans autorisation, la fermeture des restaurants, des maquis et des bars, la fermeture des établissements scolaires et universitaires. Comme nous pouvons le constater, tout ce dispositif préventif censé combattre la Covid-19 aura nécessairement pour conséquence d'influer sur la vie quotidienne des populations ivoiriennes. Ces mesures ont, comme il fallait s'y attendre, eu des effets sur les activités économiques dans l'ensemble et sur les acteurs de la filière informelle du thon en particulier. Selon l'INS et PNUD (2020, p. 23), plus de 94 % des chefs d'Unité de Production Informelle (UPI) ont eu leurs activités affectées. Au mois de mars 2020, l'ensemble des agrégats économiques des entreprises sont en baisse par rapport à leur niveau en février. Ainsi, la production des UPI industrielles est en baisse de 85 %, leurs bénéficiaires le sont à 84 % et les commandes des clients ont chuté de 81 % (INS et PNUD, 2020, p. 22).

La filière thonière au port d'Abidjan est une activité qui s'articule autour des unités de transformation industrielle. Cette filière installée dans les années 1960 est le résultat d'un processus mondial de délocalisation de l'industrie thonière des pays du nord vers ceux du sud où elle bénéficie du faible coût de la main-d'œuvre et de la proximité des zones de pêche les plus productives. Au port d'Abidjan, les produits de la filière de transformation industrielle sont essentiellement tournés vers l'exportation. Cette industrie supranationale est l'une des plus complexes au sein de l'industrie des produits halieutiques. Sa complexité donne lieu à une minutieuse sélection du thon

pêché avant toute opération de transformation ; ce qui aboutit naturellement à des rejets. Ces rebuts, autrefois rejetés en mer, ont fini par trouver un point de chute très lucratif à l'occurrence le marché de faux thon.

Considéré comme la fraction de capture de la pêche thonière industrielle consommée localement, le « faux poisson » ou « faux thon » est une appellation commerciale attribuée à aux captures non admises en conserverie et qui alimentent une sous filière de consommation locale. Cette dernière occupe une place importante dans les activités commerciales des grandes industries de pêche d'Abidjan. À la différence de la filière de transformation industrielle du thon, celle du faux thon fait intervenir une foule de petits marchands qui s'approvisionnent directement auprès des navires. En effet, les conserveries ivoiriennes ne traitent que trois espèces des thons majeurs notamment le listao (*Katsuwonus pelamis*), l'albacore (*Thunnus albacares*) et le patudo (*Thunnus obesus*). Parmi ces espèces cibles, celles qui sont trop petites (moins de 1,5 kg), abîmées, mal congelées, écorchées, blessées ou trop salées sont considérées comme du « faux thon » et par conséquent rejetées. L'autre partie des faux thons est constituée par les prises accessoires c'est-à-dire la part de captures des navires de pêche qui n'est ni triée, ni rejetée en mer. Il s'agit, dans ce dernier cas, des espèces de thonidés mineurs à savoir l'auxide (*Auxis thazard*) et la thonine (*Euthynnus alletteratus*), mais aussi les espèces apparentées constituées de poisson-banane (*Elagatis bipinnulata*), de baliste (*Balistes spp.*), de barracuda (*Sphyraena spp.*) et de thon blanc (*Acanthocibium solandri*). L'ensemble de ces rejets constitue la principale ressource de la filière faux thon qui alimente le marché local ; un marché très attractif et lucratif. En dépit de son caractère informel, elle est relativement bien structurée depuis 2003. Certains senneurs du Ghana par exemple, l'ont intégré à leur stratégie de pêche, car elle est, à certaines occasions, plus rémunératrice que celle organisée par les conserveries COFREPECHE (2012, p. 73).

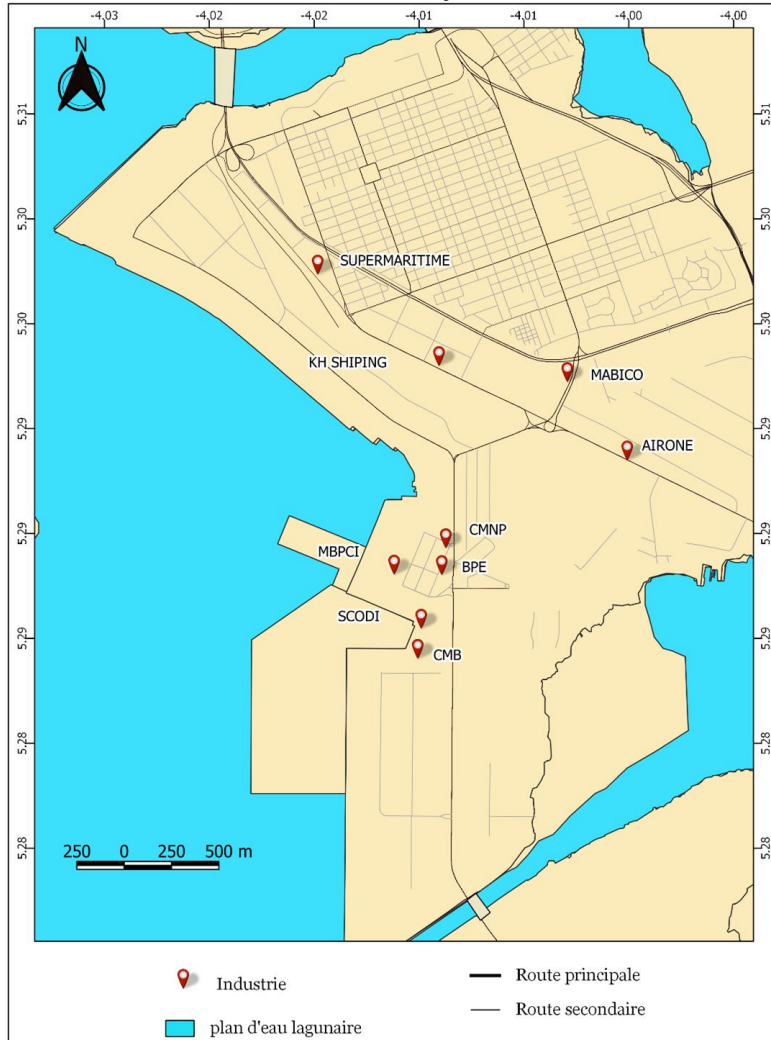
Quelles sont alors les incidences de cette crise sur la filière thonière au port d'Abidjan ? Cette interrogation amène à analyser les impacts de cette crise sur l'industrie thonière au port d'Abidjan. Elle se fonde sur le postulat que cette crise mondiale a eu des effets négatifs sur la filière du thon au port d'Abidjan.

I - Méthode de collecte des données

La collecte des données s'est faite par la recherche documentaire et l'enquête de terrain. Les données secondaires sont issues de divers documents. Il s'agit d'ouvrages généraux, de documents administratifs, des revues scientifiques consultées sur internet et dans les bibliothèques de l'Institut de Géographie Tropicale (IGT), de l'Institut de Recherche et de Développement (IRD), du Centre de recherches Océanologiques (CRO), des centres de

documentation de la Direction de l'Aquaculture et des Pêches (DAP) et du Port Autonome d'Abidjan (PAA). En dépit de l'utilité de ces données livresques, certaines insuffisances nous ont conduit à l'enquête de terrain aux moyens d'entretiens, d'enquête par questionnaire et d'observation de terrain. Les entretiens ont eu lieu d'août 2020 à juin 2021. La figure ci-dessous présente la répartition géographique des sièges des principales entreprises qui interviennent dans la filière industrielle du thon au Port d'Abidjan.

Figure 1. Localisation des principales entreprises de la filière industrielle du thon au Port d'Abidjan



Source : Nos enquêtes, 2020-2021

Réalisation : HIEN Dekoun,

En dehors de l'entreprise CMNP qui n'a pas donné de suite favorable à notre demande, toutes les autres entreprises de la filière industrielle du thon au Port d'Abidjan (figure 1) ont été visitées dans le cadre de nos enquêtes.

L'enquête par questionnaire a, quant à elle, été utilisée auprès des principaux acteurs qui interviennent dans la chaîne de valeur de la sous filière à savoir les mareyeurs en tant que premiers acteurs la chaîne de distribution, les vendeurs de garba et les transformateurs. Dans le cas de cette enquête, nous avons utilisé la méthode du choix raisonné et appliqué le principe de Depelteau qui recommande d'interroger au minimum 30 personnes dans une zone dénombrement. À partir de ce principe, ont été enquêtées 269 personnes réparties dans le tableau ci-dessous.

Tableau 1. Répartition des acteurs enquêtés

Type d'acteur	Effectif	Lieu d'enquête
Mareyeurs	89	Port d'Abidjan
Vendeurs de garba	150	Abobo, Cocody, Koumassi, Treicheville et Yopougon (communes d'Abidjan)
Transformateur	30	Abobo-Doumé, Locodjro et Vridi-Zimbabwe (site de fumage à Abidjan)
Total	269	

Source : Enquêtes HIEN Dekoun, 2021

À l'issue de la phase d'enquête, les données collectées ont été soumises à un traitement manuel et à l'informatique. La technique manuelle a consisté au tri et au regroupement des données qualitatives et quantitatives. Le traitement numérique s'est fait à l'aide des logiciels Word (pour le traitement de texte), Excel (pour la réalisation des tableaux et graphiques), QGIS 3.22 (pour la confection des cartes).

II- Résultats

Les résultats obtenus se présentent en deux parties. La première, consacrée aux impacts néfastes du COVID-19 sur de la filière industrielle, s'articule autour des unités de transformation et des entreprises annexes. La seconde présente les impacts sur la sous-filière faux thon.

1- Des activités de la filière du thon au port d'Abidjan partiellement impactées par la crise de la COVID-19

1.1- Une industrie de transformation thonière très peu impactée par le COVID-19

Les entretiens avec les responsables des deux conserveries ont montré que cette industrie n'a subi que très peu de dommages liés à la pandémie. Il n'y a que le volet commercial des produits finis de ces deux entreprises qui a été éprouvé. Ces produits sont, en effet, essentiellement destinés à être exportés sur le marché de l'UE. Mais, la fermeture des frontières et les mesures

de confinement ont engendré une baisse des commandes des clients européens. Cette baisse a plus été observée au niveau des grosses boîtes de conserve de thon destinées à la restauration publique. En raison du confinement, ces restaurants ont constaté une diminution de leurs activités. Cependant, la vente des petites boîtes à destination des ménages a très peu été impactée, car étant confinés, les clients continuaient à commander et consommer le thon chez eux comme nous l'a relaté un responsable de conserverie. Néanmoins, les conserveries font face à des difficultés d'approvisionnement en matière première et de décaissement des fonds pour faire face à la pandémie.

1.2- Des sociétés de consignation/manutention fortement ébranlées par les mesures barrières

La distribution du faux thon sur le marché ivoirien est principalement assurée par les armateurs des thoniers. En effet, les débarquements et les destinations des cargaisons de poisson des navires se font selon leurs instructions. Aucun armateur ne résidant sur le territoire ivoirien. Ils y sont représentés par des consignateurs.

Au niveau des sociétés de consignation/manutention, le constat est le même sur l'ensemble des quatre sociétés (CMB, Supermaritime, Mabico et KH shipping). L'impact le plus notable est lié au changement d'équipage, car, selon les responsables la direction du Port d'Abidjan, une circulaire a interdit le relais des marins. En effet, les marins engagés sur les thoniers font deux marées de 45 jours chacune à l'issue desquelles ils procèdent à un changement d'équipage. L'interdiction de relais a obligé certains marins à rester plusieurs mois sur les navires (6 à 7 mois). Face à cette situation intenable pour les membres d'équipage, la solution trouvée par ces sociétés en accord avec la direction du port est de procéder au confinement des marins dans un hôtel pendant 14 jours et de leur faire passer un test PCR (Polymerase Chain reaction) avant leur embarquement. Cela ne concernait que les marins qui devaient embarquer et non ceux qui viennent de finir leur marée. Les armateurs, par l'intermédiaire de leurs consignataires, procédaient donc à leur confinement avant tout embarquement. Ceux embarqués sur les thoniers pour des marées de 45 jours n'étaient pas concernés. Les coûts liés au confinement des marins avant embarquement étaient des dépenses supplémentaires auxquelles les armateurs devaient faire face. En outre, le recrutement des marins novices pour assurer le relais était perturbé d'autant plus que certains faisaient plus de deux marées sans descendre.

2- Une sous filière du « faux thon » fortement perturbée par le COVID

Le « faux poisson » ou « faux thon » est une appellation commerciale attribuée aux captures non admises en conserverie et qui alimentent une sous-filière de consommation locale. Cette dernière occupe une place importante dans les activités commerciales des grandes industries de pêche d'Abidjan. À la différence de la filière industrielle du thon, celle du faux thon fait intervenir une foule de petits marchands qui s'approvisionnent directement auprès des navires. Certains senneurs, du Ghana par exemple, l'ont intégré à leur stratégie de pêche, car elle est, à certaines occasions, plus rémunératrice que celle organisée par les conserveries. En effet, les conserveries ivoiriennes ne traitent que trois espèces de thons majeurs, notamment, le *listao*, l'*albacore* et le *patudo*. Parmi ces espèces cibles, celles qui sont trop petites (moins de 1,5 kg), abîmées, mal congelées, écorchées, blessées ou trop salées sont considérées comme du « faux thon » et donc rejetées par les usines. L'autre partie des faux thons est constituée par les prises accessoires c'est-à-dire la part des captures des navires de pêche qui n'est ni triée ni rejetée en mer. Il s'agit des espèces de thonidés mineurs à savoir l'auxide (*Auxis thazard*) et la thonine (*Euthynnus alletteratus*), mais aussi des espèces apparentées constituées de poisson-banane (*Elagatis bipinnulata*), de baliste (*Balistes spp.*), de barracuda (*Sphyraena spp.*) et de thon blanc (*Acanthocibium solandri*).

Contrairement à la filière industrielle, celle-ci est très peu structurée avec une myriade d'acteurs intervenant dans l'ensemble de la chaîne de distribution. Parmi ceux-ci, seuls les principaux acteurs à savoir les mareyeurs, les transformateurs et les vendeurs de *garba* ont principalement été ciblés par cette étude. Le tableau suivant présente les effets majeurs de la COVID-19 signalés par ces acteurs.

Tableau 2. Impact de la crise sur les acteurs de la filière informelle du thon

Type d'acteur	Aucun impact	Arrêt/baisse de l'activité	Manque de provision	Baisse de la clientèle	Total (%)
Mareyeurs de faux thon	12,33	65,75	6,85	15,07	100
Transformateurs de thon	9,09	24,24	54,55	12,12	100
Vendeurs de <i>garba</i>	4,67	88,00	00	7,33	100

Source : Enquêtes HIEN Dekoun, 2021

Comme l'indique ce tableau 2, seulement 12,33 % des mareyeurs du faux thon ont déclaré n'avoir pas été impactés par le COVID-19. Parmi les mesures prises par le gouvernement, la fermeture des restaurants a fortement et négativement influé sur le mareyage. Au niveau des vendeurs de *garba*, plus de 95 % ont déclaré avoir été fortement touchés et 88 % ont totalement ou partiellement arrêté leurs activités. D'une durée variante entre deux semaines

et deux mois, la fermeture des *garbadrômes* (points de vente du *garba*), principaux canaux de vente du faux thon, a naturellement entraîné les ventes aux mareyeurs. Selon les informations recueillies auprès des acteurs, la presque totalité des grossistes et détaillants avait du poisson sous la main sans possibilité de le vendre. Ils ont, à 65 %, déclaré avoir subi une baisse et/ou un arrêt de l'activité tandis que 15 % ont enregistré une baisse de la clientèle. Cette situation les a obligés à conserver pendant longtemps les invendus entraînant une saturation des différentes structures de conservation de poisson du terminal à pêche du port d'Abidjan. Selon le directeur d'exploitation de la SOCEF, principale structure de conservation du faux thon, « *à cette période, il n'y a plus place dans l'établissement et les demandes ne faisaient que se succéder sans toutefois obtenir de satisfaction* ».

Par ailleurs, avec le blocus du district d'Abidjan, l'approvisionnement des villes de l'intérieur de la Côte d'Ivoire était interrompu. Le marché de poisson du terminal à pêche était la seule alternative, et le poisson était déposé sur les bâches, sans possibilité d'écoulement ni de conservation. Les grossistes abonnés aux armateurs étaient aussi dans l'obligation de prendre la totalité du faux thon des quelques thoniers qui fréquentaient le port d'Abidjan. C'était, pour eux, l'unique moyen de pouvoir conserver leur contrat avec leurs armateurs et de garantir leur marché. Pour 65 % des mareyeurs, les mesures barrières ont entraîné la baisse ou à la fermeture de l'activité. Pour 6,85 %, pendant cette période, la fréquence des thoniers avait également baissé tandis que 15 % déplorent la baisse de la clientèle. Les transformateurs ont aussi, à plus de 90 %, été impactés. 54 % d'entre eux avancent le manque de provision contre 24 % pour l'arrêt de l'activité et 12 % pour la baisse de la clientèle.

Avec 95 % de taux d'affectés, les vendeurs de *garba* sont les plus touchés. 88 % d'entre eux ont déclaré avoir enregistré une baisse, voire l'arrêt de leurs activités ; la durée de fermeture de leurs points de vente variant de deux semaines à deux mois selon les communes. Dans celle d'Abobo, par exemple, la police autorisait l'ouverture des *garbadrômes* dans certains quartiers, mais à condition que les clients ne s'y entassent et ne consomment sur place. La clientèle était donc obligée de faire des commandes à emporter. Ces mesures ont été adoptées, par la suite, dans la commune de Yopougon. D'ailleurs, 7 % des vendeurs ont évoqué avoir enregistré une baisse de la clientèle. Mais, personne n'a évoqué le manque de provision, car, en cette période, selon certains mareyeurs, le poisson était en abondance et vendu à vil prix.

3 - Engagement des acteurs contre la COVID-19 : un manque à gagner important

Dans l'ensemble, les acteurs de la filière du thon ont mené des actions dans le cadre de la lutte contre la pandémie de la COVID-19 à travers la mise

en application de diverses mesures de prévention. Les entreprises impliquées dans la filière industrielle du thon ont adopté plusieurs mesures de prévention allant de la sensibilisation à la distribution de kit de protection aux employés. Nous avons pu observer sur les sites de ces entreprises des installations diverses notamment : des dispositifs de lavages de mains, du personnel pour la prise de la température, des pancartes et banderoles de sensibilisation à l’endroit des employés et visiteurs. La photo ci-dessous présente une installation de désinfection au terminal à pêche d’Abidjan.

Photo 1. Installation de désinfectant au terminal à pêche d’Abidjan



Cliché : HIEN Dekoun, 2020

Ce dispositif (photo 1) installé à la rentrée du bureau du terminal à pêche permettait une désinfection complète de toute personne qui devait y entrer. De plus, le passage était obligatoire pour tout usager de ces locaux. S’agissant des acteurs de la filière informelle, ces actions ont été moins importantes et moins structurées que celles de la filière industrielle. Le tableau ci-dessous présente les actions menées par les acteurs dans le cadre de la lutte contre la pandémie.

Tableau 3. Actions menées par les acteurs de la filière thonière dans le cadre de la lutte contre la COVID-19

	Aucune	Installation de dispositif de lavage des mains	Respect de la distanciation sociale	Sensibilisation des clients	Total
Types d’acteurs					
Mareyeurs de faux thon	19,18	31,51	36,99	12,33	100
Transformateurs	10,00	10,00	53,33	26,67	100
Vendeurs de garba	12,00	88,00			100

Source : Enquêtes HIEN Dekoun, 2021

Dans l'ensemble, les acteurs de la filière se sont engagés, à divers degrés, dans la lutte contre la pandémie à coronavirus. Ainsi, seulement 19 % des mareyeurs de faux thon ont déclaré n'avoir mené aucune action contre 31,5 % qui ont installé des dispositifs de lavages des mains. 36,9 % ont estimé avoir respecté les mesures de distanciation sociale et 12,3 % ont déclaré avoir fait de la sensibilisation des clients. Concernant les transformateurs, 10 % n'ont mené aucune action contre la COVID-19. Cependant, 10 % ont installé des dispositifs de lavage de mains ; 53,3 % ont observé les mesures de distanciation sociale tandis que 26,6 % ont déclaré avoir fait de la sensibilisation des clients.

Parmi les vendeurs de *garba*, seulement 12 % n'ont mené aucune action alors que 88 % ont installé les dispositifs de lavage de mains. Ce taux élevé s'explique par le fait que, bien avant l'avènement du COVID-19, ils avaient des bassines pour le lavage de mains des clients avant et après la consommation. Ainsi, certains ont simplement remplacé les bassines et seaux habituels de lavage de mains par les dispositifs classiques qui ont émergé avec l'avènement de cette crise. La photo ci-dessous présente un dispositif de lavage de mains installé devant un *garbadrôme* dans la commune de Yopougon.

Photo 2. Installation d'un dispositif de lavage de mains devant un *garbadrôme* de Yopougon



Cliché : HIEN Dekoun Justin, 2021

Comme on peut l'apercevoir sur la photo 2, ce dispositif permet une utilisation à usage unique de l'eau de lavage des mains.

4- Des acteurs très peu bénéficiaires des mesures d'accompagnement

En vue de faire face aux conséquences liées à la COVID-19, le gouvernement ivoirien a initié, dès le début, un plan national de riposte sanitaire, notamment dans son volet social et humanitaire avec la mise en place de différents fonds. Ces fonds sont destinés au soutien économique, social et humanitaire et au financement des actions de solidarité à l'égard des personnes rendues vulnérables par les effets de la pandémie.

Au titre des dispositions de préservation de l'outil de production et de l'emploi, les mesures retenues concernent :

- la mise en place d'un fonds de soutien au secteur privé pour un montant de 250 milliards de FCFA, prenant en compte le renforcement du soutien aux PME pour au moins 100 milliards de FCFA et la mise en place de fonds de garantie afin d'avoir un effet de levier sur l'accès au crédit ;
- la mise en place d'un fonds spécifique d'appui aux entreprises du secteur informel touchées par la crise pour un montant de 100 milliards de FCFA ;
- le soutien aux principales filières de l'économie nationale notamment l'anacarde, le coton, l'hévéa, le palmier à huile, le cacao et le café pour un montant de 250 milliards de FCFA ;
- le soutien à la production vivrière, maraîchère et fruitière pour un montant de 50 milliards de F CFA, dont 20 milliards au titre des intrants ;

Pour bénéficier de ces mesures d'accompagnement, certaines dispositions devaient être prises par les demandeurs. Ainsi, il était nécessaire de s'enregistrer sur le site du gouvernement ou dans certaines mairies. Toutes les entreprises de la filière industrielle ont affirmé avoir constitué des dossiers à la demande du gouvernement pour bénéficier des mesures d'accompagnement. Cependant, aucune d'elles n'avait bénéficié de ce soutien à la date de nos enquêtes.

S'agissant de la filière informelle, cette procédure a très peu été suivie par l'ensemble des acteurs. Le tableau 3 renseigne sur l'assistance reçue par les acteurs de la filière thonière dans le cadre de la lutte contre la pandémie.

Tableau 3. Proportions des acteurs ayant perçu une aide financière pour faire face à la crise de la COVOD-19

Type d'Acteur	Nombre d'inscrits	Pourcentage d'inscrits pour bénéficier d'aide	Nombre de bénéficiaires	Pourcentage de bénéficiaires
Mareyeurs faux thon	24	28,91	3	12,5
Transformateurs	10	33,33	0	00
Vendeurs de <i>garba</i>	6	4	0	00
Total	40	15,02	3	7,5

Source : Enquêtes HIEN Dekoun, 2021

Seulement 28,91 % des mareyeurs de faux thon se sont fait enregistrer pour bénéficier des mesures de soutien. Mais, seulement trois (14 %) ont bénéficié d'un soutien financier effectif. Parmi ceux-ci, deux ont reçu chacun la somme de 300 000 FCFA et le troisième a reçu 450 000 F CFA. Selon eux, l'information concernant ce soutien leur ait parvenu par SMS et à l'un d'eux d'ajouter : « *certainement que d'autres ont reçu les mêmes messages, mais n'y ont pas prêté attention ou encore l'ont tout simplement supprimé* ». Aucun artisan-pêcheur ne s'est fait enregistrer pour en bénéficier. 33,33 % des transformateurs ont effectué cette inscription après avoir été informés et encouragés par leurs différentes coopératives. Mais, jusqu'à la période de nos enquêtes, aucun n'a reçu un retour favorable. Certains mareyeurs et transformateurs interrogés ont révélé qu'ils n'y croyaient plus vu le temps que cela avait mis sans retour. Quant aux vendeurs de *garba*, seulement 4 % ont déclaré avoir déposé des dossiers auprès de la mairie pour bénéficier de ce soutien financier. Mais aucun n'a reçu de retour favorable.

Dans le souci de faire le point sur les préjudices causés à la filière faux thon par la situation de crise sanitaire, la direction du terminal à pêche a organisé une rencontre avec les mareyeurs grossistes et demi-grossistes de faux thon, le 25 novembre 2020. Au cours de celle-ci, ils ont, dans l'ensemble, évoqué un préjudice considérable, surtout sur la période de confinement et du blocus du district d'Abidjan. À cet effet, ils ont tenu à faire savoir que les conséquences de la fermeture des *garbadrômes* à la suite de la décision du gouvernement de la fermeture des bars, maquis et restaurants sont fortement ressenties au niveau du terminal à pêche d'Abidjan, puisqu'une partie de leur clientèle est constituée des tenanciers de restaurants. La location des chambres froides et des conteneurs frigorifiques pour le stockage du poisson au terminal à pêche leur a occasionné des frais supplémentaires. Ils ont également exprimé leurs regrets de la non-assistance de l'État à leur égard. Enfin, pour amortir ces pertes, ils ont demandé la réduction des coûts des taxes sur leurs marchandises et du droit d'exercer pour l'année à venir. Répondant à ces plaidoiries, le Directeur du terminal à pêche a exprimé son incapacité à prendre une telle décision, car relevant de la Direction Générale. La photo ci-après présente la rencontre.

Photo 3. Rencontre des autorités portuaires et les mareyeurs faux thon



Cliché : HIEN Dekoun, 2021

Au regard de cette photo 3, on constate une présence massive des mareyeurs (identifiable sur la photo à travers leur chasuble flanquée des initiales de leur établissement) que la salle de réunion du terminal à pêche avait du mal à contenir. Cette mobilisation démontre leur attente à cette rencontre qui devrait faire le point des préjudices causés par la pandémie sur leur activité.

III- Doscussion

La filière thonière a été impactée de manière multiforme par la pandémie de la COVID-19. Au niveau de la filière formelle, l'impact a été très peu ressenti par les unités de transformation. En revanche, la filière informelle a, quant à elle, été plus perturbée par la mise en pratique des différentes mesures de restriction annoncées par le gouvernement ivoirien. Parmi ces mesures, celle de la fermeture des frontières a eu plus d'effets néfastes notables sur la filière industrielle. La filière faux thon a, quant à elle, été plus affectée par les décisions liées à la fermeture des restaurants et à l'isolement du district d'Abidjan. Ces résultats corroborent ceux de INS et PNUD (2020, p. 27) qui estiment que le couvre-feu a, à 53,4 %, fortement influé négativement sur les activités des Unités de Productions Informelles (UPI). Les auteurs soulignent, par ordre d'influence, successivement l'isolement de la ville d'Abidjan (43,6 %), la fermeture des écoles (29,8 %) et des frontières (26,8 %). La décision de fermeture des maquis et des restaurants n'intervient qu'en cinquième position (22 %). Compte tenu d'importantes mesures d'hygiène et de contrôle mises en place sur les sites industriels, aucun cas d'infection n'a été enregistré. Cela est contraire aux résultats de Tous P. et Soumaré S. (2020, p. 30) qui ont révélé deux incidents majeurs survenus dans des conserveries du Maroc et du Ghana. Celles-ci se sont alors avérées être des foyers de contagion. En revanche, les opérateurs de la pêche ont été plus impactés du fait des difficultés liées au relais des marins. Cette situation, qui n'est pas propre au port d'Abidjan, corrobore les observations de Tous P. et Soumaré S. (2020, p. 30) qui ont déjà fait le même constat dans plusieurs pays africains notamment aux Seychelles, en Mauritanie et au Maroc. S'agissant de la filière informelle, elle a plus été négativement impactée par la pandémie, car ayant enregistré l'arrêt ou la baisse de l'activité, le manque de provision et la baisse de la clientèle. Ces résultats confirment les observations de République de Côte d'Ivoire (2020, p. 44) qui soutient que les principales conséquences relevées sur les activités économiques concernent la cessation des activités, la baisse de la clientèle et l'irrégularité des activités.

Dans l'ensemble, plus de 91 % des acteurs ont déclaré avoir connu des perturbations de leurs activités. Ces résultats rejoignent ceux de INS et PNUD (2020, p. 23) pour qui plus de 94 % des chefs d'UPI ont vu leurs activités affectées par la crise sanitaire.

Conclusion

Cette étude réalisée à partir de la recherche documentaire et d'enquêtes de terrain (interview et enquête par questionnaire) a permis d'établir que la filière thonière au port d'Abidjan a été impactée par l'épidémie de la COVID-19. Cet état de fait est perceptible au niveau de la filière industrielle et de la filière informelle. Celle-ci a, dans l'ensemble, été causée par les mesures prises par l'État ivoirien pour endiguer la propagation de la maladie. Parmi ces mesures, les restrictions de la circulation des personnes et des biens, la suspension du trafic aérien, la fermeture des frontières terrestres et des ports ont le plus affecté la filière formelle. En ce qui concerne la filière informelle, les mesures de restriction sur les marchés et les lieux de restauration publics ont causé des dommages significatifs liés à l'écoulement des produits. Pour cette filière informelle qui repose sur une très grande mobilité des acteurs ainsi que des consommateurs, ces mesures ont agi comme un effet inhibiteur.

Conflit d'intérêts : Les auteurs n'ont signalé aucun conflit d'intérêts.

Disponibilité des données : Toutes les données sont incluses dans le contenu de l'article.

Déclaration de financement : Les auteurs n'ont obtenu aucun financement pour cette recherche.

Déclaration pour les participants humains

Cette étude a été approuvée par l'Université Felix Houphouët-Boigny de Cocody (Côte d'Ivoire) et les principes de la déclaration d'Helsinki ont été respectés. (Cette déclaration s'applique si vous avez distribué un questionnaire à un groupe cible ou mené un entretien dans le cadre de la recherche). à un groupe cible ou réalisé un entretien dans le cadre de la recherche).

References:

1. COFREPECHE, POSEIDON, MRAG et NFDS, 2012, *Évaluation ex-post du protocole de l'accord de partenariat dans le domaine de la pêche entre l'Union Européenne et la Côte d'Ivoire*, Contrat cadre MARE/2011/01 - Lot 3, contrat spécifique n° 2, Bruxelles, 144 p.
2. TOUS Phillippe et SOUMARE Salimata, 2020, *La pandémie de COVID-19 et le secteur des pêches en Afrique*, Banque Africaine de Développement, Abidjan, 21 p.
3. GLOBEFISH, 2014, *Tuna, Extra from GLOBEFISH Databank, Prices-Exports-imports-Production-Processing*, 68 p.
4. HIEN Dekoun Justin, KOUMAN Koffi Mouroufié et KOFFIE-BIKPO Céline Yolande, 2020, *Techniques et normes de transformation de*

- thon et ses sous-produits au port d'Abidjan (Côte d'Ivoire), *Revue Ivoirienne des Lettres, Arts et Sciences Humaines*, N° 45, 14 p.
5. INS et PNUD, 2020 : Évaluation de l'impact du COVID-19 sur le secteur informel, rapport final, mai 2020, 36 p.
 6. KONRAD Adenauer Stiftung, 2020 : Commerçants et consommateurs face au COVID-19 à Abidjan : Attitudes, réactions et perspectives, KAS, Abidjan ?, 32 p.
 7. Oceanic Développement, 2005 : *la filière thonnière européenne bilan économique, perspectives et analyse des impacts de la libéralisation des échanges*, Oceanic Développement, Concarneau, 360 p.
 8. République de Côte d'Ivoire, 2020, DOSSIER Côte d'Ivoire - Coronavirus (COVID-19), Abidjan, 49 p.
 9. UNICEF, 2020, Côte d'Ivoire : Rapport de situation COVID-19, UNICEF Côte d'Ivoire, Abidjan, 6 p.