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CROSSREF

BLACK TRAVEL (IM-) MOBILITIES IN SOUTH AFRICA: A CASE OF HISTORICAL URBAN TOURISM RESTRAINT

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Abstract : The politicization of urban tourism associated with overtourism and the growth of anti-tourism movements are leading issues in contemporary international scholarship on cities as tourism destinations. Policy-makers are challenged either to introduce limits to the numbers of visitors travelling to certain tourism destinations or for enacting interventions to block particular types of tourism. This article contributes an historical perspective to debates around the mitigation and containment of urban tourism. The focus is on South Africa where a battery of policies to restrain the mobilities of Black South African were enacted and only dismantled with the demise of apartheid. The impetus for restraint emerged from longstanding policies of racial segregation which sought to limit severely the travel mobilities of Black South Africans into the country's major cities. Policy implementation involved the regime of 'pass laws', requirements for visitor permits, and the creation of only a minimal infrastructure to support (Black) travellers with racial restrictions imposed on the provision of accommodation services.

Key words: mobilities, urban tourism, influx control, pass laws, inhospitable city

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INTRODUCTION

Tourism in cities has become a major contemporary policy and political issue (Milano et al., 2019, 2020; Rogerson and Rogerson, 2021a; van der Borg, 2022; Koens and Milano, 2024). Recently Milano et al. (2024: 5) highlighted "the

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growing politicization of tourism as a vital dimension in urban studies". Among others Murillo et al. (2011: 4) pinpoint that whilst tourist visitation to cities represents one of the earliest forms of travel "it was only during the last decades of the twentieth century that many cities became aware of its economic potential and embraced it as a key sector inside their economies". Before the 1980s Mikulic and Petric (2014: 381) state cities were rarely viewed as powerful receptive destinations for tourism but instead "mainly seen as centres that generated tourism demand towards nature and 'sun-sea-sand' destinations". The decade of the 1980s is identified as a watershed period marked by a "significant shift in attitude by cities towards the tourism industry" (Law, 1993: 1). Catalytic factors for policy interest in tourism were global economic restructuring, ongoing processes of the deindustrialization of cities and the accompanying imperative to introduce new growth sectors. Accordingly, starting during the 1980s urban tourism experienced a fundamental directional shift in many US and European cities where severe economic recession and distress triggered a burst of policy interest in tourism to reinvent and regenerate weakened city economies (Law, 1992, 1993).

From a policy perspective it was evident that "what was new was that cities now saw tourism as an industry of great potential importance and one that should be encouraged" (Law, 1992: 599). The promotion of urban tourism became a highly competitive niche and expanded significantly within the international tourism economy as increasing numbers of cities both in the Global North and Global South began to market themselves as hospitable spaces for tourism development. In several of the most visited urban tourism destinations, however, the pendulum shifted during the 2010s in the context of mounting concerns about excessive visitor numbers and resident protests about 'over-tourism'. Pasquillini (2015) writes of a 'paradigm shift' in urban tourism research with the rise of anti-tourism urban movements asserting residents' rights to the city as a signal of the end of cities' honeymoon with tourism. With global touristification and the transformation of cities into desirable destinations, social structures and place infrastructures have been restructured and fuelling resident protests (Horn and Visser, 2023; Milano et al., 2024). Colomb and Novy (2016) flag the increasing politicization of urban tourism and observe it as a crucible of contention and dispute in destinations such as Amsterdam, Barcelona, Berlin, Lisbon, Prague and Venice.

The politics of urban tourism mobilities (and im-mobilities) are highlighted as of rising academic concern by Milano et al. (2024). It is evident that protest and resistance occurs sometimes against the growth of tourism and its perceived negative impacts per se and in other instances against the appearance of particular forms of tourism which are contested or deplored (Colomb and Novy, 2016; Füller and Michel, 2014; Pasquinelli, 2015). Marked policy shifts have taken place with the former debates about boosterism and urban tourism promotion replaced now by initiatives around the 'demotion' of tourism, 'limits to tourism' and the 'de-growth' of tourism in certain urban destinations (Milano et al., 2020). Questions surrounding the management of visitor flows, placing limits upon or restraining visitor numbers are high on the policy and scholarly agenda (Koens et al., 2018; Dodds and Butler, 2019a, 2019b; Milano et al., 2019; Butler and Dodds, 2022; Milano et al., 2024).

It is against this backdrop of these fluid policy debates around the politics of contemporary urban tourism and of exclusionary practices that the aim in this paper is to contribute an historical case study of the 'restraint' of mobilities and of associated limitations on a particular group of urban tourists. The setting is South Africa where there is a long historical record of restrictions which have been imposed on the mobilities of Black (African) South Africans. The literature review situates the research as a contribution to the limited international research which investigates historical dimensions of urban tourism. The methods and historical sources used in this study are briefly profiled. The results section provides a record of the restrictions which impacted the movements of Africans in both colonial and apartheid (post-1948) era South Africa. Attention then turns to the legislative constraints that led to the racialized landscape of accommodation services that confronted potential Black visitors to the South African city until as late as 1980.

LITERATURE CONTEXT AND METHODS

In major cities tourism is not a new phenomenon; rather it has evolved from the earliest times of civilization following the birth of cities (Murillo et al., 2011; Cohen and Cohen, 2015). This said, the past development of cities as tourist destinations has remained little investigated as urban tourism research remains overwhelmingly 'present-minded' (Rogerson and Rogerson, 2019). Certainly, the prime focus of most literature on urban tourism "has been on contemporary developments in urban tourism rather than its history" (Bickford-Smith, 2009: 1765). Among the most notable contributions for North America are the works of Cocks (2001) on the rise of urban tourism in American cities at the turn of the 20th century and by Baum and Mezias (1992) on localized competition in the evolving New York hotel economy. Among European studies that address aspects of urban tourism past are useful contributions on Poland (Klodzinski, 2013), Romania (Badieli et al., 2018) and Spain (Urtasan and Gutiérrez, 2006). Another significant study for understanding patterns of urban hotel location was that by Ritter (1986) whose empirical work of hotel development in Nuremberg, Germany from the start of the 19th century crystallized a model for the evolution of hotels in tourist centres. It was demonstrated that the location of hotels was associated closely with the dominant form of transportation technology of the time and with railways the patterns of hotel development became concentrated around railway stations. With the growth of automobilities locational shifts occurred with the demise in the significance of hotel districts close to railroad stations and instead to the building of large hotels on the outskirts of the city in close proximity to the 'ring road' and access routes leading from the city centre (Shoval and Cohen-Hattib, 2001, 2006).

In their recent major review of international literature relating to the progress of research in the field of urban tourism Page and Duignan (2023: 3) observe that the growth of historical writings on urban tourism is one of the selected 'key developments' that have taken place in urban tourism research since 2011. In scholarship on urban tourism, which is dominated by works on the Global North, the undertaking of historical writings "has remained an area largely detached from mainstream tourism research" (Page and Duignan, 2023: 3). In terms of mainstream urban tourism writings, historical research "has usually been shunted into a siding and regarded, at best, as peripheral" (Walton,

2012: 49). This is especially the case in respect of research on the Global South. In the context of the development of tourism and hospitality studies in the Global South, Adu-Ampong (2019) isolates the paucity of historical research. One striking exception is the case of South Africa where over the past decade there has emerged a vibrant historical tradition in tourism scholarship including investigations surrounding urban tourism. Relevant contributions to urban tourism have been made both by historians and geographers.

For South Africa thematic historical studies exist variously on the changing accommodation services sector (Rogerson and Rogerson, 2018; J.M. Rogerson, 2018, 2020; C.M. Rogerson, 2022a), business and conference tourism (C.M. Rogerson, 2019), heritage tourism (van der Merwe, 2019; Visser, 2023; Rogerson, 2024a; van der Merwe, 2024), and the niche of recreational sea fishing (Rogerson and Rogerson, 2024a). Further urban research writings explore the making of racialized landscapes of tourism, racially segregated tourism spaces (C.M. Rogerson, 2020; Rogerson and Rogerson, 2020a), the employment conditions and life worlds of hotel waiters and bar personnel (Dhupelia-Mesthrie, 2020) and the struggles against the creation of racialised spaces on South African beaches during the apartheid period (J.M. Rogerson, 2017). In a striking contribution to the social history of urban tourism Trotter (2008) excavates the dockside sex trade of Cape Town and Durban.

The evolutionary pathways of urban tourism are unpacked for several of South Africa's major cities including Cape Town (Bickford-Smith, 2009), Johannesburg (Rogerson and Rogerson, 2019, 2021b) and Pretoria (Rogerson and Rogerson, 2022) as well as for Lourenço Marques, now Maputo, Mozambique's capital city (C.M. Rogerson, 2023). Research on the development of tourism in urban areas has extended down the settlement hierarchy to include lower tier small towns. Examples include studies on coastal resorts such as Hermanus (J.M. Rogerson, 2019; Rogerson and Rogerson, 2020b) and Mossel Bay (J.M. Rogerson and C.M. Rogerson, 2023), the spa town of Montagu (Rogerson and Rogerson, 2024b) and Oudtshoorn, the ostrich capital of the world (Rogerson and Rogerson, 2024c). The historically significant small town of Mahikeng which for many years served as the capital for colonial Bechuanaland also has come under scrutiny (Drummond et al., 2021; Drummond, 2024).

This study supplements the buoyant historical tradition in South African urban tourism scholarship. It elaborates upon the politics that underpinned Black mobilities and constrained their movements into urban areas. Our research uses historical methods which are wedded to a detailed examination of existing literature and documentation on mobilities in South Africa. Several scholars classify historical approaches as one of the beneficial and innovative approaches towards undertaking tourism and hospitality studies (Olya et al., 2020). The practice of archival research is a vital research method in geography with research investigating historical influences on contemporary places (Wideman, 2023). The political geographer Dallen Timothy (2012: 403) observes that "archival data help develop understandings of how tourist destinations grow and decline", including here for urban tourism. The study draws upon primary documentary sources obtained from the Historical Papers collections at the University of the Witwatersrand, Johannesburg where use is made of the collection relating to the South African Institute of Race Relations (SAIRR). This material is supplemented by reports and articles appearing in The Bantu World newspaper, which was a weekly outlet published from the 1930s and targeted at

the readership of the emerging middle classes and black elite (Switzer, 1988). The Cape Town depot of the South African National Library provides access to this newspaper.

RESULTS AND DISCUSSION

The results and discussion are structured into two sub-sections of discussion. The first section turns to elucidate the battery of policies and legislation which were implemented in the colonial and apartheid periods which served to restrain the mobilities of Black South Africans. The second section turns specifically to highlight the further constraints imposed by the unpromising arrival infrastructure for Black travellers to South African cities during the colonial era and the apartheid period.

Legislative Constraints on Black Mobilities

Constraints on the travel mobilities of Black South Africans were introduced long before the programme of apartheid was implemented from 1948. As Frankel (1979: 200) points out "South Africa's notorious pass laws predate the coming to power of the National Party by almost 200 years: the notion of controlling black movement in the interests of social order, to prevent crime and over-urbanization, or to channel black labour from rural to urban areas, originates as far back as 1780". Prior to the formation of the Union of South Africa in 1910 each of the four provinces had laws which applied to 'non-whites' and Africans in particular in order to control vagrancy and labour flows into particular areas. The legislation which applied to African mobilities was broadly styled as 'the pass laws'. Kahn (1949) documents that following Union in 1910 this term was applied to cover a wide variety of documents including contracts for workers, tax receipts, certificates of exemption variously under the Natives (Urban Areas) Act of 1923, the Native Administration Act of 1927 and a series of other laws "under which it has been estimated that the African was required to carry as many as 27 different identifying documents in connection with work, travel and residence" (International Commission of Jurists 1960: 28).

Influx control measures contributed to the control and 'management' of the urban Black population including with the effect of restricting the movement from rural into urban areas mainly to workers (Hindson, 1987a). Added encroachment upon the right to movement of the African population occurred through the Native (Urban Areas) Consolidated Act of 1945 as amended. This legislation accorded wide powers to magistrates to regulate the movement and employment of Africans in and about urban areas. More specifically, in terms of this legislation an African had to obtain permission to be in a 'proclaimed area' and such permission "could be refused:
- If there is a surplus of Native labour in said area,
- If the African cannot prove that he has complied with all pass regulations, or
- If by his documents, it is indicated that the African is domiciled outside the area
- has not obtained a release from the previous employer" (International Commission of Jurists, 1960: 29).

In terms of the 1945 Act the restriction was introduced also that "no African is allowed to remain for more than 72 hours in a proclaimed White area or in an area in which he (sic.) is not employed" (cited in Keyter, 1962: 58). This

meant that African visitors to so-termed 'proscribed' (ie urban) areas wishing to stay for more than 72 hours required an official visiting permit which "must indicate the purposes for which, and the period during which he may remain in the area" (Keyter, 1962: 58). This visitor permit had to be secured prior to undertaking any such travel.

The period after 1948 witnessed a draconian extension of existing controls over the geography of African mobility (Crush, 1992). Hindson (1985: 402) points out that on coming to power in 1948 the National Party began implementing an urbanization policy which was premised on measures "which would slow down and eventually reverse the movement of Africans into White-controlled urban areas" and further with the long-term apartheid goal "to settle all Africans in territorially segregated areas on an ethnic basis" and which were planned "to be developed into economically and politically independent units". From the 1950s South African urbanisation policy was framed by the objectives of 'territorial apartheid' as official policy sought to restrict the flow of Africans into the white urban areas by means of influx control and to channel 'surplus labour' to the rural 'Homeland' areas (Hindson, 1987b). The freedom and mobilities of Blacks were constrained further by the ironically named Natives (Abolition of Passes and Coordination of Documents) Act of 1952. This legislation (theoretically) abolished 'passes' as part of its consolidation of existing laws but required instead that both African men and women now be in possession at all times of 'reference books', essentially a standard pass (Frankel, 1979; Davenport and Saunders, 2000). Such 'reference books' included detailed information about places of origin, employment history, tax payments, employers' evaluations, information about criminal records as well as photographs and fingerprints. Overall, the reference book contained "the Africans employment contract, tax receipt and other references of which proof was formerly required in the form of a separate pass" (International Commission of Jurists 1960: 28) It was a requirement that such reference books be carried on the person by Africans and be produced upon demand with failure to do so deemed as a criminal offence (Rabkin, 1975).

Accordingly, far from abolishing the burdensome passes this 1952 Act merely solidified the structure of the pass system. In addition, it extended for the first time in comprehensive manner the requirement that African women be in possession of such documents (Yawitch, 1984). It was stated that the "net effect has been to introduce a new form of pass and to subject a greater percentage of the African population to powers of summary arrest and abuses thereunder" (International Commission of Jurists, 1960: 28). Any African whose pass was not in order or who failed to produce it on demand was liable to imprisonment and to be 'endorsed out' to the 'tribal rural homeland' (Rabkin, 1975: 14). A direct consequence of the tightening of pass laws was that hundreds of thousands of African continued to be imprisoned each year and treated as common criminals. In 1953 it was reported that a total of 110 427 Africans were sentenced for offences against curfew regulations or regulation of documents and 43 951 for offences against pass laws. By 1956 a total of 1 760 237 Africans were arrested for such offences.

Arguably, for Frankel (1979: 206) "the pass laws are the most tangible expression of racial discrimination since they subject blacks to a series of laws carrying a criminal sanction which do not apply to the white community". Indeed, the reference book, still called a 'pass' by white and black, "was to

become the physical symbol of white oppression and exploitation" (Rabkin, 1975: 14). If African workers were beaten and robbed by tsotsis (gangsters) in townships often they would plead for the return of the passbook the only defence against imprisonment, forced labour on farms or 'repatriation' to the rural areas (Rabkin, 1975). Resentment was strong against the obligation to carry at all times these reference books. This prompted the African National Congress to adopt the 1952 Native Abolition of Passes Act as a major focus for protest and campaign against 'passes' (Frankel, 1979). These pocket-sized identification books therefore served to radically constrain the mobilities of Black South Africans.

According to Hindson (1987b: 586) the measures for influx control into South African urban areas "were applied more comprehensively and effectively in the 1960s than in the 1950s". Influx control was exercised in terms of the Urban Areas Act through the mounting of roadblocks, street - and transport - related checks and night raids into the townships and white suburbs where servants quarters were inspected for illegal lodgers. In all these instances "the onus is on a pass bearer to prove his or her right to be in an area by producing the passbook on the spot, and satisfying the inspecting officer that it contains the necessary endorsements" (Hindson, 1985: 403). According to Frankel (1979: 200) influx control was applied to regulate black entry and exit from South Africa's major urban areas on a nationwide basis and argues the pass laws were integral to the collection of instruments "employed by the white minority to absorb blacks into the economy while maintaining political domination". This regime of control "ensured that all Africans, regardless of whether they had temporary or permanent resident permits, or were legally or illegally in an area, would be vulnerable, and periodically subjected to harassment, punishment and humiliation under the pass laws" (Hindson, 1985: 404).

For Davenport (1998) also the decade of the 1960s is viewed as the period when the most systematic application occurred of apartheid legislation. In 1964 the Minister of Bantu Administration and Development declared that a reference book was to be issued in the place where it was applied for. This policy was amended and tightened in 1965 to allow the issuance of reference books only in the area where individuals were lawfully domiciled. The crushing of organized African resistance to the pass system in the early 1960s cleared the way for the extension and streamlining of the administrative machinery of pass control which laid the basis for a more determined and ruthless implementation of territorial apartheid (Hindson, 1987b). From the early 1960s to the early 1970s, the implementation of measures for influx control therefore was greatly intensified (Hindson, 1985). The Black Sash (1974: 1) observed that the "pass laws are being evermore rigidly applied and more and more people are being affected by their implementation". This was founded on government policy which sought to reduce the number of Africans residing in 'prescribed' (urban) areas and ensure that as many as possible of workers are migrants. Accordingly, the implementation of territorial apartheid was advanced and consolidated – "in the white urban areas, African township housing construction slowed down, and eventually came to a standstill" and only "single-sex hostel accommodation was expanded to meet the ever-growing needs of industry, commerce and service sectors for African labour" (Hindson, 1985: 405).

The official 'rationale' for national policy around influx control was revealed in the statement issued in 1967 by the Secretary of Bantu

Administration of the apartheid government that Blacks "are only temporarily resident in the European areas of the Republic, for as long as they offer their labour there" (cited in Savage, 1984: 29). Overall, the battery of legislation around influx control, including the need for Africans to be in possession of visitor permits for stays exceeding 72 hours, was one of several factors that would ensure that throughout the 1950s and 1960s the numbers of Black arrivals would be restrained in the emerging tourism economy of South African cities. The next section narrows to focus on the racialized landscape of tourism and the unpromising arrival infrastructure that faced potential Black visitors to urban centres.

The Unwelcoming Arrival Infrastructure

There exists a recorded history of independent travel by Blacks in South Africa which goes back to the start of the twentieth century (Sixaba and Rogerson, 2019; Dlamini, 2020). The growth of such travel mobilities was only small-scale in volume and it was led by the mainly urban-based elite who valued the educational aspects of travel. Nevertheless, these travellers confronted a set of major difficulties beyond the legislative controls on mobilities introduced through the pass laws. The core challenges surrounded the absence of a travel and tourism infrastructure geared to the needs of Africans as travellers.

The limited infrastructure and travel difficulties can be understood at one level if examined through the lens of the emergence and development of the tourism industry in South Africa. The establishment of an infrastructure for the growth of tourism in South Africa occurred in the early decades of the 20th century and it owed much to the promotional marketing initiatives of South African Railways (SAR) (Pirie, 2011; C.M. Rogerson, 2024b). The developing infrastructure of travel and tourism was oriented almost exclusively to support the growth of domestic leisure travel of White South Africans and very importantly to attract international tourists, especially from Europe, to the country. As Dlamini (2020) reflects, from the perspective of the SAR Black travellers on trains should be only migrant workers heading to the cities – especially the gold mining centres around Johannesburg and the Witwatersrand. Importantly, in the early development of tourism in South Africa for SAR publicists' Black travellers "should have been outside being viewed through the window by local and overseas white passengers as the train went by" (Dlamini, 2020: 116).

Arguably, gazing upon 'Native life' was one of the prime attractions for tourists in South Africa during the early decades of the 20th century (C.M. Rogerson, 2022b). The advertising of South Africa emphasized the country's untouched and 'primitive' attractions (van Eeden, 2011). Grundlingh (2006: 111) stresses that deeply embedded in the initial marketing of South Africa as a tourist destination was "the juxtaposition of the 'primitive' and the 'modern'". Rassool and Witz (1996) also point to the long history of tourists being attracted to visit South Africa because of opportunities to view 'native life in its tribal state' as manifested in 'authentic African settings'. During the 1920s, a time of the beginnings of marketing for visits to South Africa from the USA, it was recognised that "with natural beauty, a comfortable climate and, not the least important, an exotic, indigenous non-western people South Africa was a natural for the tourist trade" (Wolf, 1991: 101). In 1936 a major national

survey of the country's tourism industry highlighted "the bounteous gifts South Africa has to offer in the way of varied scenic beauty, of her fauna and flora, and of her native life in all its attractive picturesqueness" (Norval, 1936: 128). The publicity material of SAR portrayed Africans in an exploitative, demeaning fashion and dehumanized people by treating them as objects. Typically, in one publication produced by the Railways in 1936 'native life' was described as contributing 'novel allure' to make South Africa "a veritable tourist paradise" (Uys, 1936: 5). The pamphlet highlighted various aspects of 'Native life' that might attract visitors, including traditional marriage ceremonies, the craft production of ornamental weapons, musical instruments, and the activities of witchdoctors (Uys, 1936).

Notwithstanding the narrative contained in the marketing publications of South African Railways that Black South Africans role was to be the object and attraction for tourism it is evident by the 1930s that there had emerged and consolidated an incipient movement of Black tourism (Sixaba and Rogerson, 2019; Dlamini, 2020). This travel was mainly driven by visits to friends and relatives and with smaller components for purposes of leisure, business and health considerations (C.M. Rogerson, 2024c). Analysis of the social pages in The Bantu World discloses a record of travel movements by the country's urban elites especially of those based in Johannesburg, South Africa's 'golden city' and economic heart (Rogerson, 2024c). In addition to being an important source of travellers Johannesburg was a notable destination for Black travellers during the 1930s. In the 'Who's Who in the News This Week', a social page of The Bantu World we learn that Miss Elizabeth Tlabane "left the city [Johannesburg] for a week's holiday in Potchefstroom. She will be the guest of her sister who is a Nurse" (The Bantu World, 31 March, 1934). Another entry in the social pages disclosed that "Mrs M. Mahamo of Ladysmith has left for home after spending a month in the city [Johannesburg] with her relatives" (The Bantu World, 4 November 1933). Further examples of the travel comings and goings of the emerging Black elite included that "Mr L.G. Leshe of Pietersburg, an old Lovedalian, is spending a holiday on the Rand and will return to Pietersburg after a fortnight" (The Bantu World, 24 December 1932) and "Mr Sol of the Crown Mines Native Hospital has arrived from Mafeking after spending a fortnight holiday" (The Bantu World, 23 September 1933). Similar reports of mobilities were reported regularly in The Bantu World throughout the 1930s and continuing after the close of World War Two. For example, in July 1945 it is revealed that "Miss Dorothy Mogoyane of the City will be leaving for Hoopstad on holiday at the end of the month" (The Bantu World, 21 July 1945).

It is evident that the vast majority of these Black travel movements occurring in the 1930s and into the 1940s involved stays at the homes of friends and relatives. This pattern of accommodation was inevitable in the wake of the limited infrastructure of commercial accommodation services that existed for Black travellers at this time. During the so-termed 'segregation' era in South Africa prior to the introduction of apartheid in 1948 "the overwhelming majority of commercial accommodation establishments in South Africa did not accept 'non-Whites'" (C.M. Rogerson, 2020: 37). As a result of informal racial segregation of accommodation, a major shortfall existed in an infrastructure of hospitality for the emerging cohort of Black travellers. One historian likewise confirms "the absence of respectable eating and sleeping places" (Dlamini, 2020: 90). A response came from the small number of Black entrepreneurs who set up

their own infrastructure of hospitality services. Sixaba and Rogerson (2019) document the operations of several of these pioneer Black entrepreneurs opening hospitality businesses in the 1920s and 1930s in small Eastern Cape centres such as King William's Town or Queenstown.

Dlamini (2020) draws attention to the annual lists of African-owned hotels and boarding houses as published from 1930 in the annual African Who's Who publication which was seen as a collective biography of the black elite during colonial times. This publication "told black travelers in colonial South Africa where they could stay and eat" and as such it was likened to the annual Negro Motorist Green Book which was a travel guide in the USA specifically produced for African-Americans in the era of Jim Crow segregation. This important guidebook sought to provide "African-American travellers a tool with which to subvert and avoid racial discrimination in twentieth-century American leisure travel" (Hall, 2014: 307). In the pages of advertisements that appeared in The Bantu World newspaper during the 1930s occasional advertising occurred of new Black-owned accommodation establishments. One such example is the advertisement which appeared for boarding and lodging offered by the Abantu Hotel in Durban. Of note is that marketing stressed that this establishment was for "educated and civilized Africans" and indicated in particular the elites of commercial travellers, ministers of religion and teachers (The Bantu World 23 July 1932).

The limited colonial accommodation infrastructure for Black tourists was further constrained by the legislative constraints which were enacted post-1948 following the electoral victory of the National Party and its implementation of apartheid policies. Under apartheid planning the informal segregation that existed of accommodation services that prevailed in the pre-1948 years was replaced by a formalized and institutionalized segregation of accommodation services. The two most critical pieces of apartheid legislation were the Group Areas Act of 1950 and The Reservation of Separate Amenities Act of 1953. As a consequence of the strictures in these two Acts the operations of hotels in South Africa were formalised now for the exclusive use of Whites as opposed to patronage by 'non-White' tourists (C.M. Rogerson, 2020). For urban areas the Group Areas Act introduced in 1950 essentially legislated for the extension across South Africa of the racial apportionment of land which had long been applied in rural areas. It "drew upon the former legislation and administrative apparatus to provide for the comprehensive racial replanning of all South African cities" (Christopher, 1990: 427). This Act provided apartheid with its ideological and material substance and was one of the key instruments for enforcement by implementing strict segregation in urban areas of the four official 'race' groups (White, Coloured, Asian, African) which were recognised in terms of the Population Registration Act.

Racial-spatial separation did not, however, mean equality with the promulgation of the Reservation of Separate Amenities Act in 1953 (Kirkby, 2022). This Act mandated that separate facilities be provided for each of South Africa's different racial groups and in their respective geographical areas on the grounds of minimizing racial contact and friction. All races were compelled by the Reservation of Separate Amenities Act 1953 to use separate public amenities in every sphere of life. Chimere-Dan (1992) views the separate amenities legislation as one of the pillars of apartheid planning. Promulgation of the Reservation of Separate Amenities Act (Act 59 of 1953) occurred in October

1953. The white minority parliament passed this Act "after existing laws that had been used to facilitate the racial segregation of public facilities hitherto were declared invalid by the highest level of the judicature" (Kirkby, 2022: 58). In Parliament the Minister of Justice stated that he found the court's decision as 'curious' in light of what he regarded as the South African 'tradition' of enforcing segregation where 'necessary' (Kirkby, 2022: 72). Accordingly, by passing Act 59 of 1953 the government circumvented the court's ruling. It is noted that this legislation was enacted with the support of the British Governor General's office in Cape Town (J.M. Rogerson, 2017). This office informed Ministers in South Africa that "in Her Majesty the Queen's name, he assents to the Bill to provide for the reservation of public premises and vehicles or portions thereof for the exclusive use of persons of a particular race or class" (Office of Governor-General of the Union of South Africa, 1953).

The Separate Amenities Act provided that a person in charge of any public premises or public vehicle might reserve these for the exclusive use of persons belonging to a particular race as defined by the 1950 Population Registration Act. Importantly, it was pointed out that the "legislation stated that such action, whether past of future, might not be ruled invalid on the grounds that provision was not made for all races, or that facilities provided for the different races were not substantially equal" (Silva and Butler-Adam, 1988: 16). Essentially therefore the apartheid government sought to enforce the racial segregation of public facilities without the pretence that this could be done without foregoing an equal treatment of different racial groups. As Kirkby (2022: 73) makes clear the "new legislation asserted that facilities would be duly segregated with no harmonisation in either the quantity nor the quality of the amenities that were allocated to each race". This measure expressly sanctioned discrimination in public places of South Africa and made legally acceptable the doctrine of 'separate and inherently unequal' (Govender, 1990). This doctrine was imposed on hospitality services during the 1950s and subsequently extended in the 1960s to forge racially segregated beaches (J.M. Rogerson, 2017). Møller and Schlemmer (1982: 3) observe that whilst beach segregation was practiced voluntarily or by convention in South Africa throughout the 20th century it "was only strictly enforced after the National Party came to power after 1948". Indeed, the rise and enforcement of beach apartheid must be interpreted as another fragment of the complex architecture around the institutionalisation of segregated racialised spaces throughout the apartheid era (J.M. Rogerson, 2017).

In terms of travel by Black South Africans the battery of apartheid legislation ushered in severe restrictions on the further development of an adequate infrastructure for supporting travel and tourism throughout the 1950s and most especially into the 1960s, the decade of so-termed 'high apartheid'. Apartheid society was constructed to be hostile, not hospitable, towards Black South Africans with racialized tourism spaces unwelcoming to them. The restraints on Africans as urban tourists are most starkly evidenced in relation to examining the commercial economy of accommodation services. The Group Areas Act and Reservation of Separate Amenities legislation re-cast the foundations for hotel development in South African cities by requiring separate accommodation service facilities for 'non-Whites' (Africans, Indians, Coloureds) as opposed to 'Whites'. This separation would be achieved through their establishment and operations in spatially discrete areas. For those categorised as 'non-White' under South Africa's racial classifications of the Population

Registration Act the commercial accommodation options related to the apartheid creation of the 'non-White hotel' (C.M. Rogerson, 2020). But many of these 'non-White' hotels were themselves further restricted in their operations for use only by those South Africans classed as Indians or Coloureds (mixed race). The most limited facilities therefore were those for use by Africans.
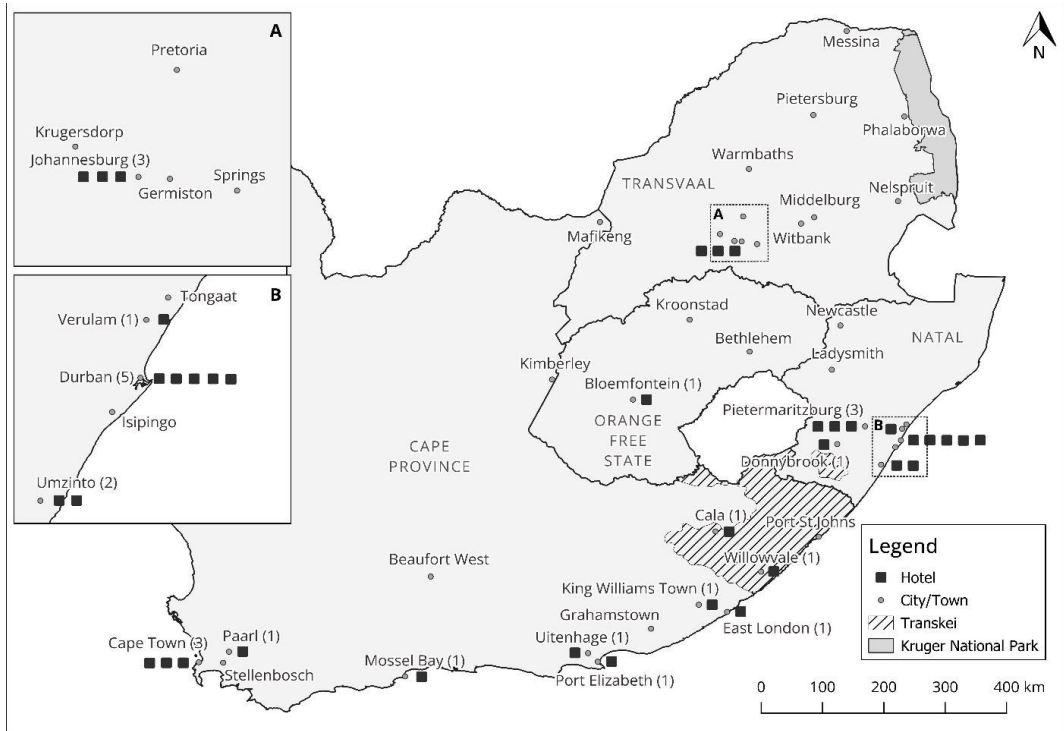
Figure 1. Distribution of Black Hotels in South Africa

The unpromising state of accommodation facilities for African travellers in the 1960s can be examined through the inventories of hospitality services that were undertaken by the South African Institute of Race Relations (Keyter, 1962; South African Institute of Race Relations, 1968). During the 1960s this organization produced two national guidebooks to provide comprehensive information on facilities available to the growing cohort of 'non-White' travellers in search of welcoming hospitality spaces. The rationale for producing the two national guides was given as follows, namely "to bring useful information to the notice of all those who are planning holidays" (South African Institute of Race Relations, 1968: 1). The geographical distribution of commercial hotel facilities available to Africans was mapped using the 1968 national guidebook. The spatial distribution of hotels that would accommodate African visitors is provided on Figure 1.

Several points must be noted. First, the national total of hotels for Africans was only 27 establishments, a confirmation of the minimal infrastructure available for African travellers. Second, the largest number of hotels for Africans existed in coastal centres (17 in total) with eight establishments in Durban and its environs and three hotels in or around the city of Cape Town. Three, most

striking is the limited supply of hotel accommodation services across large swathes of the interior of the country. During the mid-1960s Johannesburg, South Africa's largest city, had 124 accommodation suppliers with a total available capacity of 7718 bedrooms all for use only by White patrons – domestic or international visitors. By contrast the city had only three (very small) hotels that accommodated Africans. In Pretoria, South Africa's capital city, there were no hotel facilities available for Africans. Likewise, in other major towns on the Witwatersrand towns – Benoni, Krugersdorp, Germiston, Boksburg – no facilities existed to supply accommodation to African travellers. In the northern Transvaal once again no facilities for Africans in Pietersburg, and none along the major transport artery from Johannesburg to the Kruger National Park. In the Eastern Transvaal towns of Middelburg, Nelspruit or White River there existed no hotel facilities. Most of the towns in the interior of South Africa offered minimal or no hospitality services for Africans.

CONCLUSION

Over the past decade significant progress has been made concerning research on cities as tourism destinations (Van der Borg, 2022; Page and Duignan, 2023). At the cutting edge of much contemporary scholarship are issues around the politicization of urban tourism and the growth of anti-tourism movements associated with overtourism. One outcome has been the growing calls for policy-makers to either set limits to the numbers of visitors travelling to certain tourism destinations or for enacting interventions to block particular types of tourism.

It is within this context that this article contributes an historical perspective to these debates around the mitigation and containment of urban tourism under circumstances which surround overtourism (Dodds and Butler, 2019a). In the case of South Africa overtourism was not the trigger for the introduction of policies of urban tourism restraint. The impetus emerged from longstanding policies of racial segregation which sought to limit severely the travel mobilities of Black South Africans into the country's major cities. Policy implementation involved the regime of pass laws, requirements for visitor permits, and by the creation of an inhospitable environment for (Black) travellers with racial restrictions on the provision of accommodation services. Yet during the apartheid period these constraints on black mobilities and tourism flows occurred at the same time as initiatives were in place to energetically foster the domestic tourist flows of White travellers and of international tourists into South Africa's cities. The particular historical form of urban tourism restraints introduced in South Africa was part of the making of racialized landscapes of tourism. The dismantlement of this apparatus of urban tourism restraints occurred only in the closing years of apartheid and the transition of the country to democratic rule in 1994.

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DRIVING FACTORS TO SELF-MARGINALITY BY IDENTITY EROSION WITHIN ROMANIAN GEOGRAPHICAL HIGHER EDUCATION

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Abstract: The landscape of Geography within Romanian Higher Education might be at a crossroad. This is due to the over-focus on scientometric evaluations and the lack of tradition coupled to international research. In this context, we aim to highlight the role of Romanian geographers in the decline of their societal relevance, which is partly driven by an erosion of their internal identity. We identify the key factors contributing to Geography's marginalization within the Romanian academic framework and societal interests. Our analysis reveals a fragmentation of Geography as a discipline and scientific field, driven by centrifugal forces and a neglect of its foundational practices as parts of political influences.

Key words: Higher Education, Geography, Identity Erostion, Marginalisation

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INTRODUCTION

Our presentation for the Romanian Human Geography reveals another page of the "permanent identity crisis" unfolding in Geography (Peet, 1998). Outside of the aggression of other related fields and the excessive desire to increase the Geography' share to interdisciplinary approach, geographers themselves make a huge contribution to the marginality of Geography in Romania. Analysing this last issue we present the main driving forces that push Geography to the periphery of Romanian fields of study and interests in society. In such a context, we search to depict what is the "contribution" of the Romanian geographers to the deterioration of their role in society, by internal identity erosion of Geography. To do this we approach Geography mainly through its human direction, although the complex situation in Romania makes a geographer be identified through its multi-faced approaches (environment, physical Geography, GIS, etc.). Setting the scene of discussion, we unfold the

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self-marginality of Romanian Geography in three direction: research, education and practical involvement, contextualizing the many challenges that weigh on the fields development and its actors.

A QUIET EVOLUTION AND A SMALL ROLLER-COASTER

The trajectory of Romanian Geography was kind of a roller-coaster. From the height of first theoretical courses taught by Simion Mehedinți at the beginning of the 20th century (Sandru and Cucu, 1966) and the political school developed in the interwar period, Geography fell to mostly a support for national agenda in the communist period. After that, Geography recorded another boom, at least from the perspective of the number of students pursuing this field, while more recently, Geography could be treated as a marginal field enclosed into the Geosciences imposed directions of former Geography graduates. Overall, Geography advanced from a descriptive-explanatory discipline to a systemic view discipline that integrated the interaction of geospheres (Ianoş et al., 2018), while, with few exceptions, only after the year 2010 glimpses of international research started to materialize.

The roller-coaster evolution was due to geopolitical challenges and the political atmosphere shaping people and spaces. In the case of geopolitical influence on Romanian Geography, the field moulded as a response to the first World War, when the good contacts with German researchers stopped. Back-then in the inter-war period, Geography was central to the formation of national identity, education and support towards political formation of the newly established Romanian state (Vâlsan, 1921). Consequently, Romanian Geographers leant towards French Geography and its ideas about how borders and territories are shaped through political manoeuvres. This influence rendered a preference for trying to emulate the French culture, an aspect visible in the formation of many geographers until late 1990s and practised through bilingual journals (Romanian and French).

Another geopolitical force intervened during the communist era when the Russian perspective on environment and the descriptive productions in economy shaped the formation of researchers. In the first case, it was an attempt to theorize the environment as a mix of interactions between the human production and the geomorphological characteristics (Martiniuc and Băcăoanu, 1964; Rădulescu, 1972). Secondly, this approach translated into a pressure of reporting the economic production in a spatial perspective (Popovici et al., 1980). This made Geography as a means to propel national aspirations of development, mostly shaping the depiction of country characteristics. Because of these, the period was abundant with monographs and atlases describing at various scales geographical features starting with geomorphology, climate, continuing with demographics and urban or rural descriptive features and ending either with tourism or environment (see, as example, The Monograph of Romania People's Republic – published under coordination of Russian geographers in 1960, and the Atlas of Socialist Republic of Romania from 1972-1979).

From a political point of view, Geography was shaped according to Mehedinți's disciples (Ianoş et al., 2018). These seniors focused on parts of the systemic view thinking envisioned by their master and enhanced geomorphology at Cluj-Napoca, human Geography at Iaşi or a mix of approaches at Bucharest. The research that stemmed from this attempt to develop specific teaching

regionalized the field and collaboration as there was under a tacit agreement on the division of interests and their spatial coverages (Simandan, 2002). Furthermore it emphasised a trend towards analysing Geography under a regional perspective with national flavours. This fragmentation maintained over the years, and the relationships among researchers appeared to be not only spatially disrupted, but political shaped, becoming more fragmented after 1990 when geographic teaching and research bloomed in other Romanian cities. Under this challenge Romanian Geography emphasised the importance of local professors instead of placing the focus on debates and critical intervention in geographical ideas.

The post-communist period involved a powerful shock at first. It was a shock caused by the lack of resources (financing, connections, research sources, etc.). This shock was amplified during the linguistic transition of publishing in English instead of French. Furthermore, the publications focus meant changing the local perspective to the theoretical and sophistical research of the Anglo-American research engine.

During the first years of the 90's, several Romanian geographers capitalized the former contact with David Turnock (University of Leicester), who organized the last bilateral geographical colloquium British-Romanian in September 1993 (Turnock, 1993), and the opportunities offered by European TEMPUS-PHARE Program, after 1995. In this context it emerged the EU-Phare TEMPUS JEP 11070/96 – "Geography Initiative on Tourism in Higher Education", with the participation of University College Chichester and Babeş-Bolyai University (Bodocan, 2019). Other contacts with several British researchers emphasised the critical direction in Geography, only later on reached the Romanian geographical research. Back then, the research remained focused on empirical studies, with some attempts trying to develop ideas in connection with more and more contacts with German and English geographers. Despite the many limitations of the communist period, a trend appeared toward urban and territorial system planning (Ianoș, 1987) which continued until 2000, and gradually started to connect with Anglo-American research perspectives.

It was a period about which Simandan (2002) suggested that Romanian Geography seemed backward and dominated by Bohemian methodologies (Simandan, 2005). Indeed, at the beginning of the 21st century, the conversation with the international arena, and especially Anglo-American community limited to small projects in which Romanian geographers mainly supported fellow international peers with data and information about the socio-economic transformation that took place back then. While many papers were published on various contexts related to Romania in international journals, few included Romanian authors. Also, small European projects accentuated the regionalisation of Geography as Cluj-Napoca and Timişoara focused on relations with German and Scandinavian researchers, while Iaşi, Bucharest or Craiova had stronger connections with French researchers. That is why, at the time, Geography appeared to follow societal needs with targeted analysis, plans and reports disseminated in mainly national journals and strategies, but related with the new European Union planning and political perspectives.

Romania could not connect to the international research arena as long it lacked resources. Only when the National Research Agency offered access to some international publications after 2005, Romanian Geographers could observe the topics of interest and the modern scientific approach within the

discipline. Since then, Romanian Geography entered within the conversation realms by publishing papers in renowned journals and sometimes being involved in European research projects or Fulbright scholarships. As such, from a publishing perspective Romanian Geography was not backward any more. Plenty of papers appeared in top journals, yet the publication flow showed a tendency towards multidisciplinary or area study journals and journals with a very specialized focus in climatology, geomorphology, GIS or environment studies and in general other connecting spheres than the sphere of Human Geography. The situation expanded as a consequence of marginality created from within Geography as we detail next.

DRIVERS OF SELF-MARGINALITY

In this section we present what are the main driving factors to self-marginality and identity erosion within the Romanian Geography. We frame self-marginality between the visible results produced by geographers themselves through research, teaching and social responsibility related actions and non-actions. Geographers' actions unfolds through destructive consequences for their discipline as they grow attached by other sciences. This centrifugal move saps into the geographical potential to develop new own concepts and methods for their science, preferring to circulate "invasive" tools for geographical science and discipline. Such a development has an important role to diminish the capability of Geography as a fully-fledged science and discipline. Regarding non-action there are two aspects: one represented by the reactive and non-proactive behaviour vis-à-vis of knowledge production on the spatial dynamics, and another one built on attempts to encourage the assimilation of the new concepts and methods coming exclusively by other sciences, by a large imitation process.

Identity erosion within the Romanian Geography is explained by the contradiction between an important number of geographers and their obscure presence as a prestigious corpus in society. If previously, inclusively the communist period, the geographers were well appreciated by their works and performance in the teaching process and required analyses, now they are regularly removed from different decision bodies at various institutional levels. Trying to find a response to decay between number and visibility, we observe a great gulf among the Geography' decision-makers at different levels and the majority of geographers. The lack or superficial knowledge of human resources in Geography, overlapped on their arrogant positions exaggerating scientometric performances at individual level, accentuates transforming trends from good geographers into civil servants, limiting their creativity in science and higher education teaching. The implementation of a destructive vision to impose promotion criteria, for example, from top to down, without an evaluation of the teaching staff system in Geography, their role in society and their professorship correspondence with other social science disciplines, is just an internal identity erosion of Geography and its self-marginality, too.

ARENA OF STRUGGLES

Table 1 highlights the main factors that cripple Geography. There are two main categories: a) Factors connected with the weak position of Geography in the creation and functioning of institutional framework of higher education at central and regional levels, and b) Factors connected with the discriminatory

trends promoted in the eligibility of the Ministry Education councils' members, and of the research projects managers. Because for the readers it is not difficult to understand why Romanian geographical higher education records a dimmed perspective, our discussion overviews the factors in their interrelations with each other making references to other international similar cases.

Table 1. Driving factors of marginality

Item	Driving factor group	Driving factors (a selection)
1.	Factors related to the weak position of Geography in the design and operation of the higher education institutional framework at central and regional levels	Weak capacity to use Geography for knowledge production and development within national institutions. For example, establishing planning directions is mainly reserved to architects or economists despite their poor spatial understanding of space leading to many complicated situations.
		Geographical concepts are better used in discourse and narrative by other disciplines. Therefore, Geography is unable to demonstrate its efficiency in research and higher education through its own core concepts and ideas.
		Chaotic reactions of geographers to changes promoted by different national councils that focus on hierarchies and less on quality.
		Lack of a strong geographical task force to catalyse the geographers' proposals for defining a realistic vision on the national role of Geography.
		Inertia of professional, scientific, and civic geographical associations that do not work on developing synergies and coherence towards the improvement of the institutional framework.
2.	Factors related to the discriminatory trends promoted in the eligibility of the members of the councils within the Ministry of Education, and of the research project managers	The selection of the members of the national council commissions based only on their research activity explains some paradoxes.
		The stability of the same core researchers in the Committee creates conditions to change the criteria and standards, from one mandate to another, in correlation with their own new scientometric indicators. This creates high unpredictability and frustration for the next candidates.
		Criteria and standards are used by the Ministry of Research as eligibility instruments for project managers, eliminating researchers with good results and good ideas but not meeting the geoscience standards promoted by the ministry.
		Evaluation of research activity based exclusively on the Q1 and Q2 journals, and not on the ideas expressed in the published articles creates a feeling of giving up deep reflection topics and moving towards grievance research.

Romanian Geography lacks the contact with international disciplinary history. This is in line to what Johnston (2015) notice in the case of Anglo-American departments, but from a different perspective. The difference stems from the ignorance on local geographical tradition and the pressure rendered in

the years of communism towards hard sciences in the detriment of human and economic approaches that only had to emphasise the ideology successes. In other words, political fluctuations transferred on Geography evolution after 1990, impacting on the lack of theoretical focus in research. Unconnected to geographical roots, local or international, Romanian Geography appears as a mix of geomorphology, climatology, ecology and other branches of Geography usually focused on quantitative analyses or encyclopaedic knowledge, glued together with technical prowess (GIS and Remote Sensing). That is why Geography appears as an ordeal for many students (Simandan, 2002), radical and critical interventions being cast aside for not having a quantitative approach.

A major problem of Romanian identity erosion in Geography stems from the poor use of geographical concepts. Instead of a global focus correlative with other scale analysis, most of Romanian geographers tend to downplay their concepts and methods and promote alternatives from other disciplines with indistinct connection to the geographical theories and practices. As in other marginal locations (Saguin et al., 2022), Geography in Romania remains obscure for its utility. Geography is overshadowed by either neoliberal economics or planning fields (read architecture) on one side or polytechnic faculties where distant geographical approaches are integrated in technical topics. Also, because of the traditional emphasise in the high-school curricula there is a gap between the theory and the perceived knowledge, descriptive approaches being preferred.

The increasing complexity and refinement of research coupled with a reductionist perspective of science (Pitman, 2005) made geographers to pursue other disciplines and departments. The pressure of quantitative and positivist requirements made Romanian geographers to resemble more to an economist, sociologist, urbanist, demographer, engineer, etc. based on their research. It is like they forgot to be geographers and deepen the inquiry through a geographical holistic and spatial view anchored in social theory. Such situations allowed researchers from other disciplines to record groundbreaking successes in top Geography journals. If one looks in such journals (Antipode, Geoforum, Political Geography), it may notice that Romanian sociologists publish analyses and frame theory in a manner similar to Western Geography unlike many Romanian Geographers who tend to focus on case studies and area studies in multi-disciplinary journals. This occurs as the anthropogeographic perspective on the space is better coupled with a trend towards critical theory, yet supported through drops of - what we notice from the margins - grievance perspectives, imaginaries or specific hegemonies (Bański and Ferenc, 2013; Lawhon, 2013; Bekaroğlu and Yazan, 2023).

Other issues with human Geography in Romania stemmed from the adoption of neo-liberal university values that pursue a meritocratic approach based on bland numbers and less on quality (Ianoş, 2017; Gavriş, 2020; Vîiu and Păunescu, 2021). Under Bologna transformation framework STEM disciplines rendered a more favourable position in rankings and financing, limiting the support for Social Sciences and Humanities disciplines. With no surprise it was the clear mirror of the aggravating situation presented in US "when higher education - public and private - adopts a specialization whose purpose is to attend to a certain market-friendly politics" (Bernardes et al., 2017; 954). The trend surfaced elsewhere in international arena (Head and Rutherfurd, 2022; Liu et al., 2022; Saguin et al., 2022), with Geography slowly appearing to

lose its identity. In such regards, the call for grants favoured topics with a bias on STEM sciences or key fields like energy, material science, space science from a military perspective, agriculture or biology. Consequently the research orientation in Geography skewed towards topics favouring a physical, ecological or land use perspective that drove forward technical approaches, minimizing theoretical research. The focus on specific directions and funding made geographers to be locked in priorities that reflect national or European strategies that in the end cripple the discipline and promote multidisciplinary directions where Geography is buried under the political influence or the prestige of other disciplines.

In an environment dominated by the uncritical adoption of external values (Patapievici, 2014), Romanian universities adopted a mix of audit and accountability procedures (Gavriş, 2020). In the case of Geography such procedures showed their effects in the evaluation and promotion metrics that are powerfully connected to the view that Geography belongs, or in fact is, to what most members of CNACTDU commission call "Geosciences" and geographers should accept the transition to become geoscientists. The problem grew as the Earth Science commission comprised mostly former Geography graduates, specialized in the Physical Geography branches, closely connected to geology, climatology, palaeontology, or remote sensing. They argued that Geography should be replaced by Geosciences in research, a direction that determined Ministry of Education to replace Geography in schools with more societal appropriate disciplines (environmental disciplines for example). Furthermore, under-representation of Human Geography, created another paradox: doctoral theses and habilitation are evaluated by geologists or climatologist, hydrologists and similar fields of research.

Talking about criteria, another point of disrupting Geography research and education relates to promotion criteria. Specifically, a Geographer has to obtain, as a director, minimum two national research projects of at least 80,000 Euros to become professor! The alternative is to be member of several international projects or a leader in such a project, a situation usually developed through social capital. Because of grants primacy in Geography, lower-tier researchers/professors cannot compete to other colleagues from other disciples. For example, in other Social Sciences from Romania, colleagues have opportunities to advance on very loose criteria or at least criteria that shape better the professorship status alongside the research. One analysis made by a colleague in discussion list mentioned that out of 15 research fields from the University of Bucharest, only in Geography there is the necessary criterion of grant director. On the other side, the time of publishing in Physical Geography and related disciplines is shorter (few months) in comparison to Human Geography where for a Romanian researcher it usually takes 2-3 years to advance the theoretical field in middle tiered journals. All these are parts of a neo-liberal conception that efficiency, metrics and grants might build up the strengths of geographies, while in fact slowly cripple the science. It is what Lahiri-Dutt (2019, 859) present about the neo-liberal institutionalizing of metrics that marginalize "geographers who pose critical questions", while "those who are perceived as weak in a masculine research environment are seen as dispensable".

LESSONS FOR GEOGRAPHY TEACHING

The factors of self-marginality in Romanian Geography obviously diffused over Geography teaching as well. When someone in Romania is asked about

Geography, the trend is to display a general knowledge about the physical and political characteristics of the country or the inquired local space. This has a lot to do with the way Geography teaching emphasises local, regional and national characteristics. Because the focus of most graduates is to become teachers, faculties used to drive forward this kind of education.

The safe opportunities of becoming a teacher and the illusions of easy earnings through tourism drove many students to enroll in Geography faculties. In the 2000s national statistics recorded high numbers of students enrolled in Geography (about 10,000, with a maximum of 19,000 in 2010), this being the second largest number of enrolled students after China. This explosive boom from less than 100 students in 1989 propelled Geography as one of the most popular fields in the first two decades of the transition. The situation was a paradox: the increase of geographers' number was in contradiction with the visibility of Geography as a science and discipline.

After the booming years of 2000s, Geography teaching had to adapt to market pressure. The curricula changed little, instead specializations like GIS, Tourism Geography or Territorial Planning gave a second wind to human geographers who had to find solutions for preserving their discipline.

The climate changed even more after 2010 as there were too many students in Geography faculties and few teaching jobs given that the demographic dynamics shifted towards negative trends alongside migration. This miss-match could be observed also from the focus on Geography Olympiads where Romanian is usually in the top three nations. Unlike Singapore, another top contender in the Geography Olympiad, the Romanian students winning such a competition, usually do not pursue an academic career and tend to not apply Geography in their jobs, a situation echoing that Geography education is disconnected on Geography research and the Geography of education (Butt, 2019; Puttick, 2022). Such a situation built on how Romanian Geography position in research, education and society was perceived - a classical discipline, without a real research core field that tends to emphasize a preference towards memorizing mountains, rivers, countries and cities.

Romanian Geography curriculum comprises a mix of disciplines. Students have to learn in the same year (3rd as an example) compulsory disciplines (Physical Geography of Romania, Geography of Continents, Environment Geography, Human Geography of Romania and several more topics) followed by a few specialization disciplines, all these targeting the development of school teachers enhanced with a general geographical knowledge. This is similar with what Simandan (2002) described more than 20 years ago, just that now students have to confront almost to the same curricula, but in three years. In general, geographic knowledge targets a general preparation without a focus on critical thinking, mainly driven by encyclopaedic and descriptive knowledge coupled with a pursue towards superlatives, spectacular and a basic gaze on the geographic components. Such approaches lead students to equip themselves with a plethora of software and instructions required by the physical, regional and environmental teaching branches of Romanian geographical departments as alternatives to the overwhelming amount of information, but missing critical insights about the use of technology in Geography.

Fortunately, students have the option to select some minor topics among which Volunteership also plays its role. Because of volunteership and research

centres, community engagement is now more visible especially in the environmental direction of Human Geography, although it is driven from geosciences perspectives. Also, several professors acknowledged the issues of mainly preparing teachers and conduct open research centres where students can expand their education, skills and perspectives through research.

Another challenge of the Romanian teaching dynamics in Geography relates to how professorship is mostly associated with a full researcher norm, despite the teaching workload, many times overburdened with administrative chores. Consequently, teaching service is considered marginal in evaluations. The race for grants makes some colleagues to prioritize administrative requirements of grants at the expense of teaching hours. Given the institutional pressure towards professors to publish internationally, students remain stuck in old manuals, while professors rarely publish Geography books in Romanian. With professors caught in the race for grants and survival in academia, there is also the challenge of consecutive deadlines that diminishes the time for reflection and advancement of pedagogy or increase of involvement in theoretical endeavours.

Simandan (2002) emphasises that place marks the evolution of a 'good geographer'. Such is the evolution of Romanian geographical discipline in higher education. Powerfully influenced by the early 20th century tradition, Romanian Geography remains anchored into the words of what is considered one of the central figures of the discipline, George Vâlsan: "Do not forget that homeland and homeland love are simple insipid abstraction if you have not gone alone to become brother with the land and the people that you belong" (figure 1). This idea is representative for the evolution of geographical thought in Romania and its local focus. It is a local based perspective, one that attempts to build mainly teachers and national researchers, instead of shaping and infusing internationally driven ideas and contexts. This comes at least from the perspective of non-Human Geography approaches, which has captured the teaching and research. Specifically, to develop other strands of research, human or environmental, one still has to learn Geomorphology and Physical Geography, supplemented with the Geography of Romania. Such an approach results from the way faculties of Geography are defined as hubs for preparing teachers and less for developing skills applicable regardless of conditions.
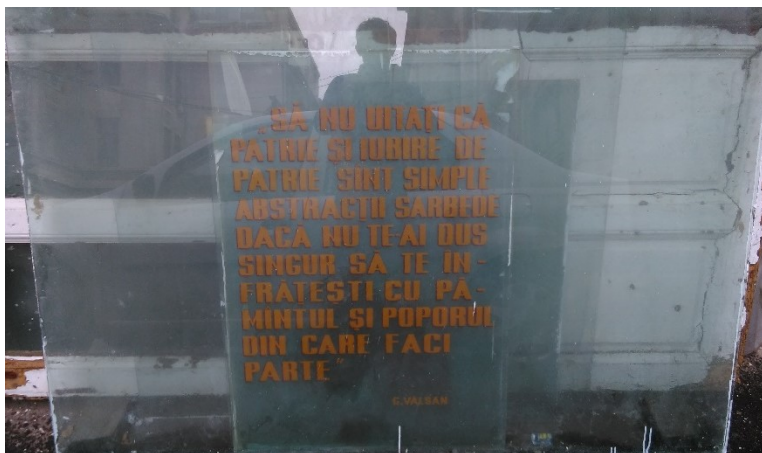

Figure 1. George Vîlsan quotation thrown in the courtyard (Faculty of Geography, Bucharest)
(Source: Cezar Buterez)

Representative for how Geography decided to steer its direction was the fact that Vâlsan quotation, carved and displayed in one of the main rooms from the Faculty of Geography in Bucharest, was thrown away and considered garbage. Nowadays, in place of the placard, technology gadgets and wires shape the minds of professors and students alike. This technological impulse reflects in the large interest of acquiring GIS and remote sensing skills shaping a procedural learning (Simandan, 2013). Unfortunately, critical reflection and humanistic perspectives on how Geography evolves are usually disregarded. For example, the annual students' symposium from Bucharest (started in 1990s) has a 100% percent top places occupied by papers in which GIS or environmental techniques support the analyses. This might be a consequence of siliconization of urban Romanian (McElroy, 2020) in the '90s and the influence of the Environment Science programme that existed in the same period within the Bucharest Faculty of Geography.

The factors described throughout this paper furthermore lead to a fragile position of Geography in schools. With the advent of digitisation and market friendly politics promoting specific disciplines, Geography seems futile. It is the case of recent plans of national education bodies that restarted initiatives through which Geography role should be diminished from teaching and replaced by more "actual" disciplines. Unfortunately, this trend is the consequence of how Geography representatives (leaders from Faculty of Geography in Bucharest and Institute of Geography of the Romanian Academy) describe the field: Geography is a natural science / exact science.

ALTERNATIVE CONCLUSION

The same phenomena of self-marginality, reflected here for Romanian Geography, marks the former socialist countries, which have embraced similar standards for Human Geography by using exclusively some of the research criteria offered by Clarivate Analytics. Romanian Geography has about 75% physical geographers and 25% human geographers, a structure inherited and kept from the communist period. Consequently, Romanian Human Geography is included in the group of Earth Sciences, having the criteria used for Geology, Climatology, Geophysics, Geomorphology, Biogeography, and Environmental sciences. Between all these sciences there are huge differences linked with the publication possibilities and the Article Influence Score (AIS) values (a unique indicator selected by the Earth Sciences Commission). This explains why among full professors and assistant-professors in Human Geography, at the national level, only five of them reach just minimal standards.

The main challenge for Geography is how could be loved by geographers! The source of this challenge is the reality that the present-day preoccupations of geographers is to help more other fields and less their own science. Looking both in a national and international context, we conclude that there are enough reasons for concern in Geography:

- as a field:
– diminishing of Geography presence in all curricula regardless of education cycle;
– removal of Geography from the national tests and baccalaureate;
– a lower presence in schools.
- as a science:

–   accentuating the "aggressions" of other disciplines;
–   weak interest for Geographical revival;
–   "Sirens' songs" emerging from other scientific approaches lead geographers to pursue other fields of research;
–   the importance of technical approaches coupled with the core thinking that Geography is an Earth Science.
•   as societal presence
–   winning research projects might be considered an accident
–   low involvement in local and regional communities
–   fewer publications in Romanian.

Looking to the IGU (International Geography Union) reports and their analyses, alongside other international report, geographical Higher Education appears to move towards consolidation. But, carefully analysing the dynamics of initial geographical concepts (region, geosystem, cultural landscape) and methods (including maps), it results a single possible conclusion: there is a dissolution of Geography as a discipline and science, due to centrifugal trends and neglect of the solidity of its own methodological tools.

Aknowlegments

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MODEL OF ADMINISTRATIVE-TERRITORIAL ORGANISATION USING THE CONCEPT OF GEOGRAPHICAL AXIS. CASE STUDY: SOMEŞUL MARE HYDROGRAPHICAL AXIS

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Abstract: The social-economic need for reorganisation of Romania's territory serves as the main purpose in building a model of administrative-territorial organization based on a geographical axis, which can be very useful in understanding and managing regional resources and development more effectively. In the case of the Someşul Mare hydrographical axis, how the localities along this axis develop and interact is investigated. At the level of Bistriţa-Năsăud county, the design of the UAT (administrative-territorial unit) Someşul Mare, which includes the following UATs, is analyzed Şanţ, Rodna, Maieru, Anieş, Sângeorz-Băi, Iva Mică, Feldru, Nepos, Poderei, Rebrişoara, Năsăud, Salva, Nimigea, Chiuza, Beclean. The merger of 12 UATs into a single UAT called Someşul Mare with the centre at Beclean. Due to its economic expansion and geographical position, the city has been chosen as the centre and pole of the new U.A.T within the county. National Road 17 (DN 17) and County Route 172 ensure the continuity and functionality of the UAT axis Someşul Mare.

Key words: UAT Someşul Mare, Geographical Axis, Model of administrative-territorial organisation, Bistriţa-Năsăud County, Romania

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INTRODUCTION

The urban area and the rural zone are organic components of the regional system. They are interdependent, integrated, and complementary (Liu et al., 2023). The complex urban-rural relationship refers to the symbiotic interaction between urban and rural areas that affect each system. It is the most basic economic and social relationship in the development of human society, and it is

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also an important relation that must be dealt with in regional development and political organization (Liu et al., 2023).

Urban-rural interaction is manifested in the flow of material, capital, personnel, information, and technology resources between urban and rural areas (Liu et al., 2023). The geographical axis model shows Urban-rural interaction efficiently.

The development of a model of territorial reorganization based on the concept of geographical axis is being investigated. Proposed model: U.A.T. Someşul Mare. The geographical axis is defined as a "line of spatio-temporal shape, a line that allows in a temporo-spatial way, the diagnosis and geographical forecasting of a territory, a territory that can take different geometric conformations, and dimensions according to the capacity of component polarization" (Pop, 2003).

Grafting the territorial planning activity in practice, for example, within the axis, must respond to the elaboration of the main indicators in the development and geographical harmonization of the territory by (Pop, 2004): the study of natural, social and economic conditions. The geographical and social axis are concentrated and spread to and from the poles of development, the flows of population, goods, capital and information thus playing an important role in their development and dynamics (Pop, 2016).

Thus the hydrographical axis Someşul Mare is characterized as a geographical axis that meets the mentioned conditions and presents geographical continuity in the studied territorial area. Rivers are commonly used to define political boundaries, rivers can be used as a structure in territorial delimitation at the sub-national scale (Popelka and Smith, 2020).

The importance of the territorial organization along the contours of the river Someşul Mare is given by the relationship between the hydrological unit and the communities. Rivers connect people, places and other forms of life, inspiring and sustaining diverse cultural beliefs, values and ways of life. although the views emerging from socio-hydrology and the hydro-social cycle are based on different paradigms of knowledge, they are rooted in the basic idea that water systems - like rivers - and society co-evolve and emerge through continuous engagement in space and time (Anderson et al., 2019).

Ethnographic studies of common water systems and their communal water management institutions have also contributed to such understanding (Anderson et al., 2019).

The territorial reforms are based on the performance, administrative and organizational power of localities (Ebinger et al., 2019). It is important to note that this results from their organisational and resource capacity and their room for manoeuvre in terms of finance, policy, organisation, staffing, etc. On the other hand, they can solve local problems and influence social developments in the territory in the long term. This includes the ability to perform public tasks by improving quality, accessibility, legitimacy and efficiency (administrative strength) as well as to act as a strong carrier of public institutions (organizational strength) (Ebinger et al., 2019).

By outlining administrative-territorial units (UAT), the administrative performance and capacity of Someşul Mare increases.

METHODOLOGY

In the realization of the article, the geographical axis method is used, which fulfills material, energetic, informational and relational functions (Figure 1) The geographical axis method is used to investigate territorial tasks: settlements, administration, population and demography.

It outlines the model of a territorial administrative unit based on the hydrodiversity of the Someşul Mare River, which is characterized by human activities (forestry, agriculture, hydrographic planning, water supply, energy industry, fishing, recreation, etc.) carried out between settlements.
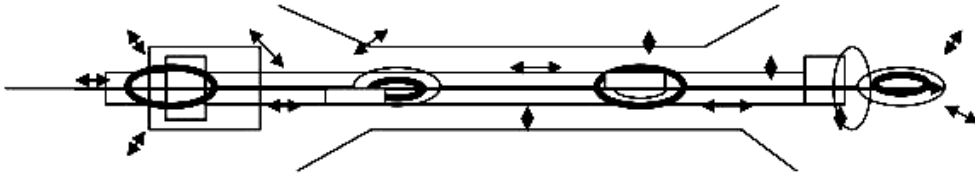
Figure 1. The composite model for spatial structures in the form of a geographic axis used in the structural realisation of the U.A.T. Someşul Mare (Pop, 2016, p. 286-287)

The geographical element where the geographical axis is built: is the river Someşul Mare.
• Urban centers: Beclean, Năsăud, Sângeorz-Băi;
• Towns and villages under the influence of urban poles;
• connecting road: DN 17, DJ 172;
• Social and economic activities between rural localities and urban centres. Beclean central pole.
Geographical space - administrative units – social and economic trades - communication routes (road, road transportation).

RESULTS

To provide a good organization the research results are structured as follows: I. Descriptive analysis of the Someşul Mare River and the territorial units crossed by the hydrological unit; II. UAT Someşul Mare.

I. Someşul Mare River

The Someşul Mare River springs from the Rodnei Mountains at an altitude of 840 m, having the geographical coordinates of 47◦ 30' 31" North latitude and 24◦ 59' 43" East longitude travels a distance of approximately 130 km, through the towns of Sângeorz-Băi, Năsăud and Beclean until it flows into Someş (Figure 2) (Vasile et al., 2024).

The Someşului Mare hydrographic basin is a part of the Someşului hydrographic basin, with an area of 15740 km², which, in turn, is part of the Someş-Tisa hydrographic basin. For the most part, the hydrographic basin of Someşului Mare covers the area of Bistriţa Năsăud County, but smaller areas are part of Cluj county, especially at the discharge into Someş (Vasile et al., 2024).

Figure 2. The hydrographic network of the Someşul Mare basin, localization of the hydrographic axis (Bâca and Onofreiu, 2016, p. 48)

b. Territorial-administrative (UAT) units crossed by the hydrological unit (Table 1, Figure 3).

Table 1. Analysis of the UAT crossed by the River Someşul Mare [1]

Name UAT NO	Area km²	% of county surface	Population		% of county population	Component localities
Şanţ (1)	264,44	4,93	3.247		1,1	Şanţ, Valea Mare
Rodna (2)	139,15	2,59	6.003		2,03	Rodna, Valea Vinului
Maieru (3)	149,15	2,78	7.579		2,56	Maieru, Anieş
Sângeorz-Băi (4)	144,02	2,69	10.931		3,69	Sângeorz -Băi, Cormaia, Valea Borcutului
Ilva Mică (5)	53,63	1,00	3.164		1,06	Ilva Mică
Feldru (6)	123,03	2,29	7.378		2,49	Feldru , Nepos
Rebrişoara (7)	147,86	2,76	4.209		1,42	Rebrişoara Gersa 1,Gersa 2 Poderei
Năsăud (8)	43,53	0,81	10.215		3,45	Năsăud, Liviu Rebreanu, Lupşa
Salva (9)	26,32	0,49	2.491		0,84	Salva
Nimigea (10)	99,12	1,85	5.434		1,84	Nimigea de Jos, Nimigea de Sus, Floreşti, Mintiu , Mititei , Mocod , Mogoşeni , Tăure
Chiuza (11)	43,91	0,81	2.067		0,69	Chiuza , Mireş , Piatra , Săsarm
Beclean (12)	58,6	1,09	11.260		3,8	Beclean,Coldău,Fig,Rusu de Jos
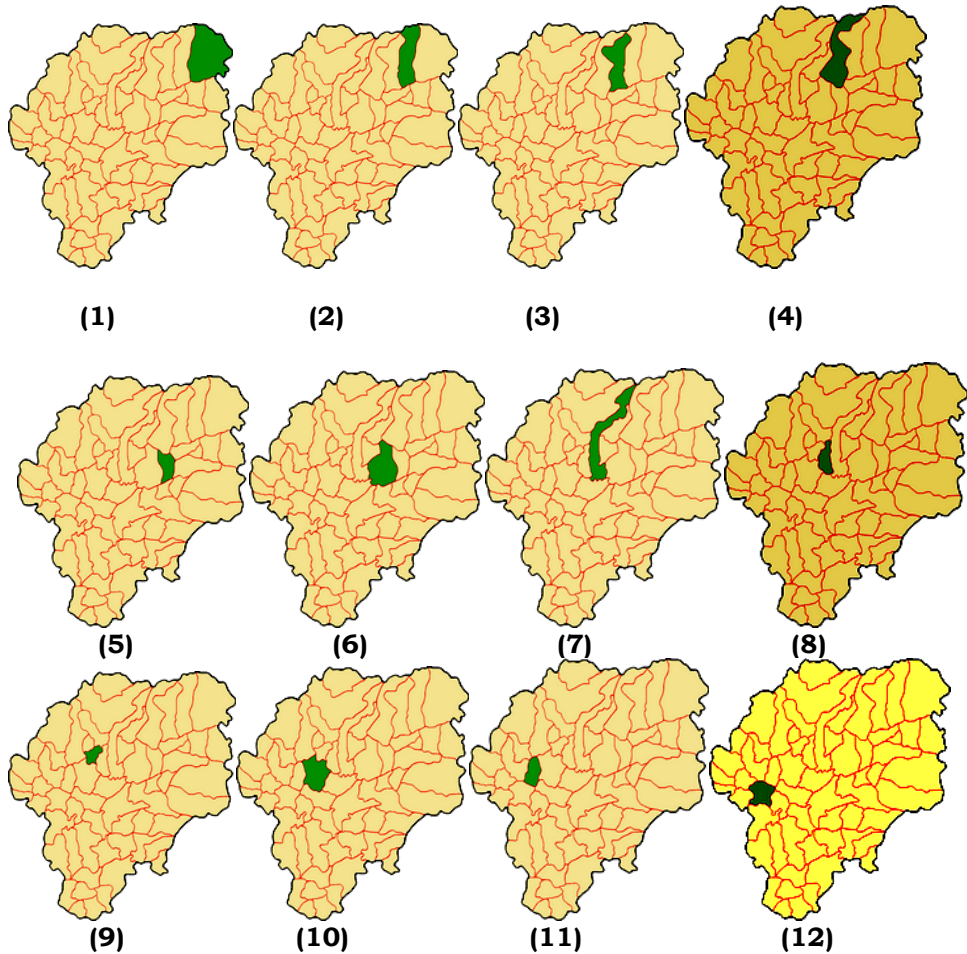
Figure 3. Situation of the administrative-territorial units before applying the axis module.

NO (4), (8) and (12) are urban poles, NO (4) is the centre for (1), (2), (3); No (8) centre of influence for (5), (6), (7); NO (12) pole for (9), (10), (11).

NO (12) is the proposed administrative centre for the new UAT.

II. Someșul Mare Territorial Administrative Unit (U.A.T. Someșul Mare)

Someșul Mare UAT unites 12 territorial administrative units (mentioned in Table 1), the administrative unit is crossed by the river named the UAT (hydrographic axis) and it is crossed by the national road 17 and county road 172, between the component localities there is social-economic exchange, urban centres therefore it is a geographical axis (Table 2).

The administrative reorganization model is carried out at the level of Bistriţa - Năsăud county, the political-administrative structure does not aim at the abolition of the county but at the economic efficiency of the administrative apparatus. The new structure respects law no. 290 of 29 November 2018 for the modification and completion of Law no. 2/1968 on the administrative

organization of the territory of Romania, Published in Official Monitor number 1052 of December 12, 2018.

Beclean becomes a municipality, the administrative centre of the Someşul Mare UAT thus creating a dynamic relationship between Bistriţa the centre of the county and Beclean the centre of the new UAT, this dynamic presents economic potential that allows the county to develop.

Table 2. The characterization of the new UAT [2]

Name UAT	Area km²	% of county surface	Population	% of county population	Number of pre-school, school, pre-university, university education establishments
Someşul Mare	1.292,76	24,09	73.978	24,97-25	24 + 1 university centre in Năsăud, UBB Extension, Faculty of Psychology and Educational Sciences

UAT Someşul Mare with a total of 25 educational units and Bistriţa with 40 units of which three university centres: (extensions UBB, UTCN, UMFST G.E. Palade Târgu Mureş) have the potential for academic development, a university axis (UAT Someşul Mare-Beclean - Bistriţa) on which to build a HUB of Innovation and Research that realises economic value and development for the county.

CONCLUSIONS

The creation of an administrative-territorial unit, such as Someşul Mare, can bring multiple social and economic advantages for Bistriţa-Năsăud County:

Regional Economic Development: strengthening resources and infrastructure can stimulate investment and economic development in the region. Job Creation: Infrastructure and development projects can generate new jobs, reducing local unemployment.

Access to European Funds: A larger administrative-territorial unit can have easier access to European funds for development projects. Improved Infrastructure: Strengthening resources can lead to the modernization of transport, energy and communications infrastructure, making it easier to access markets and attract investment.

Improved Public Services: A strengthened administration can deliver more efficient and higher quality public services such as education, health and transportation. Social Cohesion: Administrative consolidation can lead to better social cohesion and reduce disparities between communities.

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MILITARY AND POLITICAL TOURISM ATTRACTIONS IN THE CITY OF GDAŃSK

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Abstract: Military tourism is an atypical and recent form of tourism that is not sufficiently researched in the city of Gdańsk, northern Poland. However, the interest surrounding this phenomenon has been growing, which indicates the possibility of further development of military and political tourism in the area. The aim of this research is to present the major touristic attractions and to analyse the tourist traffic that play an important role in the overall development of military and political tourism in the city. The study is focusing on the following attractions: the Museum of the Second World War, Westerplatte and the European Solidarity Centre, as well as analysing the tourist flow.

Key words: military tourism, political tourism, museum, war, Poland, Gdańsk

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INTRODUCTION

Gdańsk, a city with over a thousand years of history, is known primarily for its historical values, as the center of processing and trade in amber products and the city of "Solidarity". But it is also the city where it is believed that the first

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shots starting World War II were fired. Almost eighty-five years have passed since the beginning of the Second World War (II WW) when on 1st September 1939 Nazi Germany invaded Poland followed by the official annexation of the Free City of Gdańsk the next day. Nowadays many people are interested in preserving and presenting the knowledge, lives, struggles and triumphs of those who lived in those times. The city of Gdańsk is one of the major attractions that tourists look for to experience the great emotional load of the past and to pay respects to those who are no longer among the living. Although many museums can be found in Gdańsk that actively contribute to the development of tourism in the area and its economic growth (Wojtowicz-Jankowska, 2017; Manikowska and Jakubowski, 2021), few of these attractions are part of the atypical form of military and political tourism.

Military tourism has developed into a broad trend of historical tourism (Hacker and Vining, 2021), history of wars and battles (Weaver, 2011; Venter, 2011; Zavarika, 2022), cultural and heritage tourism (Cooper, 2007; Zwigenberg, 2016; Venter, 2017; Mateus et al., 2023).

Due to historical events, there are many places in Poland that allow the development of military tourism (Jędrysiak and Mikos von Rohrscheidt, 2011). Defensive fortifications, bunkers, battlefields and numerous museums create numerous opportunities for the development of this relatively new sector of tourist services (Poczta, 2008; Lawin and Stasiak, 2009; Wendt, 2011). This is important due to the fact that tourism is one of the fastest growing sectors of the economy (Mikos von Rohrscheidt, 2011; Chylińska, 2013; Ilieş and Wendt, 2015; Herman et al., 2023, 2024), and military tourism fits well into the forms of sustainable tourism (Zaraś-Januszkiewicz et al., 2020; Hattingh and Crisp, 2023). What is also important, military tourism is becoming more and more popular among visitors. This increase in interest is largely due to the change in the modern understanding of tourism (Wendt, 2018, 2020), a large number of historical and military facilities and the creation of military-themed events that are becoming increasingly popular (Hrusovsky and Noeres, 2011). There is already a relatively large amount of scientific literature on Polish military and political tourism (Mikos von Rohrscheidt, 2009; Bończk, 2013; Zienkiewicz and Podciborski, 2019; Chylińska and Musiaka, 2020; Drobňák el al., 2022), but there are not many studies on northern Poland (Zienkiewicz et al., 2021). Previous studies mainly point to the niche importance and market share of such forms of tourism. They focus on the description of the values used in military tourism and their importance in history, education, local and regional development (Stach et al., 2014; Zgłobicki et al., 2016; Sadowski, 2016; Podciborski et al., 2023).

Military tourism covers a wide spectrum of values. Based on the literature (Kowalczyk, 2009; Stach, 2013), they include: historical military routes, fortification lines, military museums, individual military facilities, exhibitions and military collections. For obvious reasons, all the values indicated above are the result of historical events and political decisions, which leads to the conclusion that military tourism is related to cultural tourism, historical tourism and "political" tourism (Wendt et al., 2021; Mikhaylova et al., 2022). The latter can be described as an interest in learning about events/objects/museums in recent history that influence contemporary politics. There is nothing new in this statement, accounts of recent history and politics have a very rich literature (Friedman and Kenney, 2005; Lawson and Hobson, 2008). However, from the

point of view of the classification of tourism, it seems appropriate to point out differences in the field of military tourism between, for example, visiting the Wisłujście Fortress Museum (beginning of construction in the 15th century) and a stay at the European Solidarity Center (ECS, founded in 2007). "Solidarity" - a great Polish social movement (1980s), pacified by the army after the introduction of martial law in Poland. Similarly, the Polish military outpost at Westerplatte, in the former Free City, apart from the military material depot, had political significance for all parties involved in the realities of Gdańsk at that time, including primarily the Free City, the League of Nations, Germany and Poland (Bógdał-Brzezińska and Wendt, 2020).

The aim of the research undertaken is to confirm the increased interest in visiting selected facilities during free days in Poland (the so-called May long weekend); assessment of age and gender diversity of tourists and comparison of the attractiveness of three selected facilities in relation to their transport accessibility. The following hypotheses will be verified:

H1 long May weekend favors an increase in the number of visitors.

H2 military and political facilities are more popular with men than women.

H3 military facilities are more popular than ECS facilities.

H4 Greater tourist traffic is recorded in facilities with greater transport accessibility than in facilities that are more difficult to reach.

METHODS

The research methods and techniques used in this study had been selected to best fit the unique research problem and the subsequent scarcity of data sources (Wendt and Bógdał-Brzezińska, 2018). The methodology of the study included several stages.

Researching the project and selecting suitable attractions. This stage consisted of researching the subject of military / political tourism and identifying important attractions related to the city of Gdańsk.

Reviewing relevant literature and documents to aid in identifying the state of military / political tourism in the region. In order to determine the subject matter of the present article, an analysis of literature was undertaken in terms of issues related to military / political tourism and its development.

Collecting and analysing source data. The main obstacle of the research was obtaining information on museum resources as well as statistical data for monitoring the volume of tourist traffic. The information used in this article was gathered through field observations, photographs, interviews with visitors and direct contact with museum employees and staff, which proved to be a very valuable source of information.

Three tourist attractions in Gdańsk were selected to analyze tourist traffic and verify the research hypotheses. A classic military museum, the Museum of the Second World War (Machcewicz, 2019), the Westerplatte facilities, where there is a monument dedicated to the defenders of the Polish Transit Depot and the remains of the fortification system (military aspect), and on the other hand it is a place known for the outbreak of World War II (Samól et al., 2023) and the stay of Pope John Paul II and numerous international meetings of politicians on the anniversaries of the outbreak of the war, as well as a classic attraction with a political dimension - the European Solidarity Center (ECS).

The research was conducted for three weeks, before the long weekend in Poland (25/04/2024), during the long weekend (02/05) and after its end

(09/05). The long weekend is a specific period of free time in Poland resulting from two days off each year, which in Poland are May 1 (day off, Labor Day) and May 3 (Constitution Day). In 2024, two public holidays (01/05; 03/05) with free Saturdays (27/04; 04/05) and Sundays (28/04; 04/05) with three days of leave (29/04; 04/05; 30/04; 02/05) allow you to create a nine-day "long weekend" that can be used for rest or a tourist trip. The students conducted the research during two hours, through direct observation, in a way that allowed for comparison of results.

MILITARY MUSEUMS AND EUROPEAN SOLIDARITY CENTRE (ECS)

Military tourism is a segment of the tourism industry known to attract a large flow of visitors, influencing the way they view certain events from the past, as well as being repositories for knowledge and by preserving historical resources and memories for future generations. Military bases and facilities, former battlefields and war theatres, museums, exhibitions and memorials play a special role in social life due to their vast collections of military artefacts, models, equipment, archives, documents, photographs, etc. that hold educational and historical value.

This study has selected a few attractions that qualify as important facilities for the development of military and political tourism in the city of Gdańsk:

The Museum of the Second World War (Muzeum II Wojny Światowej w Gdańsku) was opened in 2016 and represents a grand addition to the northern waterfront of the city, at the confluence of the Radunia River and Motława River canals. The modern building of the museum takes up 23.000 square metres and the main exhibition, considered one of the most extensive in the world, covers almost 5.000 square metres and is located in the basement of the building. The exhibition traces the fate of Poland and its people during the world's greatest conflict, comprised of three narrative sectors: „The Road to War", „The Terror of War" and „The Long Shadow of War", further divided into eighteen sections arranged in chronical order.

The European Solidarity Centre (Europejskie Centrum Solidarności, ECS) is another important cultural building that was opened in 2014 and is situated in Śródmieście district, at Solidarity Square (Plac Solidarności) and in the vicinity of Gate No. 2 (Brama nr 2 Stoczni Gdańskiej) and the Three Crosses Monument, all related to the Solidarity Movement (Kołtan and Konarowska, 2014). The building resembles a massive, weathered hull of a ship docked near the legendary gate leading to the Gdansk Shipyard. The interior is reminiscent of a large hall with crane guiding structures and houses the main exhibition devoted to the history of Solidarność, the Polish Shipyard Trade Union, civil resistance movement and other movements that played key roles in the process of defeating communism in Poland and other Eastern European countries, which are all presented in an interactive manner. The European Solidarity Centre also contains a library with a reading room soring 100.000 volumes, a multimedia library, a multifunction room for 430 listeners, archives with the capacity to store over 40.000 files, a server room, research and science centre, education and training centre as well as creative workshop laboratories.

Westerplatte is perhaps the most famous peninsula in Poland located on the costal mouth of the Dead Vistula (Martwa Wisła), in Gdańsk harbour channel. It is the place of heroic resistance of the Polish garrison, a handful of soldiers who opposed the German invaders during the Battle of Westerplatte that began on 1st September 1939 and lasted until 7th September.

It had a significant impact on Polish morale, bringing unity and national pride to all who faced overwhelming odds. The resilience and bravery of the Polish soldiers displayed during the battle soon became a symbol of hope for the entire nation. This battle marks the official beginning of the Second World War.

RESULT AND DISCUSSION

The data presented in this study has been gathered during a period of three weeks, on certain days, which are 25th April, 2nd May and 9th May, however due to the considerable variations in the behaviour of individual tourists, weather conditions, holidays and the general scarcity of statistical data and reliable sources, the authors had to rely on studying the tourist flow, counting the number of visitors, as well as sorting and dividing them into age and gender groups. Eventually, enough data has been collected and processed so that graphs, tables comparisons and conclussions can be made with said data.

Table 1. The number of tourists that visited the military and political tourism attractions

Name of the attraction	Date	Total	Age			Genders	
			0-18 yrs.	19-65 yrs.	65+ yrs.	Female	Male
European Solidarity Centre	25.04	116	6	97	13	44	72
	02.05	127	18	82	27	59	68
	09.05	315	15	269	31	154	161
Museum of the Second World War	25.04	289	80	181	28	139	150
	02.05	264	57	176	31	152	112
	09.05	432	132	257	43	223	209
Westerplatte	25.04	135	53	77	5	56	79
	02.05	244	41	191	12	128	116
	09.05	519	264	238	17	265	254

Using the information presented in Table 1 the authors have constructed several graphs to aid in the visualisation of the tourist flow at each of the main attraction relevant to the subject of military and political tourism.

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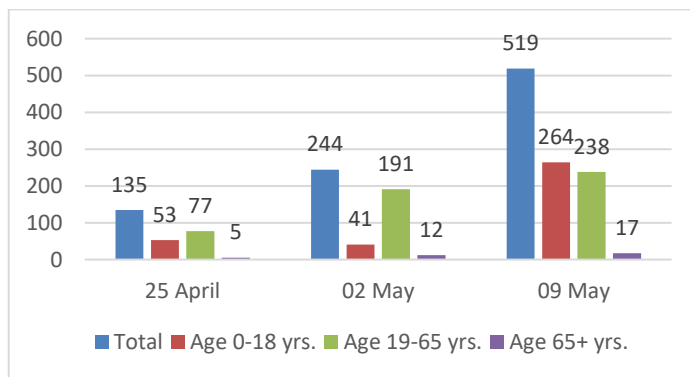
Figure 1. Number of visitors at the European Solidarity Centre
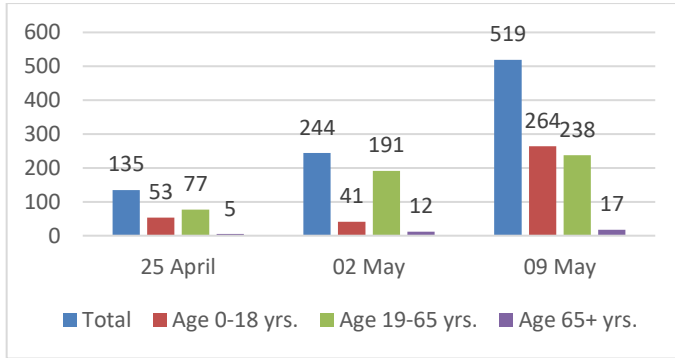
Figure 2. Number of visitors at the Museum of the Second World War
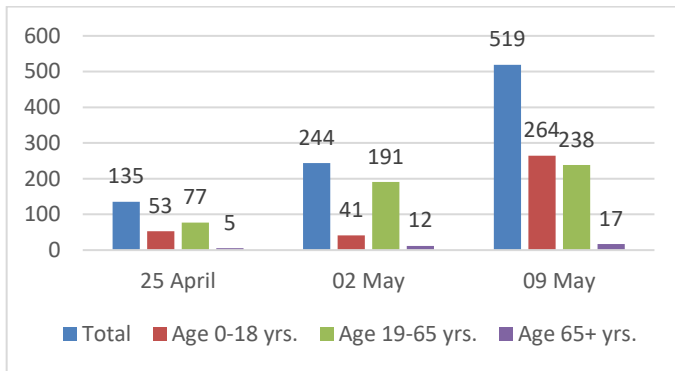
Figure 3. Number of visitors at Westerplatte

Studying the data from Figures 1-3 it can be concluded that the busiest day for all three attractions was 9th May, mostly because of fair weather suitable for tourism. Also, it can be observed that many visitors seen at all three of the locations are between the ages of 18 to 65, however the second highest number of visitors are part of the 0 to 18 age group, and the least visitors recorded are elderly of 65+ years.
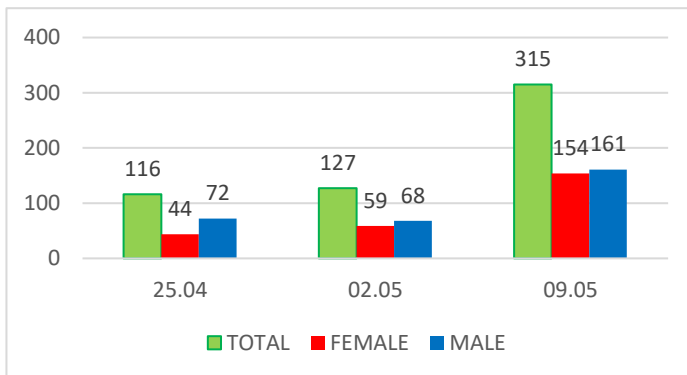
Figure 4. Visitors at the European Solidarity Centre
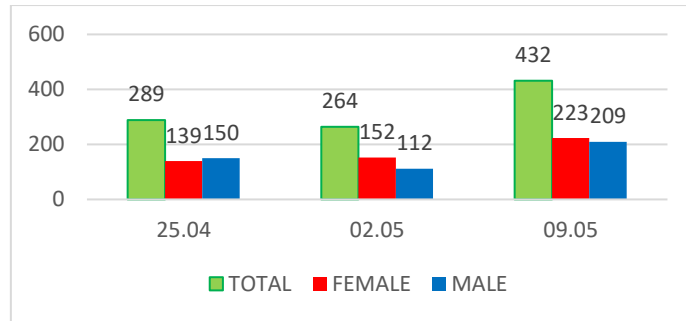
Figure 5. Visitors at the Museum of the Second World War
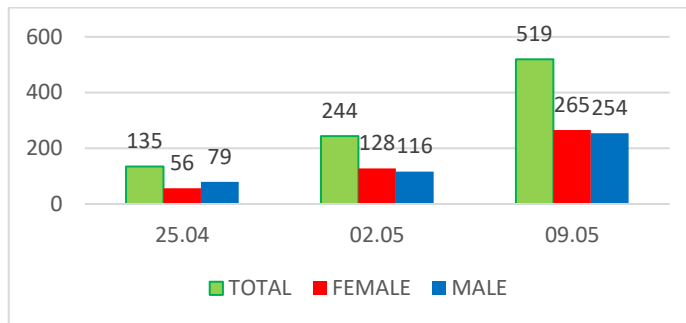
Figure 6. Visitors at Westerplatte

According to the analysis of the number of tourists, the May long weekend was not characterized by the highest tourist traffic. Before the long weekend, tourist traffic in the surveyed facilities was the lowest, during the weekend there was an increase in the number of tourists, but the largest number of people visiting selected attractions took place after the long weekend. This is probably the result of potential tourists deciding to go on a longer trip, most often abroad, in order to make the most of the long weekend. However, this explanation requires verification and additional research. Therefore, it can be said that H1 has been verified negatively.

According to the data represented by the graphs in Figures 4-6 the difference between the number of female visitors and male visitors at any of the attractions is not large, only a few dozen people. However, during 25th April the majority of visitors at any of the locations were males, perhaps caused by the not so favourable weather of that day, that is only a speculation and it could be the cause of other factors. Similar to the other set of data that sorted the number of visitors by age groups, it can be observed that the busiest day is once more 9th May, with the majority of visitors being female. Which negatively verifies H2.

However, another research hypothesis (H3) was positively verified. In total, the largest number of people visited the Museum of the Second World War (985), in second place was Westerplatte with a slightly smaller number of tourists (898), and in third place was the European Solidarity Center, which was visited by 558 people on the examined days and hours.

Analysing the complete set of data divided into different categories offers some valuable information on the tourist traffic and it's prefferences, as well as aiding in identifying the most popular military tourism destination in the city of Gdańsk. By far the most popular destination is the Museum of the Second World

War with over 985 visitors, but it is also a favourite among the adult population between the ages of 18 to 65 years. The next most visited attraction was Westerplatte with 898 tourists walking on the famous peninsula, fascinating many youngsters and adults alike. Surprisingly, the least visited location was the European Solidarity Centre with only 558 visitors crossing its threshold, but that does not mean it is not an important location, quite the opposite in fact.

The last hypothesis (H4), according to which higher tourist traffic is recorded in facilities with greater transport accessibility than in facilities that are more difficult to reach, was only partially positively verified. The Museum of the Second World War was the most popular and is located in the city center. However, the European Solidarity Center, located close to the Second World War Museum, had the lowest number of tourists in the period under study. In turn, Westerplatte, located in a place requiring a long commute from the center of Gdańsk, had a larger number of visitors than ECS located in the city center.

CONCLUSION

Military tourism is a segment of the tourist industry that is rapidly growing in the city of Gdańsk, due to its unique museums and significant historical locations with vast heritage and knowledge that create great potential to attract more tourists to the region. The main objective of the research conducted was to study, analyse and identify the possibility of further development of military and political tourism, as well as the increase and interests of the tourist flow to military destinations, often linked to great cultural and historical events, acts of heroism and other patriotic values.

The research undertaken allowed to identify the diversity of people visiting three selected military and political attractions in Gdańsk. The research objectives set in the work were also achieved. The most attractive one, assuming that the measure of attractiveness is the number of visitors in the period under study, is the WW2 Museum. There is no clear predominance of visitors based on gender, but there is a clear age difference among visitors to individual facilities. The study did not show any increased interest in visiting facilities during the long weekend. This is probably the result of tourists choosing other, whole-week destinations. Similarly, the hypothesis about the predominance of men among visitors to military facilities was negatively verified (H2). The greatest interest was in the Second World War Museum located in the center of the city, but the least popular was the ECS, located close to the Second World War Museum. In turn, Westerplatte, with relatively the most difficult transport accessibility among the three selected attractions, was visited by many more people than ECS, which partially positively confirms H4. However, the positive verification concerns the hypothesis of greater interest in military facilities than in the ECS presenting historical and political events.

The authors hope that this article and the statistics presented within can aid in understanding and expanding the potential increase of the military tourism phenomenon and contributing further to the development of the tourism industry in the city of Gdańsk.

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MUGABE'S POLICY LEGACIES ON URBAN POVERTY AND INFORMALITY IN HARARE, ZIMBABWE

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Abstract: Zimbabwe gained independence in 1980 and had Mugabe as its first black president. Thirty-seven years later, Mugabe was, atypically, ousted from office. There exist controversies around his thirty-seven-year term. This paper evaluates Mugabe's policy legacies on urban poverty and informality in the country's capital city, Harare. Desktop research was used to achieve the aim of the study. Key themes that emerged show that power and intolerance were the main factors behind Mugabe's policies and a key reason for the current levels of poverty and informality. Recommendations on urban management policies to address African urban poverty and informality were proposed.

Key words: urban poverty, urban informality, postcolonial, Mugabe, Zimbabwe

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INTRODUCTION

African cities are wedged in complex geopolitical circumstances owing to the colonial epoch and porous post-colonial structures. Current structures that mandate urban management imitate the colonial policies of inequality and

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segregation (Matamanda, 2020a, 2020b; Tendi, 2020; Makoni and Rogerson, 2023). Coupled with that, the power-mongering and 'life presidency' mentality of many African leaders worsen the situation as they [leaders] continue to alter policies in a way that favours their political pursuits while creating a legacy of dire magnitudes which is, unfortunately, faced by citizens (Tibaijuka, 2005; Onslow, 2017; Chipenda, 2020; Ndawana, 2018; Matamanda, 2020a, 2020b). Matamanda (2020a), for example, pins the urban situation in Zimbabwe on Mugabe, who he denounces for ignoring the urban well-being in his pursuit for political control in Zimbabwe's rural areas. Accordingly, "Mugabe's reliance on a rural constituency for sustaining his rule left a lacuna because during his tenure, in contrast to rural areas, the country had no urban policy; a situation that contributed to an urban malaise" (Matamanda, 2020a, p. 805). Today, a legacy of poverty and informality in the urbanscape of Africa is succumbed to by its dwellers (Makoni et al., 2023a). Such a situation has led Dube and Chirisa (2012, p. 16) to conclude that "Africa is haunted."

Statistically, 40% of the African population living in urban areas is poor (World Bank, 2020) and informality employs 86% of the continent's employed population (United Nations Conference for Trade and Development (UNCTAD, 2021, p. 48). In Harare, capital of Zimbabwe, one in three people living in the city is poor, while 59% of the economy [highest in Africa] is informal (Ohnsorge and Yu, 2021). The cause of concern is that the country had a promise of a positive economic restructuring for the benefit of its people upon gaining independence in 1980 (Agere, 1998). This promise was never delivered in Harare, a city that was at the centre of African decolonisation and development dialogues in 1980, and today is home to urban poverty and informality (Dube and Chirisa, 2012). This study examines the causes of such a situation in the country. The study conducts a discourse of the post-colonial dialogues on Zimbabwe which, arguably, points to the direction of the country's prominent colonial and post-colonial political figure: Robert Mugabe and his thirty-seven-year rule.

Accordingly, this paper aimed at critically evaluating Mugabe's policy legacies on urban poverty and informality in the country's capital city, Harare. The paper argues that while there is a wealth of African scholarship on urban poverty and informality, research on their historical origins, particularly in relation to urban policy legacies, is still lacking (International Labour Organisation (ILO, 2018, 2020; Chirisa, 2007, 2008; Kamete, 2010; Dube and Chirisa, 2012). This omission has enhanced the complexities of examining and understanding the underlying factors influencing urban poverty and informality in Africa. The paper, therefore, attempted to close such a gap by grounding its discourse on the concept of Mugabeism and the postcolonial dialogues on Harare city's poverty and informality and provided policy implications on urban management in the city and similar destinations across the Global South.

MUGABEISM: CONCEPT AND DEBATES

Mugabeism is seen as one of the many ways used to personify Mugabe as both a celebrated Africanist and a villain who presided over economic collapse and bad governance (Mahomva, 2021). This is a concept that was developed by Ndlovu-Gatsheni (2009, p. 1139) who described it as "a summation of a constellation of political controversies, behaviour, ideas, utterances, rhetoric and actions, which have crystalised around Mugabe's political life." Relatedly, Machingura (2012) refers to the concept as 'Mugabology', though it does not

change the narratives attached to the original term. It is noted that "Mugabeism draws significantly on the notion of power, authority and colonialism, central issues in the post-colonial theory and based of characteristics of deception, authoritarian and populism" (Matamanda, 2020a, p. 806).

Mugabeism is a concept that is crafted in line with Robert Mugabe's life, more especially his rise to power and his thirty-seven years in power. The concept can be referred to as a "creature of colonialism." As Ndlovu-Gatsheni (2009) articulates, African nationalists and African nationalism are a product of colonialism. In this sense, it can be argued that Robert Gabriel Mugabe was politically produced by colonialism. Matamanda (2020) argues that from a different perspective, Mugabeism is associated with correcting colonial injustices linked with marginalization, oppression and segregation of the black populace. On the contrary, other scholars are of the view that Mugabeism is a form of racial chauvinism and fascism that centres on liberal governance with a focus on power and authority (Moore, 2015; Mamvura, 2020; Mpofu, 2021).

From its foundation, the concept of Mugabeism characterizes an idea of populism, and it enunciates people's needs, demands and claimed rights (Laclau, 2005; Matamanda, 2020a). This implies that the concept attempted to fulfil the demands of the Zimbabweans through a promise of independence from British colonial rule. The concept, however, is conflicted and paradoxical, as Mugabe, during his reign, weaponised his policies against the very people he promised freedom. The concept is characterized by confusion as, "Mugabeism has articulated issues of liberation and oppression; peace and war; reconciliation and retribution; empowerment and dispossession; victimhood and heroism; social justice and injustice; social harmony and violence" (Ndlovu-Gatsheni, 2009, p. 1141).

In concurrence, Mine (2013, p. 112) describes Mugabeism as "Janus-faced with contradictions, representing Africanist populism, leftist nationalism and patriarchal ruthlessness." These contradictions exist because the concept of Mugabeism has evolved and differs based on the different phases of Mugabe's era. For example, Ndlovu-Gatsheni (2009) indicates that Mugabe in his later years had complete disregard for the right of the white race to coexist with the native black population unlike the Mugabe of the 1980s who was tolerant and sought reconciliation.

During the first years of independence, Mugabeism represented populism ideologies as policy statements from Mugabe were focused on delivering on the demands of the people of Zimbabwe. This, however, changed in the years that followed, specifically during the early 2000s when Mugabeism began to be associated with tyranny and violence (Matamanda, 2020a). In this paper, the authors ground on the concept of Mugabeism because of the contested nature of cities, especially, during colonization as Africans were restricted access to certain areas and largely confined to rural areas (Mutamanda, 2020a). Given that the foundations of Mugabeism are centralized on redressing such issues on urban development, critically exploring the concept with the current urban outlook of Harare, especially regarding the city's poverty and informality is crucial.

URBAN GOVERNANCE IN HARARE: AN URBAN POVERTY AND INFORMALITY DISCOURSE

Urban poverty entails the poor economic conditions that are faced by the people living in urban areas. The term is be associated with the wellbeing of the

urban citizens in terms of employment issues, and provision of communal services such as water, electricity and health services. In a developing context, poverty is a key characteristic, in which the poor are mostly marginalized and sidelined from the formal spheres of the urbanscape, resulting in a situation in which they must fend for themselves to survive (Makoni et al., 2023b). Thus, the existence of urban informality, a term referring to the informal economic activities taking place in urban areas, is inseparable from urban poverty because the earlier is largely the only survival option for the poor. Harare is such a city characterized by urban poverty and informality, with these two traits having evolved since the country gained independence in 1980 (Matamanda, 2020a). Until 2017, the country had only known one president in the name of Robert Mugabe for thirty-seven years. The policies and governance approaches adopted by Mugabe, as well as the legacies of such, are, undoubtedly, key in analysing the current conditions in Zimbabwe, especially the urban poverty and informality. Mugabe's policies played a big role in the mushrooming of the informal sector in Harare (Wekwete, 1989; Gumbo and Geyer, 2011; Marewo, 2020). Some of his many policies that are argued to be central for destroying the formal economy and growing informalisation include the Economic Structural Adjustment Programme (ESAP), awarding millions of dollars to liberation war veterans, the Fast Track Land Reform Programme (FTLRP) and ZANU-PF conflicts with other political parties (see Table 1).

Table 1. Key Mugabe policies and decisions leading to urban informality and poverty in Harare (Source: Adapted from Chirisa et al., 2020)

Period	Probable cause	General description	Comments
The early 1990s	Adoption of ESAP	ESAP presents the following prescriptions among others: • Deregulation of the transport sector • Privatization of companies • Withdrawal of state aid from some companies	The reduction of state aid in diverse sectors exposed companies to heavy shocks and stresses that saw the downfall of many companies. Other retrenched workers found sanctuary in the informal trading sector
Late 1990s	Awarding of unbudgeted millions of dollars to ex-combatants	This left the economy in tatters	Appeasement of ex-combatants at the expense of addressing pressing issues is tantamount to misplacement of priorities. This strained and already overstrained economy. Various effects were pronounced in an increase in informal activities.
The early 2000s	Fast Track Land Reform Programme	Transfer of land titles from the white minority to the black majority	Being an agricultural-based economy, a significant percentage of upstream and downstream industries collapsed, leaving a substantial quantity of people jobless. This partly pushed employment-seeking citizens into informality.

| Late 2000s | Political and socio-economic conflict among political parties | General lack of consensus among the ruling party, ZANU-PF, and two formations of the key opposing party, MDC-T and MDC-M, especially prior to, during and after the 2008 presidential elections | Protracted political and socioeconomic conflict melted the economy down to its knees. Nearly all systems became dysfunctional, and everything turned informal with high levels of clientelism and corruption more pronounce |

Norman (2015) claims that many people have failed to make sense of Mugabe. Since the time that urban people voted overwhelmingly for the MDC in the 2000 and 2002 parliamentary and presidential elections, urban Zimbabweans have increasingly been presented as not belonging to the nation (Ndlovu-Gatsheni, 2009, p. 151). It therefore becomes crucial to review Mugabe's policies and evaluate how they have exacerbated socioeconomic disparities and undermined the livelihoods of urban residents. By critically analysing the intersection of governance and informal economies, the long-term impacts of Mugabe's regime on urban poverty and informality can be uncovered.

METHODS

This paper utilized a qualitative research design based on biographical and historical methods. Using these methods, this study focused on analysing a biographical and historical account of Robert Mugabe, and the authors were able to gain insights and reflect into Mugabe's political life, especially regarding his policies and urban control approaches which shaped the current nature of poverty and informality in Harare. This focus on biographical and historical methods in this paper is in line with Matamanda's (2020a) work on Mugabe's Urban Legacy, who asserts that, "the life history of Mugabe narrated in different biographies provided insight into his life, governance approaches and tactics he used to manage cities" (Matamanda, 2020a, p. 807).

In that regard, books, and texts with historical and biographical accounts of Robert Gabriel Mugabe (see Table 2), were key in providing insights into the arguments, and conclusions made thereof, presented in this study.

Table 2. Historical and biographical accounts of Robert Mugabe
(Source: Authors)

Author(s)	Book Title	Remarks
Agere (1998)	Zimbabwe Post Independence Public Administration: Management Policy issues and constraints	This book lifts the lid on the contradictions, constraints and difficulties in pursuing policies for change within a rusting and out-of-date administration system. Drawing on the specifically Zimbabwean experience of researchers, academics, policymakers and administrators, the book explores several critical issues about the historical and current development of public administration as an instrument of the state.
Meredith (2002a)	Robert Mugabe: Power, Plunder and Tyranny in	The author gives an account of Mugabe's regime from the time of the country's independence.

	Zimbabwe	
Meredith (2002b)	Our Votes, Our Guns: Robert Mugabe and the Tragedy of Zimbabwe	The author gives an account of Zimbabwe as a country beset by violence, lawlessness and famine, regarded as a pariah among nations.
Raftopoulos and Savage (2004)	Zimbabwe: Injustice and Political Reconciliation	The book describes Zimbabwe as a country in crisis, precipitated by the Mugabe's regime. The book offers the views of a number of Zimbabwean commentators on key areas to transition out of the crisis.
Nyarota (2006)	Against The Grain: Memoirs of a Zimbabwean Newsman	This book records the author's early life as a school teacher caught in the crossfire of a guerilla war, his cadetship at a newspaper subsequently acquired by the Mugabe government, the official corruption and graft he exposed during his career, and how he eventually had to flee his homeland in 2003 to go to exile
Godwin (2010)	The Fear: The Last Days of Robert Mugabe	This book is a personal journey by the author through the country [Zimbabwe] he grew up in. At considerable risk, the author travels widely to see the torture bases, the burned villages, the death squads, the opposition leaders in hiding, the last white farmers, the churchmen and the diplomats putting their own lives on the line to stop the carnage.
Bourne (2011)	Catastrophe: What went wrong in Zimbabwe?	The author shows how a country that had every prospect of success when it achieved independence became a brutal police state less than thirty years later, plagued by hyperinflation and collapsing life expectancy and abandoned by a third of its citizens.
Compagnon (2011)	A Predictable Tragedy: Robert Mugabe and the Collapse of Zimbabwe	The author reveals that while the conditions and perceptions of Zimbabwe had changed, its leader had not. The author indicates that from the beginning of his political career, Mugabe was a cold tactician with no regard for human rights. Through eyewitness accounts and unflinching analysis, the author describes how Mugabe and ZANU-PF built a one-party state under an ideological cloak of anti-imperialism.
Moorcraft (2012)	Mugabe's War Machine	This book tracks the rise of Mugabe and decodes his psychology in the context of Zimbabwe's military history. His leadership of a guerilla army against white rule explains how Mugabe continued to rule Zimbabwe as though he were still running an insurgency. The book explains that Mugabe used military power, police and the dreaded Central Intelligence Organization to enforce his will against a series of perceived enemies. The book also recounts South African attempts to keep the current government of national unity alive, despite the growing oppression.
Pilossof (2012)	The Unbearable Whiteness of Being: Farmer's	The author explores Zimbabwean white farmers' voices in memoirs and interviews. The focus is on the Liberation War, Operation Gukurandi, and the post-2000 land invasion frames.

	Voices from Zimbabwe	
Nyarota (2018)	The Graceless Fall of Robert Mugabe: The End of a Dictator's Reign	The author evaluates the political and economic impact of Mugabe's presidency, showing how he managed to reduce a prosperous nation to a state of destitution through extreme misgovernance. The book describes the rifts within ZANU-PF as Mugabe sidelined anyone who might challenge his power.

In addition, to make a critical review of the subject under investigation, a triangulation method was employed, in which the biography and historical account of Mugabe were triangulated with multiple data sources. The purpose of doing so was to close any loopholes or gaps that could arise in using a few sources, because subjects of history may have altered narratives, and may omit some issues or forget some crucial aspects (Caetano and Nico, 2019). Accordingly, the biographical and historical accounts of Mugabe were triangulated with other sources such as, inter alia, journal articles, policy, and statutes documents, textbooks, and newspaper articles to boost the validity and substantiality of this study. The data obtained through this approach formed the foundation for the arguments presented in this research paper. This data was analysed thematically, and the resulting themes are detailed in the following subsections.

A PROMISE OF INDEPENDENCE: EXPECTATION VERSUS OUTCOME

Mugabe is considered a contested character viewed by some as an African icon and liberator while in other instances he is seen as a dictator and tyrant (Tshuma and Sibanda, 2024). He is counted among the first generation of African nationalists credited for spearheading colonial resistance in Zimbabwe and fighting inequality in the pre-independent Zimbabwe (Mahomva, 2021; Zvoushe, 2023). Upon assuming office, Mugabe showed signs of delivering the promise of independence to the Zimbabwean people. When independence was achieved in April 1980, "the Mugabe government had introduced populist policies, such as the provision of free education and health services with a promise to provide housing for all by the year 2000" (Nyarota, 2018, p. 60).

Mugabe's policies were centred on economic democratization, land redistribution, uniting Zimbabweans across the political divide and development-oriented (Mahomva, 2021). Public expenditure was directed towards improvement in rural infrastructure, social service provision and the reduction of inequalities (Banda and Ngwerume, 2014). This drive saw the country excelling in health care, education and agriculture production (Dorman, 2018). However, some argue that this was short-lived as the administration of such schemes is said to have been overspent without restraint, a system that continued throughout Mugabe's regime. Nyarota (2018) observed that in the context of urban areas, failure to provide basic services such as running water and a functional sewage system later became a constant feature, signalling bad governance by the Mugabe regime.

The turn of events in Zimbabwe a few years after independence was a big contradiction to the promises of prosperity made during the liberation struggle with the Rhodesian white settlers (Stone, 2022). The Rhodesian government, even though it was under sanctions, had a vibrant and self-sufficient economy (Makina, 2010). However, inequality and the oppression of the black majority

both politically and economically were the major drivers for the armed struggle with the colonial government (Nemuramba, 2017). For example, the Rhodesian government pursued a racist education policy that prioritised the white race (Zhou and Zvoushe, 2012). In addition, Africans were not allowed to own land in certain parts of the country reserved for whites only and in most cases, these were areas where commercial agriculture was viable (Mlambo, 2017). Thus, the land question was always a sticking issue in the pre-colonial era due to the disposition of the indigenous black people from their ancestral land by successive colonial governments (Mavhunga, 2018). Also, inequalities existed in access to capital as black entrepreneurs didn't have access to loans from financial institutions (Mlambo, 2017). In light of all these colonial injustices, the black people engaged in a liberation war hinged on the promises of equality and equity (Mavhunga, 2018).

HISTORICAL POLICY DEVELOPMENTS AND THE URBAN INFORMAL ECONOMY

During the colonial era, urbanisation of native Zimbabweans was strictly governed, and it restricted them from obtaining permanent residency in urban areas (Potts and Mutambirwa, 1990). The urban areas were seen as a preserve of the whites and the blacks were only allowed in the urban space to provide labour (Chigudu, 2019). This resulted in many Zimbabweans having to return to overcrowded rural areas once their work was done in the urban areas. The political optimism of independence in the 1980s followed by urban regeneration saw an influx of people in urban areas in search of better economic fortunes (Groves, 2012). Economic migrants that had been previously restricted to the rural areas by colonial laws started occupying the urban landscape amid a growth in urban formal employment (Potts, 2016). However, over the years, several policies introduced by the Mugabe-led government resulted in an economic downturn and massive job losses. Most people in urban areas that had relied on the formal economy turned to the informal economy for survival giving rise to a highly informalized urban society.

Economic Structural Adjustment Programme (ESAP) (1990)

The Economic Structural Adjustment Programme (ESAP) was introduced in 1990 to liberalise the economy, reduce government spending and drive privatization (Matamanda, 2021). This was a World Bank-sponsored economic policy aimed at achieving a market-driven economy (Peter and Jephias, 2016). This policy was introduced against the backdrop of weaknesses of the controlled economic policies adopted by the Mugabe government in the first decade after independence. Notably, the introduction of the cost-sharing measures requiring the payment of user fees for service provision had dire consequences for mostly the poor and vulnerable members of society and led to a reversal of the gains made in the education and health sectors (Banda and Ngwerume, 2014). ESAP saw a significant increase in price levels and a rapid reduction in disposable income such that by 1995 an estimated 62% of the population was unable to afford basic needs and 46% were food insecure (Chirau and Chamuka, 2013). The programme generally failed to improve the economic prospects of the country, rather it led to massive loss of employment, dwindling job opportunities in the formal market, company closures and pushed people into the informal sector (Dlamini and Schutte, 2020). Inflation and unemployment characterized the economy as industries scaled down their operations or closed down (Nyarota,

2018). In general, ESAP is said to had dire consequences on Zimbabwe's economy and the general welfare of people leading to an alarming growth of the informal economy, especially in the urban areas, as people sought alternative means of survival (Chirau and Chamuka, 2013; Mahomva, 2021).

Zimbabwe Programme for Economic and Social Transformation (ZIMPREST) (1996-2000)

ZIMPREST was an economic policy tool that was introduced by the Zimbabwean Government to correct the failures of ESAP (Bonga, 2014). The main purpose of ZIMPREST was to stabilize the macroeconomic environment, improve people's standards of living, and facilitate public/private savings and investments (Peter and Jephias, 2016; Zhou and Hardlife, 2012). It sought to among other things achieve the broader social and political agenda of black economic empowerment, poverty reduction, indigenisation of the economy and land reform (Makina, 2010). In essence, ZIMPREST just like ESAP failed to achieve its intended outcomes (Nyoni, 2018). The success of ZIMPREST was hampered by numerous challenges bedevilling the country such as a growing budget deficit, high rates of inflation, recurrent droughts and foreign currency shortages (Banda and Ngwerume, 2014). The lack of financial resources is cited as one of the major reasons that affected the implementation of ZIMPREST (Zvoushe, 2023). During this period, the informal economy continued to grow and absorbed most of the people who suffered retrenchment due to the economic haemorrhaging (Dlamini and Schutte, 2020).

War Veterans compensations and the "Black Friday" (1997)

Due to a lack of delivering the promise of independence, in 1997 Mugabe faced protests from the war veterans of Zimbabwe's liberation war. The war veterans were said to have felt neglected by Mugabe's government, whose fortunes had been changing for the better while the war veterans were living in poverty. By this year, the number of war veterans had risen to 50,000. Mugabe experienced significant pressure from this growing powerful sector of his ZANU-PF party (Nyarota, 2018). As a result, the government of Zimbabwe awarded each war veteran an unbudgeted once-off payment of Z$ 50,000 (US$4300) and a monthly pension of Z$ 2000 (US$174) (Gaidzanwa, 2020). This worsened the economic situation of the country as these disbursements were unbudgeted (Dlamini and Schutte, 2020).

The payments led to the significant collapse of the Zimbabwean economy. On November 14 1997 the Zimbabwean dollar lost approximately 71.5% of its value against the US dollar in just over four trading hours (Mlambo, 2017; Nyarota, 2018). This day is synonymously known as 'Black Friday' in Zimbabwe, the day that the Zimbabwe dollar significantly lost value largely due to fiscal indiscipline and unplanned expenditures by the Mugabe-led government (Makina, 2010). The compensation to war veterans was one of the worst economic decisions made by Mugabe's governance, especially given that the economy was still recovering from the problems created by EASP. Compensating the war veterans put pressure on the already struggling economy leading to increased pressure on citizens.

The Democratic Republic of Congo (DRC) civil war (1998)

The arbitrary deployment of the military to the DRC in 1998 is argued to be another miscalculated decision that had dire consequences on the Zimbabwean economy (Mlambo, 2017). The Zimbabwe National Army (ZNA) was deployed to assist the DRC government fight off rebels backed by Rwanda and Uganda, albeit, without parliamentary or cabinet approval and without informing the population at large (Nyarota, 2018). This was regarded as a costly endeavour both politically and economically. The war, at one point, was estimated to cost the country US$10 million a day (Gadiel, 2018). Other estimates point out that Zimbabwe spent not less than US$200 million in unbudgeted funds in the two years it was involved in the DRC war (Nemuramba, 2017). This resulted in a rapid rise in inflation in the country, leading to the investors leaving. Due to many companies closing down, many people lost their jobs and had to struggle to survive, a situation that escalated informality and poverty in major cities, especially in Harare.

Fast Track Land Reform Program (FTLRP) (2000)

When Mugabe came to power, the economy was largely based on agriculture dominated by white farmers producing mainly tobacco among other cash crops (Dande et al., 2020). The willing–buyer–willing–seller concept introduced in the 1980s was slow in addressing the emotive land issue (Mlambo, 2015). However, in the year 2000 Mugabe initiated a chaotic Fast-track Land Reform Programme that saw a series of violent invasions and takeover of the white-owned commercial farmlands (Matamanda, 2021; Mlambo, 2017). This came against the backdrop of the formation of the opposition Movement for Democratic Change Party which challenged Zanu PF's and Mugabe's hold on power (Chirau and Chamuka, 2013). Arguably, the Fast Track Land Reform Programme was seen as a tool for political survival for Mugabe and his party (Zhou and Zvoushe, 2012). Despite being awarded the pension funds and lump sums of money three years earlier, the disgruntled war veterans, who had felt Mugabe had failed them, welcomed the FTLRP and were at the forefront of the farmland seizures (Helliker and Murisa, 2020).

Mugabe argued that the land reform programme was meant to empower the landless black people, yet critics point out that this was motivated by the need to consolidate power and appease Mugabe's loyalists. "In his rhetoric, the 'return' of the land to its 'rightful' owners marked the completion of the decolonisation process" (Ndlovu-Gatsheni, 2009, p. 1140). The fast-track land reform is criticized for destroying the once vibrant agricultural sector in Zimbabwe and pushing farm workers into poverty. It transformed the country from being a net exporter to a net importer of maize resulting in food insecurity for millions of Zimbabweans (Gadiel, 2018). Moorcraft (2012) further argues that the loss of agricultural productivity accelerated the deterioration of the economy. In addition, the programme invited sanctions from the international community further worsening the economic conditions of the country which culminated in hyperinflation that reached its peak in the years 2008-2009 (Sabao et al., 2021). Further, the loss of employment, considering that the agricultural sector was the biggest employer in the country, meant that many citizens had to find alternative ways to survive. Hence the rapid increase of informality and poverty in urban Harare.

Urban control policies and the Operation Murambatsvina (Restore order) (2005)

The Mugabe government was characterized by fluctuation in the urban control policies. At one point informality was supported as one of the key sectors to curb poverty and unemployment, and at some point, treated as a nuisance. Urban control policies in Harare were formulated, initially, to address the urbanscape racial inequalities of the colonial era. Mutamanda (2020a, 2020b) indicates that Harare was preserved for the Europeans during the colonial period. This was typical to most major cities in colonised African, in which urban spaces were occupied by the Europeans and the natives were restricted to the rural areas, the only natives staying in the urban areas were those employed as either maids/helpers or in the industries within the cities (Potts, 2006). As the colonial segregation laws to city occupation were relaxed on the birth of independence, Harare city experienced a new wave of rural-urban migration (Mutananda, 2020a). Poor urban housing policy by the Mugabe government led to an increase in informal settlement within urban areas (Matamanda, 2021). This placed a strain on social services and an urgent need to create employment. In 2005, the government launched Operation Murambatsvina/restore order to clear the informal settlement and bring order within the urbanscape (Gaidzanwa, 2020). The operation destroyed home industries that had become the backbone of the informal economy further pushing most urban residents into poverty (Jones, 2010). Illegal housing structures and market stalls were the main targets of operation as the city further argued for the need to get rid of dirt and chaos in urban settlements (Nyere, 2016). Consequently, the United Nations reports that around 700,000 people lost their source of livelihoods and at least 2.4 million people were directly and indirectly affected by this exercise (Mutongwizo and Mutongwizo, 2023; Potts, 2006). Considering that the country's economy had become highly informalized, the destruction of structures used by informal traders robbed the majority of their means of survival further worsening the living standards of people in urban areas (Nyamudo, 2020).

Indigenisation and Economic Empowerment Programme (IEEP) (2007)

The Mugabe-led government introduced the IEEP in 2007 requiring foreign-owned companies to cede 51% of their share ownership to locals (Gadiel, 2018). The policy aimed to give opportunities to black people who were previously marginalized during the colonial era to own companies and participate in the national economy (Zhou and Zvoushe, 2012). It sought to achieve redistributive justice for the native black Zimbabweans who were disadvantaged by the colonial governance system (Zvoushe et al., 2018). In addition, this was seen as a way of increasing local participation in the formal economy that was largely dominated by foreign white-owned companies (Saunders, 2023). This policy encouraged the growth of entrepreneurship and spearheaded the provision of loans for locals to start their businesses (Gunhidzirai, 2023).

The critics of this programme argued that this was another façade created by the Mugabe government to benefit only the politically connected (Chigudu, 2019). Again, this policy was seen in some circles as a political strategy to win votes in the run-up to the 2008 general elections (Mlambo, 2017). Also, policy inconsistency and confusion on the implementation and interpretation of the policy among government ministries did not help the situation (Zvoushe et al., 2018). Instead of achieving economic growth, the IEEP, however, resulted in investor flight, a reduction in foreign direct investment and economic isolation of the country from the rest of the world (Balisi et al., 2020). The policy is

recognised for its destructive effects on the economy which led to the closure of formal businesses further increasing poverty levels and pushing people into the informal economy (Balisi et al., 2020).

Zimbabwe Agenda for Sustainable Socio-Economic Transformation (ZimAsset) (2013-2018)

This economic policy followed the landslide election victory by Mugabe and his Zanu PF party on 31 July 2013 bringing to an end the Government of National Unity that existed between 2009 and 2013 (Peter and Jephias, 2016). ZimAsset was anchored on employment creation, indigenisation and empowerment (Nyoni, 2018). The policy was anchored on four clusters which are Food Security and Nutrition; Social Service and Poverty Eradication; Infrastructure and Utilities and Value Addition and Beneficiation (Bonga, 2014). ZimAsset is largely seen as another policy failure by the Mugabe government mainly because it emanated from the Zanu PF Manifesto (Shereni, 2022). Regardless of its promises, the weak institutional and operational systems hampered ZimAsset from achieving its intended outcomes (Gunhidzirai, 2023). By the time Mugabe was toppled from power on 17 November 2017, ZimAsset was yet to record any significant gains in improving the economic fortunes of the country and the livelihoods of the people.

CONCLUSION

This study concludes that Mugabe's policies markedly worsened urban informality and poverty in Harare, creating a persistent economic and social divide. The legacy of these policies has left many urban residents struggling with inadequate resources and precarious living conditions, highlighting the need for substantial intervention and reform. To address these issues effectively, several recommendations are crucial. First, it will be beneficial to relook current urban policies. The targeted economic policies should be implemented to support and formalize businesses operating in the informal sector. This could include providing microfinance options, simplifying registration processes, and offering training programs to help informal entrepreneurs transition to the formal economy. By doing so, the government can stimulate economic growth and improve job security for urban residents.

Second, investing in infrastructure and public services is essential to enhance the quality of life in underserved urban areas. Improving access to clean water, sanitation, and reliable electricity, as well as upgrading transportation networks, can alleviate some of the challenges faced by those living in informal settlements. Such investments can also foster a more inclusive urban environment, reducing the disparity between different socioeconomic groups. Lastly, strengthening governance and accountability is critical to ensure that resources are distributed fairly and that development projects are effectively implemented. Transparent and accountable governance can help to prevent corruption and ensure that policy interventions reach those who need them most. This approach will not only address immediate needs but also build long-term resilience and trust in public institutions.

By adopting these recommendations, African nations can better tackle the complexities of urban informality and poverty, paving the way for more equitable and sustainable development. This study is not without its limitations, firstly it is based on a review of secondary literature sources excluding the voices of key

informants that are critical in informing debates on the policy environment and urban informality. Also, the study is limited to the policy discourse during the 37 years of Mugabe's rule. Future studies can employ primary research methods involving policymakers to fully understand the link between economic policies, urban informality and poverty. Further studies can also be employed to understand the policy environment in the post-Mugabe era.

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ANCHORING CULTURAL PRESERVATION IN ANOTHER LAND: ETHIOPIAN DIASPORAS IN SOUTH AFRICA

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Abstract: The study aims to investigate the motivational factors and efforts made by diasporas and their descendants to maintain and preserve their heritage, customs, and traditions despite being far from their homelands. The study employed the quantitative research design and collected data from Ethiopian diaspora members who reside in Johannesburg using non-probability convenience sampling. Findings showed that the diasporas seek to keep their cultural identity alive, creating a "home away from home" through cultural events that reflect their culture. However, the study found that cultural preservations in host countries have challenges, such as a lack of awareness of where the cultural events are held and highlights the need for support to enhance cultural preservation by migrants. The study contributes to the literature on anchoring cultural preservation as diasporas. Policymakers, governments, and managers must establish targeted policies and strategies to support the integration of migrants into host societies while promoting multiculturalism, inclusiveness, resilience, and sustainable communities, thus contributing to sustainable development goal 11 and bridging the gap of missed opportunities from diaspora tourism. The study provides future research directions.

Key words: Cultural preservation, diaspora tourism, Ethiopia, South Africa

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INTRODUCTION

Diaspora tourism, a transnational mobility (Zhu, 2023), characterised as the travel of diaspora members to their ancestral homelands in search of a connection to their roots and personal heritage (Huang et al., 2013). It is a form of tourism that focuses on tourism produced, consumed and experienced by the diasporic communities in a different country (Coles and Timothy, 2014). The proliferation of migration, globalisation, technology and transportation advances have influenced transnational mobilities (Wang and Witte, 2023), while the spatial concentration of production in cities attracts international labour (Zack and Landau, 2022). A total of 281 million diasporas resided in foreign countries permanently in 2020, comprising 3.6% of the global population (Chen et al., 2023), a significant indicative number of the diaspora market, with implications for diaspora tourism and its approaches thereof (Li et al., 2020). According to the European Union Diaspora Facility (EUDiF, 2020), the eagerness of diaspora communities to preserve their heritage has recently directly impacted framing diaspora engagement initiatives. For example, New Zealand's Ministry of Pacific Peoples has established a community fund supporting Pacific language learning. At the same time, the Fiji government has developed the iVolavosa App, a mobile dictionary for iTaukei (one of Fiji's official languages), encouraging the diaspora to learn from abroad, both government initiatives which show the government's efforts to connect and preserve the country's culture diaspora communities (EUDiF, 2020).

Diaspora tourism plays a crucial role in cultural preservation, serving as a connection to the diaspora's cultural heritage (Wang and Witte, 2023). The diasporic communities maintain their cultural identity and traditions to foster connections with their heritage in various ways, such as establishing immigrant businesses that produce cultural cuisine, fabrics and spices (Rahman et al., 2021). They (diaspora members) seek a sense of belonging and cultural connection that drives their desire to visit their ancestral land (Utomo, 2020). Moreover, it enables the promotion of cultural heritage, such as the celebration of ethnic traditions, as they form an integral part of the cultural identity of diaspora members (EUDiF, 2020).

Migration is a multifaceted phenomenon continually shaped by socio-economic and political factors (Sarker and Islam, 2018). Similarly, Ethiopian migrations have been influenced by economic challenges coupled with the proliferation culture of migration embedded among the locals (Dessiye, 2021). In the current study, the Ethiopian diaspora refers to Ethiopian migrants and their dependents residing in South Africa. After the end of apartheid, South Africa opened up to the world. Economic sanctions were lifted, resulting in increased migration from other countries. (Feyissa et al., 2023). The establishment of asylum laws in South Africa, post-1994, at the end of apartheid, further facilitated Ethiopian migrations by enabling Ethiopians to seek refuge and better opportunities in South Africa (Estifanos and Freeman, 2022).

Previous studies have explored migration factors (Estifanos and Freeman, 2022; Feyissa et al., 2023) and the challenges Ethiopian migrants face (Atnafu and Adamek, 2016; Markos, 2023). Feyissa Dori et al. (2024) investigated migration decision-making and argued that intangible factors, such as religious

beliefs, norms, imaginations, emotions and feelings, and tangible factors, such as livelihood opportunities, inform and reinforce each other when making migrating decisions. Zack and Estifanos (2018) researched the social connections and dislocation of Ethiopian migrants in Johannesburg. Their study found that the strength of formal and informal ethnic social networks affects social relations. However, despite Zack and Estifanos' (2018) study, which has implications for managing cultural heritage, it lacks ways to anchor cultural preservation. Globalisation and technology can erode traditional practices, values, and cultural identity without clearly defined ways of preserving culture. This calls for constant research on motivational factors, which constantly change due to increased globalisation. Moreover, most studies of diaspora tourism have focused on inbound and outbound travel (Cater et al., 2019). To address these gaps, this study's objectives are to investigate the motivational factors and explore how the Ethiopian community in Johannesburg preserve their cultural heritage.

The study contributes to literature and policy as it offers a comprehensive understanding of the migration factors and the cultural preservation of the Ethiopian community in Johannesburg, South Africa. This study can help promote cultural exchange with mutual respect between the Ethiopian community and the population of South Africa. Stakeholders can host major Ethiopian festivals open to the public, fostering multiculturalism through diaspora tourism.

LITERATURE REVIEW
Diaspora and migration

The concept of diaspora has been of interest to multidisciplinary scholars and studied from the perspective of sociology, anthropology, history and political science, exploring a wide range of topics in the context of cultural, political and economic dynamics within and across nations (Klarenbeek, 2024; Tichaawa, 2017; Sheller and Urry, 2006). The term 'diaspora' originates from the Greek word. 'dispersion', which means to spread out or scatter abroad (Cater et al., 2019) and stems from the emigration of the Jewish people from Israel to other countries. In academic literature, the term diaspora has acquired a wide range of semantic domains such as immigrants, political refugees, overseas communities, and ethnic and racial minorities (Shuval, 2000). It is used increasingly as the dispersion of a group of people from their homeland to another country, encompassing voluntary and forced migration experiences to search for employment, trade, or escape conflict or persecution (Huang et al., 2013; Karagöz, 2023). Thus, diaspora tourism has a notable and intertwined relationship with migration, as they are both important forms of human mobility (Karagöz, 2023).

Migration is driven by economic and survival purposes, giving rise to movements of different communities from one place to another (Li et al., 2020). Migration factors encompass push-pull dynamics that drive individuals away from their home countries or attract them to host nations (Tsegay, 2023). In contrast, Lee's theory of migration argues that migration has four factors: factors associated with the area of origin, factors associated with the destination, intervening obstacles, and personal circumstances (Veljanovska-Blazhevska, 2017). Push factors that influence migration worldwide include economic factors (such as lack of job opportunities, high cost of living), social factors (like low

standards of healthcare facilities, the lack of educational opportunities and religious tolerance), political push factors (like unfair legal systems, war and terrorism, and the lack of governmental tolerance) (Estifanos and Freeman, 2022; Tsegay, 2023). Pull factors are attributes of the host country that attract individuals to migrate, often referred to as place utility, which is the desirability of a country that pulls people to migrate (Veljanovska-Blazhevska, 2017). They can be categorised into economic factors (which include better job opportunities, improved working conditions and higher wages), political factors (like freedom from persecution and better legal protections), social factors (like enhanced healthcare and transportation facilities), and miscellaneous factors (Urbański, 2022). Miscellaneous factors include family presence, educational opportunities, cultural diversity, and community vitality (Urbański, 2022).

In migration, diaspora plays a fundamental role as it influences the formation of diasporic community communities, whose motivations significantly determine tourism offerings and destination marketing strategies (Li et al., 2020). Diaspora members are transnational, as their families, feelings, social networks, and cultures are shared between distinct societies (Huang and Chen, 2021). They foster connections among themselves and create supportive networks that help build relationships within the migrant communities by providing each other with resources, such as legal assistance and language classes to improve their competence in host languages, vital for migrants to adapt to the new environment while strengthening their cultural identity (Klarenbeek, 2024). Carbajal (2020) posits that the younger generations who come from migrant parents and were born in different countries other than their parent's country of origin have a lower attachment to their country of origin than their parents or those born in their parent's country of origin.

Cultural preservation

Diaspora tourism plays a fundamental role in the preservation of culture as it allows individuals to engage with their heritage, fostering a sense of identity and belonging (Utomo, 2020), while cultural preservation helps maintain cultural traditions and provides a sense of security and community (Rutagand, 2024), ultimately enhancing their mental well-being and social cohesion of the diasporas. According to Adinolfi (2019), diasporas, like the Portuguese, have used their traditional scout uniform to maintain their identity in South Africa. Food plays a crucial role in cultural preservation as it serves as an expression of cultural heritage and a means of community connection. Saputra et al. (2024) argue for the importance and utilisation of cultural heritage knowledge to achieve sustainable urban agriculture. For example, the use of traditional cultivation methods and carefully selected plants commonly found incorporated into the residential areas of diaspora communities showcase the cultural and historical essence of migrants. These gardens showcase a variety of plant life, including culinary crops and decorative and medicinal plants (Saputra et al., 2024). This way of life is passed down from generation to generation.

On the other hand, traditional recipes, cooking techniques and dining etiquette, which reflect the values of different cultures, facilitate cultures to travel globally when one has migrated to another country and wants to bring a 'taste of home' with them (Sibal, 2018). Traditional recipes must be maintained because they are ingrained with their cultural roots and losing them would result in a part of their culture being lost. Similarly, Ethiopians find pride in

their cuisine, which they use to preserve their cultural history and pass down traditional recipes from generation to generation (Wahome, 2018).

Mexican and Nigerian cuisines used in celebrations feature rich and diverse culinary traditions that reflect the country's culture and history, rooted in religion and regional diversity. For example, Cinco de Mayo is a holiday observed in Mexico and among Mexican communities where food and wine play a vital role in cultural celebrations as they make traditional Mexican dishes such as salsa, enchiladas and guacamole whose flavours and colours of these dishes reflect the spirit of pride and celebration that the holiday represents (De Jesús Contreras and Medina, 2021). The Ethiopian coffee ceremony holds cultural significance as the coffee rituals consist of roasting, grinding, and brewing coffee beans whilst the aroma of the incense surrounds the room's ambience. The ceremony allows people to engage in conversations by interacting with others and establishing connections (Brinkerhoff, 2011). In the same vein, Nigerians, in their food culture, emphasise hospitality and generosity in which guests feel like royalty, driving cultural connection, identity and sense of belonging (Brown et al., 2019). Consequently, food establishes a sense of community and strengthens social relationships through communal dining, coffee rituals, and celebrating cultural diversity (Dejen and Tadese, 2022), while the cultural festivals and celebrations held in host countries are important means for diaspora members to honour and promote their cultural heritage (Mukherjee, 2021).

Ethnic restaurants and shops are vital in preserving cultural heritage and promoting cultural exchange. It enables them to preserve their culinary traditions and spread them to a broader audience, fostering cultural exchange (Aybek and Özdemir, 2022). This demand has enabled migrants to start businesses that cater to the needs of fellow migrants and locals (Idris, 2015; Zack and Estifanos, 2018). Cultural restaurants serve as custodians of cooking techniques, traditional recipes and ingredients passed down through generations (Aybek and Özdemir, 2022). They provide platforms where locals are presented with traditional cuisine and allow them to learn about the cultural identity and traditions of migrants, fostering cultural exchange (Wahome, 2018) and promoting authenticity because of the unique dining experience potential consumers may encounter, such as their dishes and the décor of the restaurant (Li et al., 2023).

Some shops sell incense, traditional art, and equipment for the ritualised coffee ceremony (Idris, 2015), contributing to the host destination's economic development. Traditional arts and crafts allow people to express their culture while preserving cultural heritage (Tichaawa and Chamboko-Mpotaringa, 2024). Utomo (2020) contends that diasporas use arts and crafts to preserve their cultural heritage, which they share with others in the host country and amongst themselves, reaffirming their feelings of belonging.

Religion offers a space that serves as a source of social capital, facilitating socialisation and the continuation of cultural traditions (Wu et al., 2021). Religious sites, such as churches and temples, hold deep sacred significance and have rich symbolic and artistic meanings (such as statues and carvings in cathedrals which symbolise biblical stories). Though they are physical structures, these spaces are expressions of faith, embodying the cultural heritage and spiritual connections that shape ethnic identities (Sibal, 2018). Historically, religious beliefs have significantly influenced artistic expressions and modern societies (Chukwudebelu, 2024), highlighting the deep-rooted

connection between religion and culture. Orthodox churches in host communities help maintain cultural identity using a variety of factors such as language (Guglielmi, 2022) and clothing, where congregants wear their traditional attires (Tadesse et al., 2020).

METHODOLOGY

The study area chosen for this study is Johannesburg, South Africa, the significant focal point and desired destination for migrants (Centre for Development and Enterprise, 2008) who enter South Africa with aspirations of having a better life, economic opportunities and the established social networks Johannesburg offers (Estifanos and Freeman, 2022). Similarly, Johannesburg has become a centre for Ethiopian migrant businesses and socio-cultural gatherings. Ethiopia is the second most populous nation in Africa, with 126.5 million people in 2023 and one of the fastest-growing economies in the region (World Bank, 2024). Nevertheless, it remains one of the poorest African countries, with a per capita gross national income of $1, 020 (World Bank, 2024). Ethiopian economic needs and aspirations have driven migration across Ethiopia. An estimated 120 000 Ethiopians live in South Africa (Feyissa et al., 2023). Thus, Ethiopian migrants have been selected as the study's population and study area. Non-probability convenience sampling was used, where respondents were selected based on accessibility and convenience. This study adopted a quantitative research design to measure the common reasons for Ethiopian migrants to investigate the motivational factors and explore how the Ethiopian community in Johannesburg preserve their cultural heritage. This study used self-administered questionnaires to solicit information on the profile of the respondents, their motivation for migration, and the ways they preserve their cultural heritage. The analysis utilised SPSS software.

RESULTS
Demographic characteristics

As shown in Table 1, 53.3% of respondents were male and 46.7% were female. Most respondents (46.1%) were aged 18-30, followed by 21.8% in the 41-50 range. Most (53.3%) had secondary/high school education, while 46% were self-employed, which is the highest. Respondents have stayed in Johannesburg for 11-20 years (45.5%) and over 20 years (37.6%).

Table 1. Demographic characteristics
(Data source: Authors based on fieldwork)

Variables	Key Findings	Frequency in %
Gender	Male	53.3
	Female	46.7
Age	18-30	46.1
	31-40	20.0
	41-50	21.8
	51-60	12.1
	61 and older	0.0
Highest level of education	Primary school	0.6
	Secondary/high school	53.3
	Diploma	16.4
	Bachelor's	23.7
	Master's	3.6
	Doctorate	2.4
Employment status	Self-employed	46
	Employee	21.2
	Unemployed	7.9

Variables	Key Findings	Frequency in %
Duration in Johannesburg	Student	24.9
	Less than a year	1.8
	1-5 years	4.8
	6-10 years	10.3
	11-20 years	45.5
	More than 20 years	37.6

Motivations for migration

Results show that most respondents' primary motivations for migration were better job opportunities (44.8%) and business/investment opportunities (37.6%). Additionally, 23.6% migrated to join family and friends, 17% indicated they were born in South Africa, and 13.3% sought to escape political instability. Further studies and career growth motivated 10.9% and 8.5% of the participants, respectively. Notably, only 3% indicated they wanted to escape persecution, and none cited the vibrant Ethiopian culture in Johannesburg as a reason for migration.

Table 2. Motivations for migration
(Data source: Authors based on fieldwork)

Motivations*	Yes (in %)
Better job opportunity	44.8
Better business and investment opportunity	37.6
Join family and friends	23.6
Born in South Africa	17.0
Further my studies	10.9
Escape political instability	13.3
Career growth	8.5
Escape persecution	3.0
Vibrant Ethiopian culture in Johannesburg	0.0

Notes: *Respondents could select more than one motivation for migrations. Only yes responses are shown.

Further analysis examined variations in motivations for migrations among the different groups of respondents according to the highest level of education attained. Findings (Table 3) show statistically significant differences for better job opportunity (F=3.523, p=0.005), better business and investment opportunity (F=4.785, p=<0.001), join family and friends (F=7.682, p=<0.001), further my studies (F=6.333, p=<0.001) and career growth (F=14.062, p=<0.001). No statistically significant differences could be established for those born in South Africa (F=1.843, p=0.107), those who escaped political instability (F=2.090, p=0.069) and those who escaped persecution (F=0.451, p=0.812).

Table 3: Results of one-way ANOVA testing the variations in motivations for migrations among different groups based on the highest level of education attained
(Data source: Authors based on fieldwork)

Motivations for migration	Sum of squares	df	F	Sig. P
Better job opportunity	4.071	5	3.523	0.005
Better business and investment opportunity	5.062	5	4.785	<0.001
Join family and friends	5.794	5	7.682	<0.001
Born in South Africa	1.274	5	1.843	0.107
Further my studies	3.639	5	6.333	<0.001
Escape political instability	1.176	5	2.090	0.069
Career growth	3.928	5	14.062	<0.001

Motivations for migration	Sum of squares	df	F	Sig. P
Escape persecution	0.068	5	0.451	0.812

Cultural activity participation

The results of the chi-square test (see Table 4) showed that there were significant relationships between the frequency of cultural participation in cultural festivals and celebrations (x^2=57.004, p<.001), religious ceremonies (x^2=19590, p<.001), traditional music and dance (x^2=40855, p<.001), food (cooking and cuisine) (x^2=26.981, p<.001) and community meetings (x^2=17.990, p<.001). Almost two-fifths (37.1%) of the respondents very frequently attended community meetings. In comparison, traditional music and dance (35.6%), festivals and celebrations (35.3%), and arts and crafts (35.2%) had an almost equal representation of respondents who attended these activities very frequently. Similarly, 32.2% very frequently engage in food (cooking and cuisine) activities, while 35% frequently attend religious ceremonies. About one-quarter (23.9%) attend language classes. In contrast to these cultural activity participation rates, there is no significant difference in frequency participation in arts and crafts (x^2=5.497, p<.240) and language classes (x^2=1.106, p<.893).

Table 4. Cultural Activity Participation.
(Data source: Authors based on fieldwork)

Activity		Participation Rate				X^2	p
		Rarely	Occasionally	Frequently	Very frequently		
Festivals and celebrations	Yes	6.5	19.4	38.8	35.3	57.004	<.001
	No	57.7	34.6	3.8	3.8		
Religious ceremonies	Yes	12.1	21.0	35.0	31.9	19.590	<.001
	No	62.5	37.5	0.0	0.0		
Traditional music and dance	Yes	5.9	16.1	42.4	35.6	40.855	<.001
	No						
Food (cooking and cuisine)	Yes	11.0	22.6	34.2	32.3	26.981	<.001
	No						
Arts and crafts	Yes	5.6	24.1	35.2	35.2	5.497	.240
	No	18.9	20.7	32.4	27.9		
Language classes	Yes	19.0	19.0	38.1	23.9	1.106	.893
	No	13.9	22.2	32.6	31.3		
Community meetings	Yes	7.4	19.4	36.1	37.1	17.990	.001
	No	28.1	26.3	28.1	17.5		

Cultural preservation

Participants were asked to indicate their level of agreement with different statements related to ways to ensure cultural preservation (Table 5), challenges they face in cultural preservation when in the host country (Table 6) and assess support services needed (Figure 1), using a five-Likert scale where 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree.

Ways to ensure cultural preservation

Findings (Table 5) indicate that the Ethiopian participants strongly agreed that enhancing pride in the cultural background (68.5%), celebrating Ethiopian traditions (65.5%), strengthening connections to roots (64.2%), connecting with

cultural heritage (59.4%), fostering a sense of belonging (58.8%) and meeting other Ethiopian diasporas (51.5%) are effective ways they ensure cultural preservation. These statements had the highest mode of 5 and mean scores ranging from 4.28 to 4.58. However, there was a low value for strongly agreeing (7.9%), a low mode of 1 and a low mean score of 2.42 for tourism promotion in Ethiopia.

Table 5. Ways to ensure cultural preservation (in %)
(Data source: Authors based on fieldwork)

Ways to ensure cultural preservation	1	2	3	4	5	Mean	Mode
Enhance pride in cultural background	0	1.2	7.9	22.4	68.5	4.58	5
Celebrate Ethiopian traditions	0	1.2	10.3	23.0	65.5	4.53	5
Strengthen connections to roots	0	1.8	10.3	23.6	64.2	4.50	5
Connect with cultural heritage	0	2.4%	10.3%	27.9	59.4	4.44	5
Foster a sense of belonging	0.6	1.2	17.0	22.4	58.8	4.38	5
Meet other Ethiopian diaspora members	0	1.8	19.4	27.3	51.5	4.28	5
Promote tourism in the home country	36.4	15.8	24.8	15.2	7.9	2.42	1

Notes: 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree

Challenges in cultural preservation

Respondents (as shown in Table 6) indicated by either agreed or strongly agreed that lack of awareness of cultural events (frequency=58.7%; mean score=3.56), language barrier (frequency=52.8%; mean score=3.16) and lack of time (frequency=55.2%; mean score=3.48) as the highest challenges they face in trying to preserve their culture. Distance from cultural events (frequency=35.8%; mean score=2.85) and the influence of South African culture (frequency=21.2%; mean score=2.27) were indicated as the least challenging factors.

Table 6. Challenges faced in cultural preservation (in %)
(Data source: Authors based on fieldwork)

Challenges	1	2	3	4	5	Mean
Lack of awareness of cultural events	4.8	17.6	18.8	34.5	24.2	3.56
Language barrier	20.0	14.5	12.7	35.2	17.6	3.16
Lack of time	5.5	13.3	26.1	38.2	17.0	3.48
Distance from cultural events	13.9	30.9	19.4	27.9	7.9	2.85
Influence of South African culture	40.0	21.2	17.6	13.9	7.3	2.27

Notes: 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree

Support services

Table 7 indicates that most participants strongly agreed that they need awareness of where Ethiopian cultural events are held (58.2%) and cultural exchange programs (52.1%). In contrast, 32.1% strongly disagreed that respondents need support with language classes.

Table 7. Support services (in %)

(Data source: Authors based on fieldwork)

Support services	1	2	3	4	5
Awareness of Ethiopian cultural events	1.8	7.3	9.7	23.0	58.2
Cultural exchange programs	4.2	9.1	18.8	15.8	52.1
Language classes	32.1	10.9	13.3	18.2	25.5

Notes: 1=strongly disagree, 2=disagree, 3=neutral, 4=agree, 5=strongly agree

Table 8 shows the results of the chi-square tests, which were performed to explore the relationship between challenges faced in cultural preservation and the support services required. The results show significant relationships between language barriers as a challenge and required support services like language classes (x^2=38.508, p=0.001), cultural exchange programs (x^2=42.627, p<0.001) awareness of Ethiopian cultural events (x^2=35.010, p=0.004); distance from cultural events. Significant relationships were also established between challenges of distance from cultural events and support of cultural exchange programs (x^2=30.921, p=0.014) and awareness of Ethiopian cultural events (x^2=33.588, p=0.006). Likewise, lack of awareness of cultural events had a significant relationship with the need for language classes (x^2=41.837, p<0.001), cultural exchange programs (x^2=57.286, p<0.001) and awareness of Ethiopian cultural events (x^2=31.142, p=0.013). A significant relationship was established between the influence of South African culture with the need for language classes (x^2=26.869, p=0.043), cultural exchange programs (x^2=68.048, p<0.001) and awareness of Ethiopian cultural events (x^2=62.158, p<0.001).

Table 8. Chi-square analysis of challenges faced in cultural preservation and support serves required

(Data source: Authors based on fieldwork)

Challenges	Support services	Chi-square value	Df	Sig. (p-value)
Language barriers	Language classes	38.508	16	0.001
	Cultural exchange programs	42.627	16	<0.001
	Awareness of Ethiopian cultural events	35.010	16	0.004
Lack of time	Language classes	20.668	16	0.192
	Cultural exchange programs	10.583	16	0.834
	Awareness of Ethiopian cultural events	18.886	16	0.275
Distance from cultural events	Language classes	19.309	16	0.253
	Cultural exchange programs	30.921	16	0.014
	Awareness of Ethiopian cultural events	33.588	16	0.006
Lack of awareness of cultural events	Language classes	41.837	16	<0.001
	Cultural exchange programs	57.286	16	<0.001
	Awareness of Ethiopian cultural events	31.142	16	0.013
Influence of South African Culture	Language classes	26.869	16	0.043
	Cultural exchange programs	68.048	16	<0.001
	Awareness of Ethiopian cultural events	62.158	16	<0.001

DISCUSSION AND IMPLICATIONS

The study aimed to investigate the motivational factors and explore how the Ethiopian community living in Johannesburg, South Africa, preserves their cultural heritage. Inspecting the demographic profile of the respondents showed more male respondents, aged 18-30 years, and had secondary/high school education. These findings align with previous studies, which showed that men are more likely to undertake risky migration journeys, which may stem from

African societal norms encouraging men to seek employment abroad to financially support their families, as they often exhibit greater risk tolerance for such perilous journeys (Lemma et al., 2024). Most Ethiopian migrants in South Africa are young adults seeking better opportunities due to high unemployment in Ethiopia (Estifanos and Freeman, 2022). The International Labour Organization (ILO), 2023) noted that individuals migrating for low-skilled labour often lack higher education, making many migrants self-employed and primarily engaging in the informal trading sector (Dori et al., 2024; Zhang et al., 2024). Many respondents have stayed in Johannesburg for more than ten years, aligning with those who state that many Ethiopian migrants have lived in South Africa since the early 2000s (Feyissa et al., 2023), resulting in many Ethiopian migrants establishing themselves in South Africa due to the established communities and social networks.

The study revealed that the top motivational factors for migration were better job opportunities and business or investment opportunities. Perhaps these findings are related to the Ethiopian migrants' view of South Africa as a land of employment opportunities due to the high unemployment rates in their home country (International Labour Organization (ILO), 2023; Megersa and Tafesse, 2024). Similar to Feyissa et al. (2023), who emphasised the critical role of social networks and showed that family connections provide essential support during the migration process, easing transitions and fostering community among migrants, this study found that joining family and friends is a strong motivational factor for migration.

The study further shows festivals and celebrations, religious ceremonies, traditional music and dance, food (cooking and cuisine) and community meetings as valuable platforms that enable the Ethiopians to express themselves culturally and have a community bond, reinforcing social ties and helping foster a sense of belonging conforming to Rahman et al. (2021). This is because religious ceremonies, central to Ethiopian identity, reflect the nation's long-standing Christian heritage (Sembiring, 2023), while cultural food (Rogerson, et al., 2024) and community meetings are vital for preserving cultural identity and addressing migrants' needs (Oladipo et al., 2022). The study revealed the need for awareness of where Ethiopian cultural events are held and cultural exchange programs correlating with Rutagand (2024). Even though no significant relationship could be established between cultural participation rate in arts and culture and language classes, it is important to note that some respondents indicated participating in these activities. Similarly, the study did not find language classes as a support mechanism needed by many. Perhaps language classes were taken by those born in South Africa.

The high frequency of cultural heritage, meeting other Ethiopian diasporas, celebrating Ethiopian traditions, strengthening connections to roots, enhancing pride in the cultural background and fostering a sense of belonging as ways of cultural preservation signifies the high popularity of cultural festivals and community gatherings. These findings align with Megersa and Tafesse (2024), who highlight how migrants maintain their cultural heritage and identity in South Africa and how important it is to maintain their cultural roots and community ties. However, the low mean score for tourism promotion in Ethiopia indicates a disconnect between migrants and the promotion of their home country's tourism industry, supporting Karagöz (2023), who found that visits to home countries are primarily for familial reasons rather than tourism. The main

challenges faced in participating in cultural events include a lack of awareness, time constraints, and language barriers. It is not surprising that time constraints emerged as a significant challenge, particularly since many respondents were self-employed. In addition, the respondents disagreed that the influence of South African culture poses a significant challenge to their cultural preservation efforts, indicating confidence in maintaining their identity despite external pressures. This finding contradicts Dejen and Tadese (2022), who noted restrictions faced by Ethiopian migrants in Saudi Arabia regarding cultural expression, where they were not allowed to express and practice Ethiopian religious beliefs, could not listen to Ethiopian music or wear traditional attire. The significant association established of the relationship between the challenges faced in cultural preservation and the support services needed supports the need for strategies to anchor cultural preservation in diaspora tourism, aligning with previous literature (Wahome, 2018)

Theoretical implications

This research adds to the literature on diaspora tourism, specifically in the context of motivational factors for migration and cultural preservation. These areas need constant literature updates due to increased globalisation and can guide future research. The study identified socio-economic (social and cultural connections, education, economic and career opportunities) and political (political instability, persecution) factors that drive Ethiopian migrants to Johannesburg. This contributes to the migration theory by emphasising the complexity of migration motivation. The study showed how actively Ethiopians participate in cultural activities, emphasising the importance of cultural identity in the African context. Moreover, the identified ways of cultural preservation and support services expand the literature on how diasporans utilise cultural resilience strategies to anchor cultural preservation, aligning with social integration, cultural resilience and transnationalism theories.

Practical implications

Cultural activities serve as important platforms for sharing stories, traditional music, dance, cuisine, and rituals, thereby ensuring that the richness of Ethiopian culture is not only celebrated but also passed down through generations. The study's demographic findings are vital for policymakers to establish targeted strategies that resonate with the demographic profile to promote cultural sustainability, continuity and community cohesion. Findings revealed the need for youth-centred cultural programmes to engage the Ethiopian youths through immersive-technology-driven cultural activities. Since the findings showed most respondents have secondary/high education, implementing education-based strategies such as integrating vocational skills like traditional arts and crafts and culinary practices can empower Ethiopians. Collaboration between community organisations and local institutions would help promote cultural exchange programs and enable intercultural understanding and appreciation between the Ethiopian culture and the broader South African community.

The study highlighted the cultural practices of Ethiopian migrants, which reinforce identity and solidarity within the diaspora. This allows individuals to feel rooted despite being far from home. Taking cognisance of these findings encourages initiatives that foster community engagement, such as having local

stakeholders host festivals to celebrate the Ethiopian heritage. Community centres and urban spaces in Johannesburg could be established as cultural hubs. This will assist in providing safe, secure and accessible locations for cultural exchanges. The promotion of 'inner-city' and 'off-the-beaten tracks' tours in Johannesburg has been argued as an innovative strategy that can be adapted to showcase Ethiopian cultures (Rogerson, et al., 2024). Online platforms (like social media) and community centres can be used to distribute information about upcoming events and cultural gatherings, ensuring that all diaspora members are aware of these festivals and celebrations. These efforts will solve the identified challenges, such as a lack of awareness of Ethiopian cultural events and cultural exchange programs, promote diaspora tourism and benefit the local economy.

It is clear from the study that there is a lack of promotion of Ethiopian culture to non-diasporans in Johannesburg. This implies missed opportunities for cultural exchange between diasporans and locals, while the Gauteng Tourism Authority (GTA) misses' opportunities to attract cultural tourists and investors. Furthermore, the study can serve as a foundation for developing policies to support the integration of Ethiopian migrants into South African society while promoting multiculturalism. This further contributes to achieving sustainable development goal 11 (SDG11-sustainable cities and communities).

CONCLUSION

The study investigated motivational factors and explored how the Ethiopian community living in Johannesburg, South Africa, preserves their cultural heritage. It concluded that Ethiopian migrants migrate to Johannesburg due to political, social, and economic motivational factors. Moreover, despite their challenges, they have successfully navigated their cultural preservation in South Africa by engaging in different popular cultural activities such as attending community meetings, traditional music and dance, festivals and celebrations, and arts and crafts, engaging in food (cooking and cuisine) activities, attending religious ceremonies and language classes. The study concludes that meeting other Ethiopian diasporas, celebrating Ethiopian traditions, strengthening connections to roots, enhancing pride in the cultural background and fostering a sense of belonging can be used to preserve culture. The study further concludes the need for support services such as creating awareness of where Ethiopian cultural events are held, cultural exchange programs and language classes and support mechanisms needed for engagement and promoting awareness of Ethiopian traditions within the locals and diaspora communities. The study discusses the theoretical and practical implications of the study and provides recommendations. Future research should expand their study area to include Ethiopian migrant communities in other South African cities and incorporate qualitative research methods such as focus group observations or in-depth interviews for in-depth comparative analyses that highlight varying individual experiences and strategies for cultural preservation. Furthermore, exploring the role of technology and how it influences cultural preservation among diasporic members can provide insights into modern methods of maintaining cultural ties.

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THE HUMAN PRESSURE IN THE APUSENI NATURAL PARK

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Abstract: The present study captures the pressure exerted by the population on the Apuseni Natural Park (ANP), from the perspective of the significant role of the human component in the conservation and development of these fragile areas from a natural and human point of view. The proposed study is focused both on the quantitative characteristics (general density, physiological density, pasture load) and on the quantitative ones (naturality index, human pressure through forestry), analyzed at the level of the ANP. The analysis of these indicators highlights the fact that, from the point of view of the human

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pressures exerted at the level of the ANP, it is not a strong one, and moreover it can jeopardize the optimal use of the potential of the ANP.

Key words: human pressure, Apuseni Natural Park, population density, naturality index, pasture load, forestry pressure

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INTRODUCTION

Until Romania's return to a democratic regime in 1989, there were occasional initiatives to create national parks, but none came to fruition. The most important of these initiatives occurred in the mid-1970s, when the state appointed the forest management specialist Zeno Oarcea to prepare the documentation for the declaration of the first national parks (Moş and Brînzan, 2024). Unfortunately, this further proposal for ANP again remained on paper, along with 12 other park proposals. In 1990, Order No. 7 was drawn up by the Ministry of Water, Forests and the Environment in an endeavour to create one or more national parks. This, however, failed to ensure all the legal conditions necessary to create the parks. Hence, the Apuseni park had to wait another ten years, until Law No. 5 of 2000, by which it was declared a protected area of national interest, but as a natural and not a national park, following the recommendations of the IUCN, notably because of the presence of human communities on its territory. This law established the surface area and the management category, but not the precise location and limits. For these to be agreed, there was a further wait, of three years, until Government Decision No. 230 of 2003, when the ANP finally came into existence, no less than 75 years after the first initiative. Also in 2003, Order No. 552 of the Ministry of Agriculture, Forests, Water and the Environment established the first (provisional) internal zoning of the ANP until the approval of the management plan by the Ministry of Agriculture, Forests, Water and the Environment in 2003 (Moş and Brînzan, 2024).

The ANP is a protected area of national interest, with a total area of 75,784 hectares, the third largest of Romania's 29 nature and national parks. It is categorized as a Nature Park to protect its landscape, which is the result of the long-term interaction between man and nature, equivalent to IUCN management category V. The ANP includes areas from 3 counties (Bihor, Cluj and Alba), and 17 territorial administrative units. One third of its territory belongs to the state. As the ownership of the remaining two thirds is in various other hands (including local communes, owners' associations and private individuals), biodiversity conservation is a great challenge for management (figure 1).

In 2004, the conditions were created for the establishment of the administrative structure and the operationalization of the ANP's management. The Ministry of the Environment decided that most parks would be administered and financed by the National Forests Administration – Romsilva, a structure within the same Ministry. The ANP Administration was created in 2004 as a unit within Romsilva; in addition, a Scientific Committee was established. This Scientific Committee has a guiding role in relation to the ANP Administration and supports management decisions. Alongside the ANP administration is the Advisory board, which is made up of key stakeholders. The Advisory board provides analysis, facilitates debate, and formulates proposals regarding the

management of the ANP. The ANP's ten-year management plans and the regulations are drawn up in collaboration with the Advisory Board, are then analysed and approved by the Scientific Committee, and subsequently given final approval by the relevant Minister.
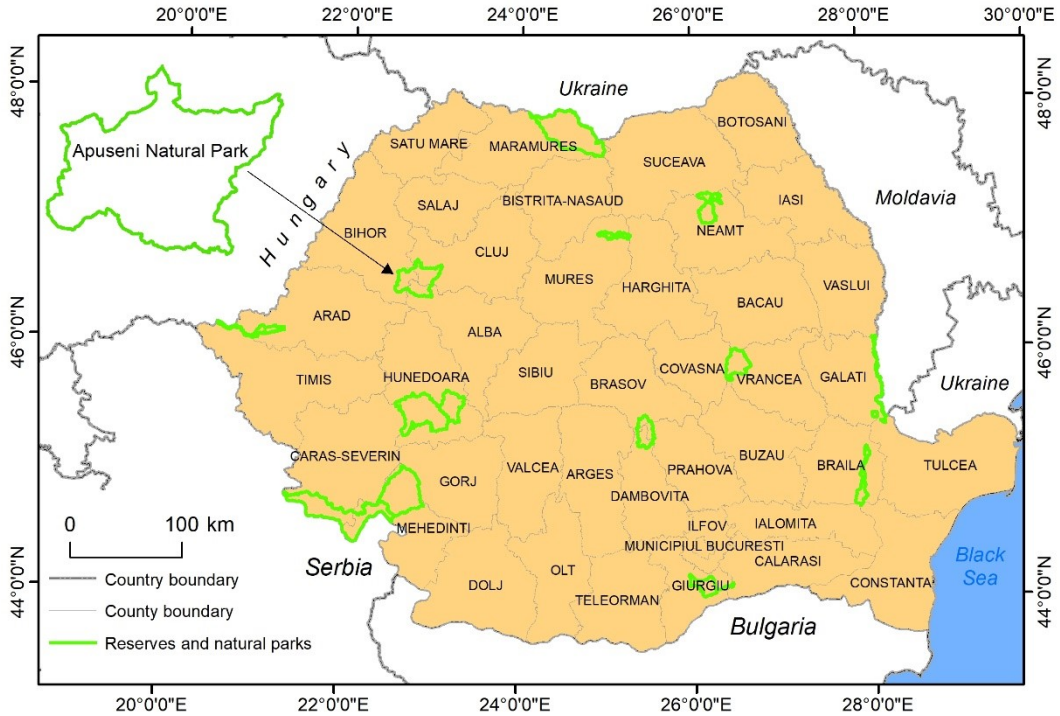

Figure 1. Areal study

The protection, conservation, development of mountain areas, especially the disadvantaged ones, are a major coordinate of the European Union's development policy. The concerns in the field of protection of mountain areas are with old traditions within the European states, reference being the legislation regarding the mountains developed by France and Italy (Borsdorf and Braun, 2009). In 1994 in Chamonix, France, the first European Conference of Mountain Regions was organized, sponsored by the Council of Europe, on which occasion the "European Charta of Mountains" was promoted. Subsequently, in 2003, in Quito, Ecuador, the "World Charta of Mountain Populations" was launched and approved by 40 states. The objectives stipulated in the two documents are the research of all existing components and resources, the conservation of the mountain environment seen as a mandatory condition for the survival of the global ecosystem (Rey, 2007).

The ESPON 2004 report on the mountain regions of Europe provides a pertinent snapshot of mountain areas. Chapter 5, Demographic Trends in Mountainous Regions, is devoted to human resources and the pressures they exert (IPCC Sixth Assessment Report, 2024).

In the 17 territorial administrative units (TAU) related to the ANP, there is a total population of 32,448 inhabitants. The basic component of the mountain

system, the population in this area faces a series of problems such as impoverishment, demographic aging and finally the exodus, all with repercussions on the ANP as well.

The characteristics of the ANP, the fragility and vulnerability of the mountain areas, are dependent on the pressure that the population, through its presence, the activities carried out exert on the mountain space (Moş and Brânzan, 2024). At the same time, it should be noted that the population is also dependent on the goods and services offered by this ecosystem. In parallel, the ANP puts pressure on the population through the legislative framework that stipulates the accepted economic activities and the limits within which they must fall. From the point of view of economic activities, specific to the communities in the area and which put pressure are especially animal husbandry and forestry. The two activities are those, taking into account the specificity of the ecosystem, which constitute the main components of human pressures and which can lead to the degradation of the mountain space.

One can say that this demographic component, as land managers, plays an important role in optimally capitalizing on the natural potential held by the ANP, preserving and maintaining biodiversity.

The study of mountain areas has aroused and continues to arouse the interest of researchers in various fields and geographers, in particular. In this regard, in direct connection with the proposed area, we mention the studies aimed at demographic risks in the Apuseni Mountains (Filimon and Filimon, 2011; Mureşan, 2014; Surd et al., 2007), population, settlements, tourist activities (Axinte et al., 2020; Boc et al., 2022; Filimon et al., 2011; Herman and Benchis, 2017; Herman et al., 2019; Ilieş et al., 2014; Lung and Gligor, 2018; Lung, 2019; Moş and Brânzan, 2024; Staşac et al., 2016), disadvantaged mining areas, with a focus on tourism development (Morar, 2012),

The main objective is to highlight the pressures exerted by the population on the Apuseni Natural Park. To achieve this objective, a few indicators considered relevant and frequently used in the literature have been selected (Goudie, 2006; Ianăş and Germain, 2018; Ionuş et al., 2011; Maruszczak, 1988; Manea, 2003; Pecher et al., 2018).

MATERIALS AND METHODS

To be able to capture the human pressure exerted, the indicators used are *population density* and *physiological density*, which highlight the pressure exerted on the entire area but also on the agricultural land. Another indicator is the pasture load with animals, an indicator that reflects the way in which the areas occupied by pasture are capitalized and if there is overgrazing. For this indicator we used the calculation formula established by the Ministry of Agriculture and Rural Development and which is based on the European regulations in this regard (Order 544, 2013). In order to highlight the current degree in which the ecological balance of the ANP is found, we used the *naturality index*, using the established calculation formula, I nat = (S forest/S total) x 100, where S forest is forest area in hectares, S total is total area in hectares, respectively the *human pressure (PUF)* exerted by the forest PUF= S forest/Number of inhabitants, where S forest is forest area in hectares.

Statistical information on population, total areas, forests, pastures, were obtained from the National Institute of Statistics, for the livestock, from the Veterinary Sanitary Directorates in Alba, Bihor and Cluj counties. Results

obtained (table 1) were correlated with the threshold values, to highlight the critical situations and cartographically represented using the ArcGis 10 software.

Table 1. Study indicators

	UAT	Inhabitans	Total Area (ha)	Forests (ha)	Density (inhabitants/km²)	Phisyological density (inhabitants/ha)	HPF (ha/inhabitants)	N.I (%)	LSU (LSU/ha)
1	Arieșeni	1846	5389	3039	19.9	0.6	3.0	60.6	1.2
2	Albac	1464	7322	4442	34.2	0.9	1.6	56.3	1.2
3	Gârda de Sus	1415	8270	5958	17.1	0.6	4.2	72.0	1.1
4	Horea	1774	6041	4389	29.3	1.5	2.5	72.6	3.7
5	Scărișoara	1391	9441	6947	14.7	0.7	5.0	73.5	1.1
6	Budureasa	2553	34646	20424	7.3	0.2	8.0	59.0	0.2
7	Buntești	4090	7386	2081	55.3	0.8	0.5	28.2	0.3
8	Câmpani	2111	4449	1911	47.4	0.9	0.9	43.0	1.1
9	Nucet	1987	4111	2951	48.3	2.3	1.5	71.8	0.2
10	Pietroasa	3014	20535	14785	14.6	0.8	4.9	72.0	1.2
11	Beliș	1008	20649	20424	4.8	0.1	9.1	44.5	0.2
12	Călățele	2307	7472	2081	30.8	0.5	0.8	23.8	0.9
13	Mărgău	1363	21168	1911	6.4	0.1	6.3	40.8	0.3
14	Mărișel	1499	8594	2951	17.4	0.3	2.5	44.2	1.0
15	Măguri Răcătău	2077	26895	14785	7.7	0.2	7.7	59.7	0.3
16	Râșca	1180	6565	2275	17.9	0.3	1.9	34.6	0.4
17	Săcuieu	1369	12112	2596	11.3	0.2	1.9	21.5	0.3
18	**ANP**	**32448**	**211045**	**113950**	**17.1**	**0.4**	**3.4**	**49.9**	**0.4**

RESULTS AND DISCUSSIONS

The naturality index is the one that highlights the degree of artificialization, the degree of affectation of the ecological balance in the Apuseni Natural Park. The values recorded by it differ from one administrative unit to another depending on the share that forests currently hold. The forest represents an essential component of the environment with profound implications for the protection and conservation of biodiversity (Andronache et al., 2019; Butchart et al., 2010; Edwards, 2017; Morales-Hidalgo et al., 2015; Schusser, 2013). Over time, the areas covered by forests have undergone profound changes, in the direction of their reduction and fragmentation, with profound implications for the reduction of biodiversity (Bakker et al., 2004; Diaconu et al., 2020; McAlpine et al., 2007; Niculae et al., 2016; Peptenatu et al., 2020, 2022, 2023). The factors that led to the reduction of forest areas were the need to identify new lands for agricultural activities (Fraser and Stringer, 2009) and human settlements (Dewan, 2009; Foley et al., 2005), the

demand for timber from the wood industry (Pintilii et al., 2017, 2015) the increase in population, etc. (van der Sluis et al., 2016).

Its average value is 49.9%, which means that overall, the analyzed area is in an ecological balance close to the initial one. Territorially, in relation to the recorded average, depending on the recorded values, there are three distinct categories, areas with strongly affected ecological balance, with values below 30%, areas with relative stable ecological balance, with values between 30%-50%, these two situations being present only in territorial units of Bihor and Cluj counties. The last category, those with an ecological balance close to the original one, defines all the communes in Alba County, three in Bihor and one in Cluj counties.

The first category, the areas where the ecological balance is strongly affected, the values of this index having values just over 20%. The three communes defined by this category are Bunteşti (Bihor) respectively Călățele and Săcuieu in Cluj County. Their presence in this category is generated by the fact that (figure 2) are located on the periphery of the ANP, and the forest area they own is relatively small in relation to the total area.
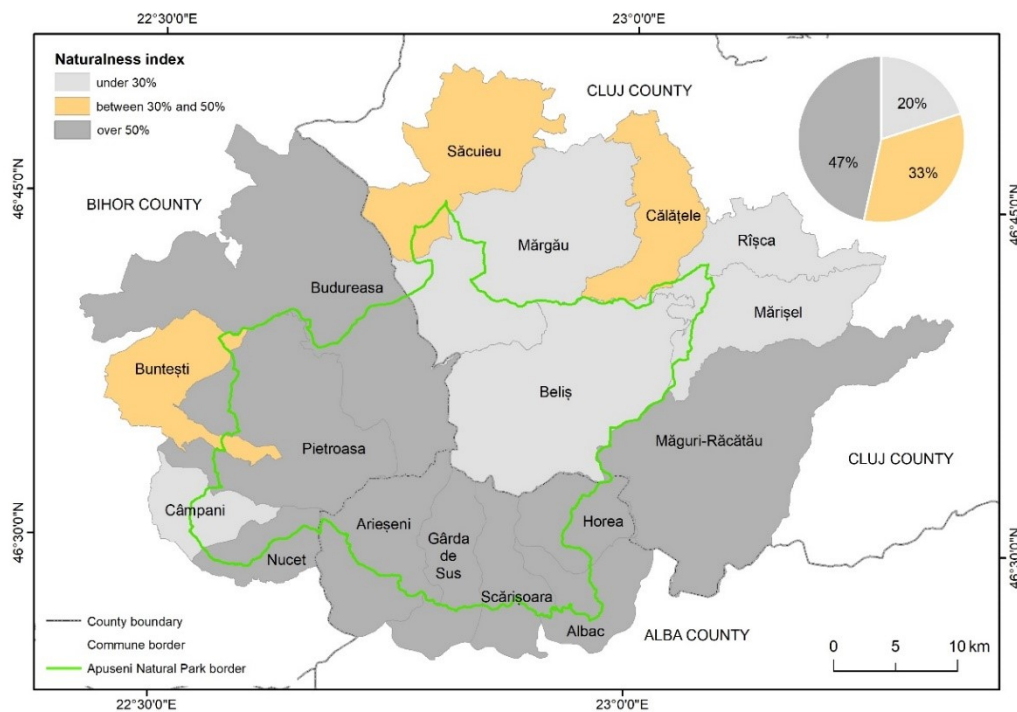

Figure 2. The naturality index within ANP

The second category, that of areas with relatively stable ecological balance, the values being close to 50%, includes a number of four territorial entities, three located in Cluj County, Beliş, Măriel, Râşca and one belongs to Bihor County, Câmpani commune. Except for Beliş commune, which has an appreciable forest area (approximately 10 000 ha), the others do not have a significant forest area.

The third category, namely where the ecological balance considered close to the original one, corresponds to a number of nine communes, distributed in all three counties. As we previously mentioned, this situation is present in all the communes of Alba County (figure 3) to which are added three units from Bihor (Budureasa, Nucet, Pietroasa) and one commune which belongs to Cluj County, Măguri Răcătău commune.

A fact worth mentioning is the high values of this index, over 70%, in a number of five communes: Gârda de Sus, Horea, Scărisoara (Alba County), Nucet and Pietroasa (Bihor County).

The human pressure through forestry index completes the naturality index because it highlights the anthropogenic intervention on the forest. If in the case of the naturality index the values are influenced by the total area of the commune, in this case, the demographic dimension is the one that has an important role. When this indicator has values above 2 ha/inhabitants, the system is able to preserve the relative balance of natural components.
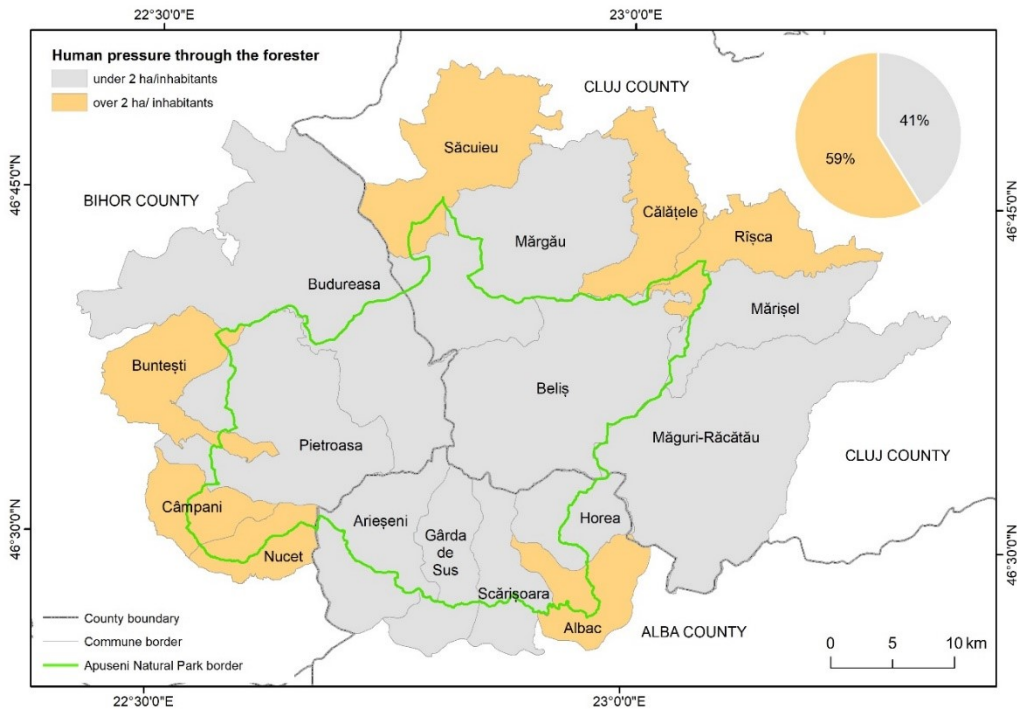

Figure 3. The human pressure through forestry index within ANP

The average value of this index within ANP is 3.4 ha/inhabitants, and it is closely related to naturality index. Situations in which this index has values below 2 ha/inhabitants is specific to a number of seven communes (figure 3) representing 41% of the total communes. The lowest values characterise communes of Buntești, Câmpani (Bihor), Călățele (Cluj) values below 1ha/inhabitants, characterise communes Albac (Alba), Râșca, Săcuieu (Cluj).

In the communes with an index of over 2 ha/inhabitants, 59% of the total communes, the values vary greatly from 2.5 ha/inhabitants. in Horea commune,

to over 6 ha/inhabitants in communes such as Beliş, Mărgău, Măguri Răcătău (Cluj), Budureasa (Bihor), the maximum value recorded being 9.1 ha/inhabitants in Beliş commune.

Population density is an indicator that highlights the physical pressure exerted by the population on a territory. In the case of the present study, this indicator is in close correlation with the characteristics of the support component, namely mountain area with a higher livability potential, more attractive for the population, as well as areas with a modest capacity, and whose attractiveness is more limited or even becomes restrictive (Filimon, 2012; Ropa, 2020; Surd et al., 2007). The values of population density and physical pressure exerted by the population in the case of the studied area are directly influenced by the demographic size of the settlements located in the Apuseni Natural Park, the most numerous small settlements, and the area related to each TAU. If in the case of the demographic dimensions of the settlements the values are relatively approximate, the same cannot be said in terms of their area. The analysis of this indicator highlights the fact that the degree of anthropization is low, the average density value being 17.1 inhabitants/km², but explainable given the fact that it is a mountainous area par excellence.
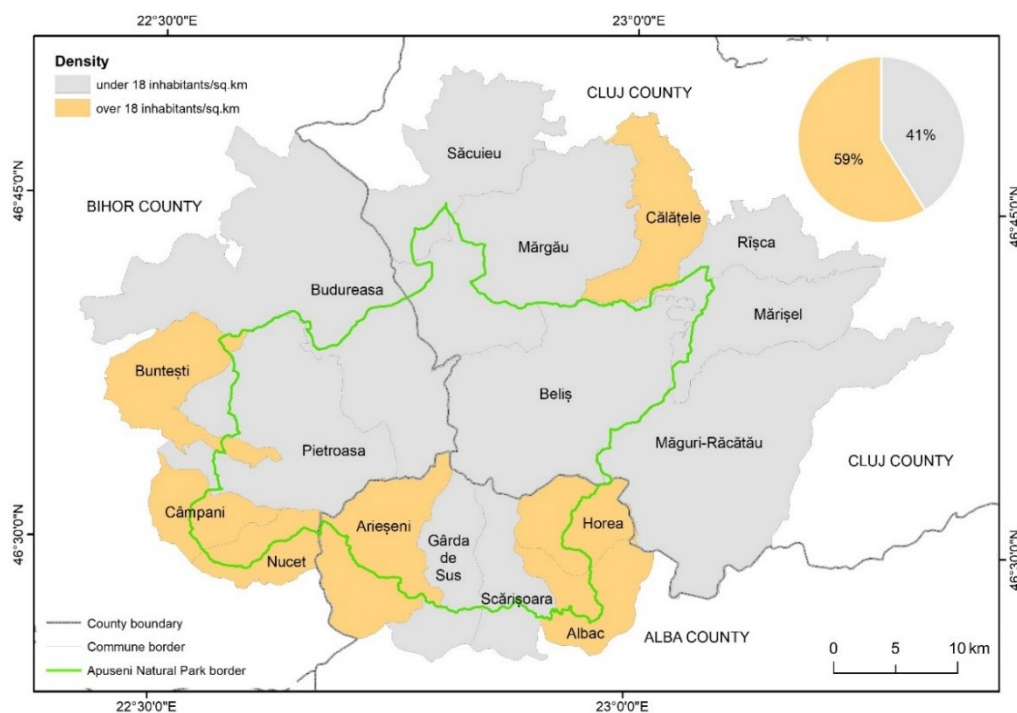

Figure 4. Population density within Apuseni Natural Park

At the territorial level, compared to the average value, there are particular situations, in the sense that 59% of the communes are characterised by values above the general average, within which stand out communes such as Bunteşti 55.3%, Câmpani and Nucet town 48%, located on the territory of Bihor County, Călățele 30% in Cluj County and Albac, with 34%, in Alba County (Figure 4). At

the opposite side, with low population densities, are the communes of Beliş 4.8%, Mărgău 6.4%, Măguri Racatau, 7.7% in Cluj County and Pietroasa 7.7% in Bihor County. The low population density values in these communes are the result of the large area they have. The other TAUs are defined by values close to or slightly above the general average.

The physiological density highlights the anthropogenic pressure exerted on the agricultural area, which represents the support of human activities, provides part of the living needs on the side, but also highlights the potential for maintenance and valorization of agricultural land. Similar to the general density, this is also influenced by the demographic size and the agricultural area of each community.
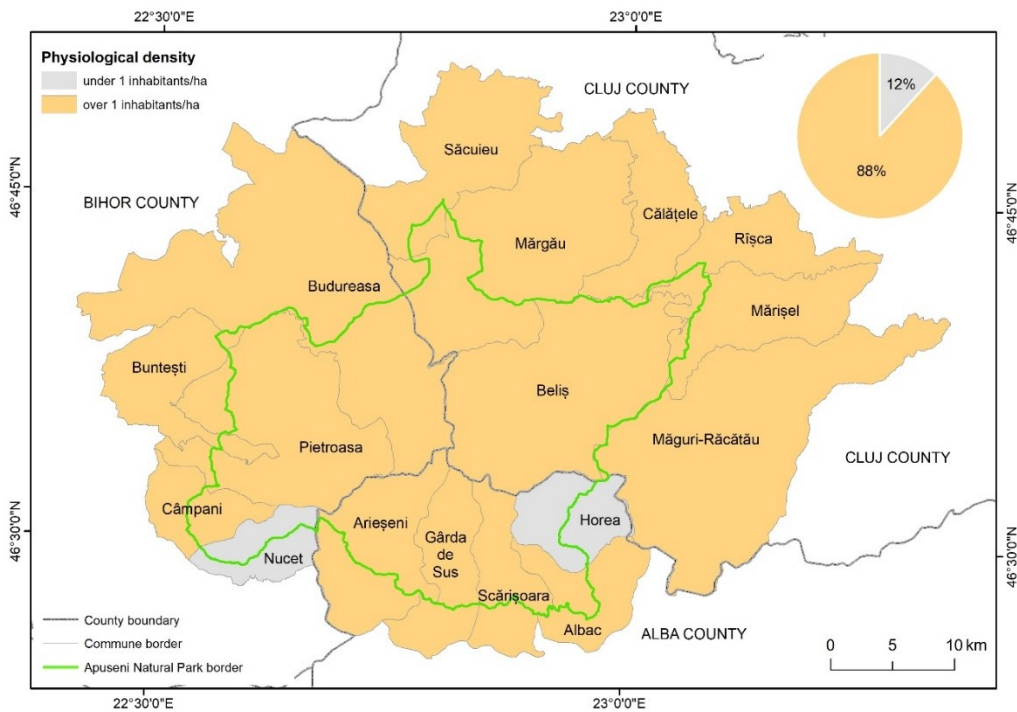

Figure 5. Physiological density within Apuseni Natural Park

As can be seen (figure 5), the values of physiological density are not high, the average value recorded being 0.4 inhabitants/ha. The values vary between a minimum of 0.1 inhabitants/ha in the communes of Beliş, Mărgău (Cluj), the maximum value being returned to the city of Nucet (Bihor) with 2.3 inhabitants/ha, as a result of the small agricultural area it has. Otherwise, the values broadly follow the values of the general density, the communes with higher density having also higher values of the physiological density.

Through its values, the physiological density highlights the fact that, even if it is a mountainous area, the potential for capitalization and maintenance of the agricultural area is reduced.

The human pressure exerted by animal husbandry (UMV pasture load/ha), represents, from the point of view of the population's activities, we believe, the

greatest pressure exerted on the Apuseni Natural Park. Even if, in the last period, this occupation has also suffered because of socio-economic, human, legislative changes, it remains the main occupation of the human communities in this area.

Animal husbandry, especially cattle and sheep, is a tradition within the communities related to the study area. The area occupied by pastures totals over 56,000 ha, naturally unevenly distributed within the TAUs. With large pasture areas, the communes of Beliş, Mărgău, Măguri Răcătău, Săcuieu (Cluj), Budureasa (Bihor) stand out, where they exceed 6,000 ha. With smaller pasture areas, under 1000 ha there are the communes of Câmpani, Nucet city (Bihor), Albac, Gârda de Sus, Horea (Alba).

In relation to the related pasture area, numerous herds of animals, cattle have the communes of Albac, Arieşeni, Gârda de Sus, Horea and Scărişoara (Alba), cattle and sheep Budureasa, Câmpani, Pietroasa (Bihor). The communes in Cluj County stand out especially for the larger herds of sheep to which are added cattle. The composition of the herd leaves its mark on pasture loads with UMV, given that the calculation methodology for sheep and cattle differs according to the legislation.

Following the calculation of pasture loads, according to the legislation in force for both sheep and cattle and the correlation with the minimum necessary (0.3UMV/ha) for the efficient use of pastures at the level of the ANP, the average UMV/ha load is 0.4UMV/ha. This value places the area close to the minimum mandatory value for adequate pasture maintenance and at the same time is in line with the desire and recommendation of the ANP Administration, through the management plan, not to exceed the value of 1 UMV/ha.
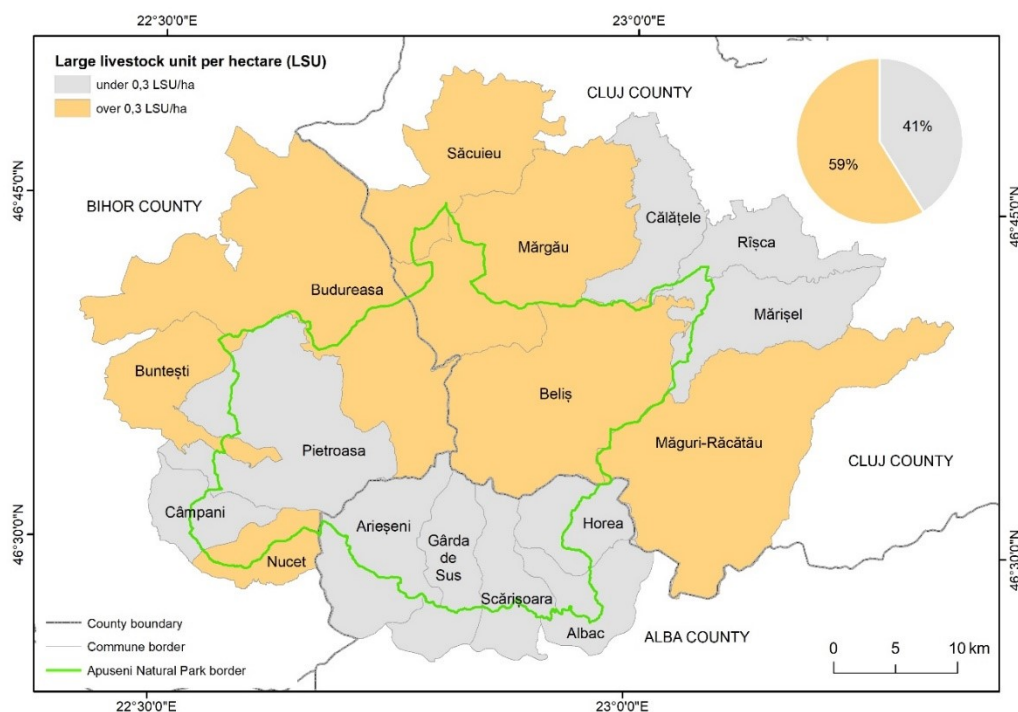

Figure 6. UMV pasture load/ha in the ANP

As can be seen from (figure 6), within the park there are communes where the average value, but also the one agreed by the park is exceeded. In this situation are all the communes in Alba County, the maximum value being in Horea commune where it is 3.7 UMV/ha. This value is generated by the relatively small area of pastures (315 ha) compared to the number of animals.

Values that exceed the minimum value and reach the target recommended by the ANP, are recorded in Câmpani and Pietroasa communes in Bihor County, while in Budureasa commune the value is below the minimum. Similar situations are also encountered within the communes of Cluj County where, except for Săcuieu commune, with a value below 0.3UMV/ha, the others are close to the value of 1UMV/ha.

CONCLUSIONS

The analysis of human pressures within Apuseni Natural Park, through the indicators used, allows us to draw an overall picture and highlight some significant aspects regarding its degree of artificialization and anthropization.

Thus, the low values of the general density and the physiological ones highlight the fact that, from this point of view, there is no high physical pressure within the area. On the other hand, these values also reveal the fact that, in the long term and depending on the evolution of the population within the TAUs, problems may arise in terms of depopulation.

The phenomenon of depopulation entails the appearance of dysfunctions in the management and optimal capitalization of the natural and economic potential, with negative effects on future evolution.

In fact, the pressure exerted by the population on the park, highlighted by the basic economic activity, animal husbandry, also highlights a poor use of the land occupied by pastures, below their potential. The use of pastures below their potential has repercussions on their quality and even their abandonment. Exceptions are the communes in Alba County where the pressure on the pastures is slightly higher, exceeding the value agreed by the park administration, but not the potential to sustain the pastures.

The naturality index, the pressure through forestry highlights the fact that we can talk about a space where the ecological balance, for the moment, is little affected. At the same time, several territorial units the natural components are affected, the ecological balance being fragile or affected. In this situation there are several communes in Bihor County (Buntești, Câmpani) and Cluj (Călățele, Săcuieu).

Through the values of these indicators and their correlation with the threshold values, those that highlight the artificialization processes, we can appreciate that, at least for the moment, the human pressure exerted on this area is not a strong one, the degree of naturalness of the Apuseni Natural Park being still high.

The fact that the human pressure is not strong highlights a worrying aspect, namely the fact that from a human point of view, the demographic dimension of the communities, the agro-pastoral activities practiced, are below the support capacity of the Apuseni Natural Park and implicitly the inability to make optimal use of it.

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FOOD AS A CRITICAL METAPHOR FOR GLOBALIZATION: SPAZIALIZATION OF TERRITORIAL IMBALANCES. EVIDENCE FROM THE GLOBAL SOUTH

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Abstract: The purpose of this paper is to represent the spatialisation of the geography of hunger at the national level, taking as its starting point the most alarming situations denoted by the Global Hunger Index (GHI). After identifying the countries that persist in the most severe conditions of food insecurity, the causes that most influence these situations are highlighted, also through the use of specific indicators. Globalisation not only brings the benefit of a global approach to issues of universal solidarity (albeit still feeble in its concrete effects), but also many issues that aggravate the already difficult local situations.

Key words: Hunger, food security, globalization, territorial imbalances, Global Hunger Index, polycrisis, food policies

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INTRODUCTION

The issue of food security - a definition coined at the 1996 World Food Summit[1] and understood in its original meaning as the ability of countries to meet their own national needs - has always accompanied human history as a universal issue, even though, starting after the Second World War, adherence to the monolinear paradigm of modernization based on processes of agricultural industrialization and entrepreneurial approaches to land management ended up shifting the issue of food security from the national to the global scale (Maxwell, 1996; Patel, 2009) and to regionalize the issue of hunger, returning even today a geography of poverty that responsibly questions the whole of humanity.

In the aftermath of the Second World War, while the UN (1948) sanctioned food as a fundamental right guaranteed at international level[2], a predictive volume by Josué De Castro *Geopolitique de la Faim* (1952) was published, which posed the problem of hunger in a geopolitical key, disavowing any neo-Malthusian derived interpretation, linked to the lack of land and/or the ability to increase food production, even in the face of a forecast of exponential population growth. For De Castro, however, "*la question est également de savoir si les gouvernements voudront bien coopérer à un plan d'alimentation mondiale. Un tel plan est le seul moyen de libérer le monde de la misère matérielle*" (p. 11).

The theme of cooperation invoked by De Castro, however, ended up incorporating the principles of the new world order defined at Bretton Wood in 1944 and translated into the export of the Western liberalist development model supported by the strategy of Structural Adjustment Plans and interpreted in agriculture through the Green Revolution (Patel, 2013) that will impose on a global scale the model of utilitarian agriculture through the export of food aid and agronomic and production techniques (hybrid seeds, pesticides, fertilizers, irrigation systems, mechanization). This will result in a clear commercial dependence of the countries of the global South on those of the capitalist North and the gradual transformation of subsistence agriculture on a family basis into industrial agriculture oriented in particular towards exports. In the face of initial positive results recorded in terms of a doubling of production per hectare with regard above all to the cultivation of rice in Asia and maize in Central America, this model will end up accounting for a series of environmental and social vulnerabilities, causing the progressive impoverishment of soil fertility (due to salinization and increasing erosion) in the loss of biodiversity (as a consequence of monoculture practices), in the destructuring of traditional peasant agriculture (unable to compete on the market due to high production costs and the indebtedness resulting from the import of production inputs), effectively increasing food insecurity because of the weakening of the self-supporting food process.

This scenario has been further aggravated by the combined effects of pandemic and climate crisis, and the Russian-Ukrainian war (see below), where the role of food as a geopolitical weapon has been clearly confirmed (Segrè, 2023), reinforcing an interpretation that, starting from the new millennium, has found in land grabbing a further process of economic-financial and geopolitical hegemony

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[1] "Food security exists when all people, at all times, have physical and economic access to sufficient, safe and nutritious food that meets their dietary needs and food preferences for an active and healthy life" (Rome Declaration on World Food Security available at https://www.fao.org/4/w3613e/w3613e00.htm)

[2] Art. 25 of the UN Universal Declaration of Human Rights.

fuelled by rich countries to the detriment of peasant communities in the countries of the South, giving rise to a renewed form of neo-colonialism (Hall et al, 2015). The effects are aggravated when land grabbing translates into an instrument of land financialization functional to capital in order to escape the crisis and the fluidity of a (de)globalized economy in search of new privileged assets (*friendshoring*) or into an investment in environmental protection with the spread of no-food crops, such as biomass for biodiesel and bioethanol (Grillotti Di Giacomo, 2018-2019).

Then, the clash between the right to the land (and food) of those who live on it and the highly polarized economic and political interests in the hands of a few financial groups (IPES-Food, 2017) forcefully revives the theme of food sovereignty as enshrined in the Nyéléni Declaration of 2007 according to which "*Food sovereignty is the right of peoples to healthy and culturally appropriate food produced through ecologically sound and sustainable methods, and their right to define their own food and agriculture systems. It puts the aspirations and needs of those who produce, distribute and consume food at the heart of food systems and policies rather than the demands of markets and corporations*". Such an approach overturns the neo-liberal and market-technological approach at its roots to revive the very idea of food to be valued as a *common*, i.e. as a good of collective interest, and no longer as a commodity, and to re-centralize the issue of land ownership and the role of labour with the just remuneration to be ensured to farmers (Sinatti, 2021). Objectives that refer to the role of governments in safeguarding human rights and in the development of legal frameworks and innovative guidelines to strengthen land governance at an international and national level[3], together with the need to consolidate a new approach to international cooperation based on economic inclusion through strategies to counter the concentration of wealth and the support of territorial agricultural systems aimed at productive diversification also through forms of solidarity-based economy to the benefit of the most fragile rural populations and with a view to ecological transition (Giunta and Pettenati, 2024).

In fact, however, the process of commodification of a right such as that of food, consequent to the consolidation of an active globalization in an economic-financial key, still confirms all its gravity and stands as a critical voice denouncing the malfunctioning of the globalized economic system. The latest official data available[4], in fact, estimate 733 million people suffering from hunger and 2.4 billion people inadequately fed, with forecasts to 2030 confirming a hunger condition for 600 million people, thus calling into question the achievement of Goal 2 (Zero Hunger) of the 2030 Agenda.

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[3] As in the case of the Voluntary Guidance Guidelines on the Responsible Governance of Tenure of Land, Fisheries and Forests in the Context of National Food Security (VGGT) developed by FAO and endorsed by the Committee on World Food Security in 2012. The purpose of the guidelines is to "*serve as a reference and provide guidance for improving the governance of tenure of land, fisheries and forests with the overall objective of achieving food security for all and supporting the progressive realisation of the right to adequate food in the context of national food security*". However, a recent study by Land Matrix found poor implementation of VGGTs in Large-Scale Land Agreements (LSLAs) in the 23 African countries considered in the report (Stocchiero, 2023, p. 9).

[4] The figure for the number of hungry people in the world (733 million) refers to the Global Hunger Index 2024 (Wiemers et al., 2024); while the number of people who are not adequately nourished (2.4 billion) is a figure from: FAO, IFAD, UNICEF, WFP and WHO, *The State of Food Security and Nutrition in the World 2023. Urbanization, agrifood systems transformation and healthy diets across the rural–urban continuum*, Rome, FAO, 2023.

Behind these data, the aim of our research work, aimed at spatializing a geography of hunger which, even within the interpretative limits referable to a national scale of reading, is to reiterate the urgency of an issue that is increasingly complex and less and less permeable within the sole sphere of agricultural-rural dynamics to assume the role of weak link in the chessboard of the broader global competition for resources, highlighting the weaknesses of the various policies implemented by numerous global actors (FAO, UN) and responsibly questioning all humanity called upon to rethink a new approach to international cooperation.

THE GLOBAL HUNGER INDEX (GHI): DEFINITION AND SPATIALIZATION

The FAO defines hunger as that severe discomfort caused by a lack of sufficient calories, highlighting its multifunctional nature. It speaks of malnutrition, meaning a chronic pathological condition in which an individual does not receive the correct amount of nutrients, either by default (scarcity) or by excess (abundance). Malnutrition by deficiency - typical of the world's lowest income countries - gives rise, in turn, to two dramatic conditions: undernourishment, which implies an insufficient intake of calories for an individual to obtain the minimum amount of energy for a healthy and productive life in relation to gender, age, stature, and level of daily physical activity; and undernutrition, which instead goes beyond calories consumption, and takes into account the lack of essential nutrients, including proteins, vitamins, and minerals, useful for the growth, in the first stage of life of children (see below). In this case, an assessment is made not only from the quantitative point of view of the food consumed, but also from a qualitative point of view, and concerns above all contexts in which there is family food insecurity, partly due to the poor health of the mother, partly from the conditions of poverty linked to insufficient access to health care, lack of safe water or sanitation facilities. On the other hand, malnutrition by excess, overnutrition, leads in any case to an incorrect intake of calories in relation to daily requirements, in this case so excessive as to lead to severe health problems and the development of certain diseases such as obesity (Wiemers et al., 2024).

One of the most widely used instruments for the study of hunger is the Global Hunger Index (GHI). It is an index consisting of four indicators, which take into account the multifunctional nature of hunger:

-undernourishment, previously defined, affecting adults and children;

-child stunting, i.e. the percentage of children under the age of five with insufficient height for their age (chronic undernutrition);

-child wasting, which refers to the percentage of children under the age of five who are underweight for their height (acute undernutrition);

-child mortality, which measures the dramatic combination of inadequate nutrition and survival in unhealthy environments.

These indicators contribute in different ways to forming the index; undernourishment and child mortality each weigh in at one-third, while stunting and child wasting each weigh in at one-sixth. The values are then given a score standardized in excess of the highest global levels of that indicator, and aggregated together, resulting in a GHI score for each country on a 100-point scale, ranging from a minimum, "low" level ≤ 9.9, passing through a "moderate" level from 10 to 19.9, "serious" level from 20 to 34.9, "alarming" level from 35 to 49.9, up to a maximum, "extremely alarming" level, equal to or greater than 50. According to the latest available data, referring to the period 2019-2023, the world-wide GHI

2024 is 18.3, so a significantly "moderate" level (GHI 10.0-19.9), affecting about 733 million people (Wiemers et al., 2024).

However, it should be noted that while the calculation of the Index is based on all four indicators shown, the choice of significant countries to consider upstream is based on only two of the four indicators, that is undernourishment and child mortality; in fact, only countries that have presented a threshold value over the "very low" level for one or both indicators since 2000 are included. Especially when faced with situations of extreme poverty, the reliability of the other two indicators is partially compromised by the variable availability from country to country, as well as the poor availability of this type of data in some countries. It should also be noted that certain types of territories cannot be included in the GHI calculation, such as not independent territories or those with a population below 500.000, precisely because of the scarcity of available data of the two threshold indicators. Clearly, the calculation of the Global Hunger Index does not include either the so-called countries of the North of the World, those with the highest income, including the United States, Canada, Europe, Japan, Australia and New Zealand.

In general, if there is incomplete data for a country, forecasts are made to calculate the GHI level, taking into account certain known data such as "*those GHI indicator values that are available, the country's last known GHI severity designation, the country's last known prevalence of undernourishment, the prevalence of undernourishment for the subregion in which the country is located, and/or assessment of the relevant findings of the 2022, 2023, and 2024 editions of the Global Report on Food Crises*" (Wiemers et al., 2024, p. 41), the latter focused on acute food insecurity.

Until 2016, there was, globally, a significant reduction in hunger levels (going from a serious GHI score of 28 in 2000, to a moderate score of 18.8 in 2016), such that the 7 countries with an extremely alarming GHI saw their index fall to the lower, alarming level; from 2016 to the present, however, there has been a sudden global slowdown (only falling from 18.8 to 18.3), if not worsening, in some cases, hunger levels.

The dramatic situation on a global level is attributable to the phenomenon that has been defined as *polycrisis* (World Economic Forum, 2023), the result of the coexistence of different forms of criticality, which are increasingly interlinked, such as the dynamics connected to climate change, resource dynamics, consequent socio-economic and geopolitical repercussions, socio-political tensions, and in the worst cases, wars, displacement and humanitarian crises, which have been exacerbated by the recent Covid-19 pandemic and the Russian-Ukrainian and Middle-East war. This is an increasingly difficult condition to deal with, especially for those countries that already have a strong state of fragility, internal inequality, territorial imbalances and a governance incapable of reacting to global shocks.

The current global scenario, of great instability, presents itself with characteristics of extreme complexity: it is in fact an interconnected set of crisis situations and consequent global risks on several fronts, lasting over time and destined to have future repercussions, encapsulated in the terms *permacrisis* (Brown et al., 2023) and *polycrisis* (Albert, 2024) used, as written, by the Global Risks Report 2023. In addition to analysing the correlation between the different risk categories - in parallel with contrasting global population growth - the Report

attempts to identify five main risk categories - economic, environmental, geopolitical, social and technological - which in turn are expressed in various types of crises (Figure 1).
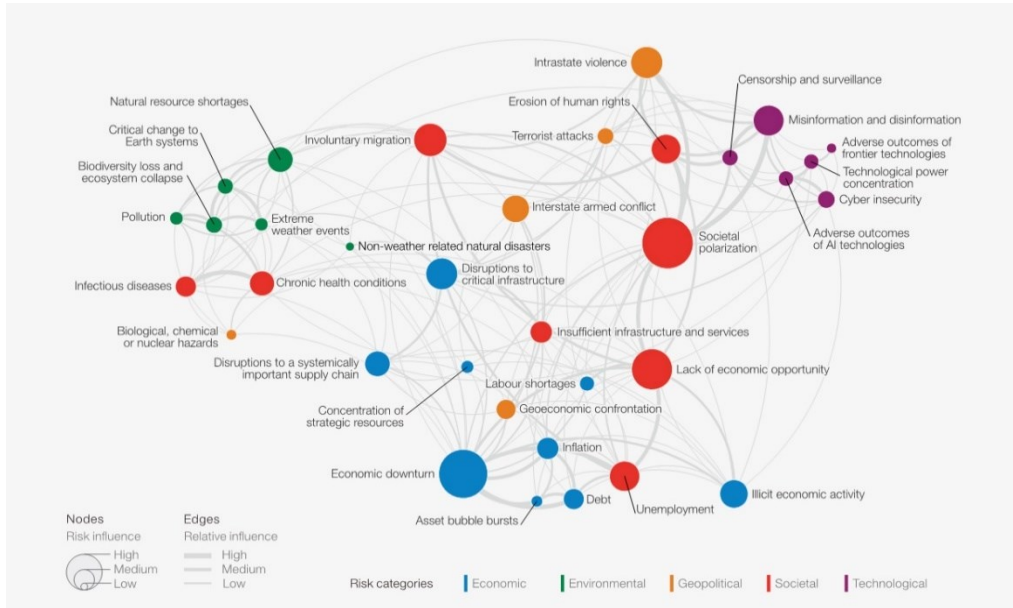

Figure 1. Global risks categories landscape and interconnections
(Source: World Economic Forum Global Risks, 2023, p. 10)

Figure 2 shows precisely the slowdown in the reduction of GHI scores of the various countries in the world with levels of hunger to be included in the Index calculation in recent years; however, it can be seen that most of the countries are included in the central band of the graph, which collects data on "less hunger reduction", underlining a general situation that is still very far from the "Zero Hunger" objective proposed by the 2030 Agenda. It is not surprising, also, to note the aggravated situation of some countries such as Syria – torn by years of war – or Venezuela – on the verge of economic collapse – both in serious humanitarian crisis; as the situation remains dramatic of 6 countries - most of them in Sub-Saharan Africa and one in Western Asia - that have alarming levels of hunger, remains dramatic.

The macro-regional scale histograms (Figure 3) confirm, in fact, the dramatic GHI levels for Sub-Saharan African (GHI 26.8) and South Asian (GHI 26.2) countries, which, although they saw a significant reduction up to 2016, still unfortunately have values considerably above the global value of 18.3. The global situation is confirmed in Figure 4, in which it is immediately apparent that Africa, particularly the Sahelian and Sub-Saharan belts, is the most compromised continent, with five countries presenting *alarming* levels, Chad, South Sudan, Somalia, Burundi and Madagascar, in addition to Yemen for Asia, a country strongly conditioned by adverse geopolitical conditions.
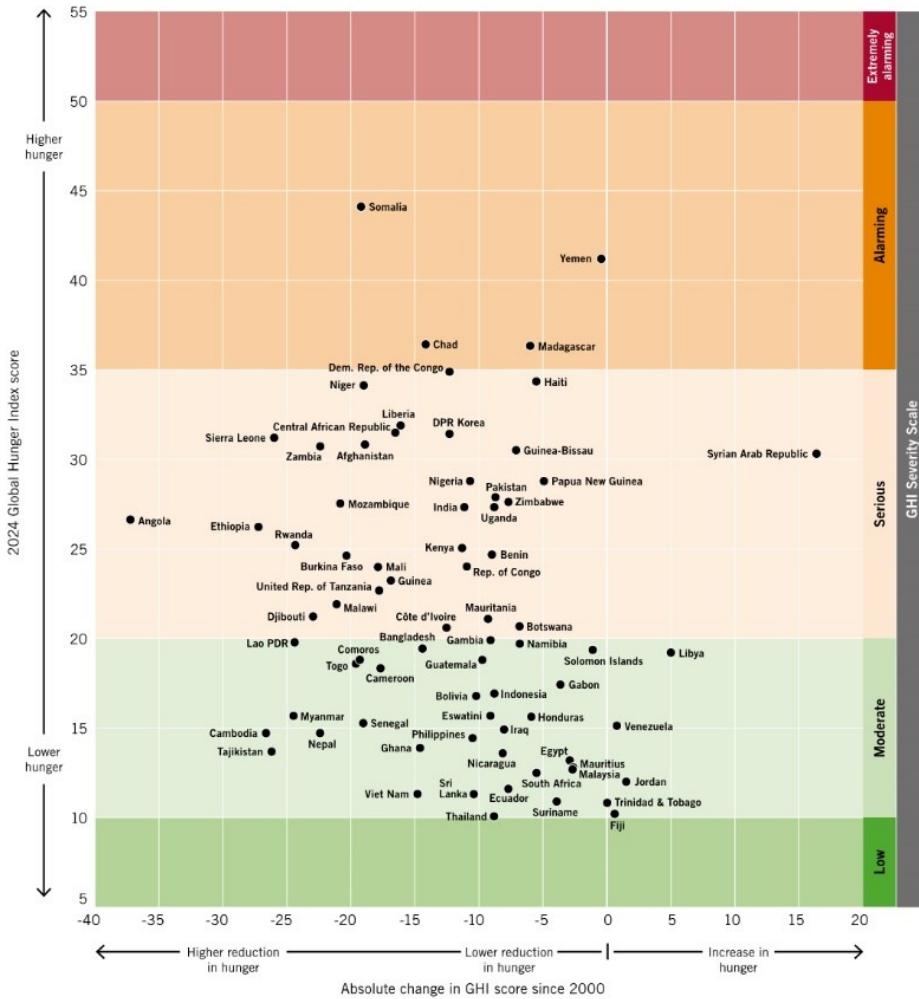
Figure 2. Evolution of world hunger levels since 2000
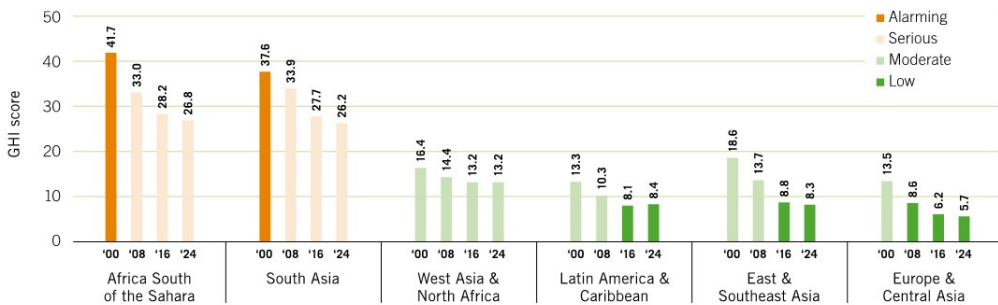(Source: Wiemers et al., 2024, p.14)

Figure 3. GHI scores by macro-region since 2000[5]
(Source: Wiemers et al., 2024, p. 11)

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[5] As mentioned, the calculation of the GHI does not include the so-called countries of the Global North, so where it says 'Europe', it means Eastern Europe.
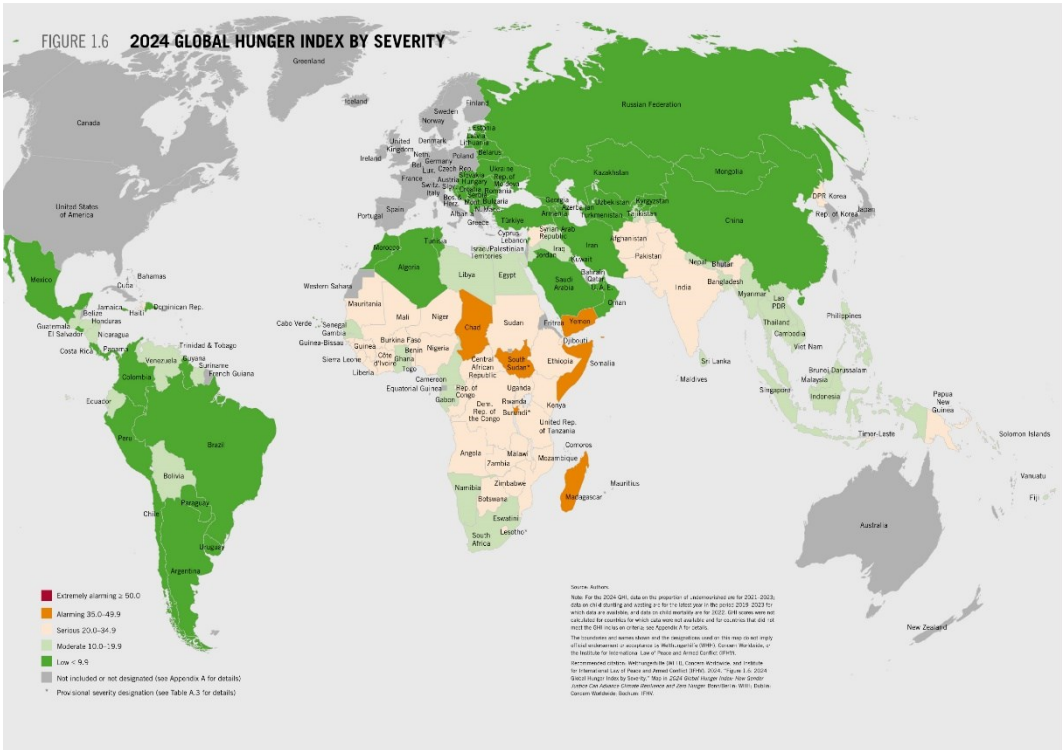
Figure 4. GHI in the world
(Source: Wiemers et al., 2024, pp. 22-23)

THE SPAZIALIZATION OF CASE STUDIES

The study will focus on the evidence of the case studies of countries that are particularly significant in terms of hunger levels. In addition to the 6 countries identified by the GHI 2024 Report as *alarming* - Chad, South Sudan, Somalia, Burundi, Madagascar and Yemen - we chose to consider other countries with critical situations such as Lesotho, the Democratic Republic of Congo, the Central African Republic and Mozambique, which present a *severe* GHI 2024, but which have - based on the reconstruction of the data - a strongly *alarming* history (Table 1).[6]

Moreover, in line with the risk categories identified by the Global Risks Report (paragraph 2), this paper aims to highlight the common types of crises found in all the case study countries. A transversal reading emphasizes that, in recent years, the common thread underlying the further worsening of the already high levels of food insecurity in these countries has been, on the one hand, the Covid-19 pandemic, and, on the other, the Russian-Ukrainian and Middle East wars - situations which, in addition to causing a large number of deaths, have also caused the interruption of important supply chains.

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[6] While it is not possible to compare each report with previous years' reports - because data is improved from time to time by UN agencies and, even more so, because the methodology has been changed over the years to include data for some indicators (Wiemers et al., 2024, p.43) - the countries that, as of today, present a GHI 2024 forecast, have been compared with data from previous Reports; in particular, the 2023 Report shows an alarming forecast for South Sudan and Burundi, and an alarming figure (of 35.5) for Lesotho (Wiemers et al., 2023, p.13).

Table 1. GHI reconstruction by case study
(Data source: own elaboration from Wiemers et al., 2024)

#	COUNTRY	GHI 2000	GHI 2008	GHI 2016	GHI 2024
1	Somalia	63,3	59	49,8	44,1
2	Yemen	41,6	36,8	39,6	41,2
3	Chad	50,5	44,8	38,8	36,4
4	Madagascar	42,3	36,6	33,2	36,3
5	Dem Rep of Congo	47,2	41,2	36,2	34,9
6	Central African Republic	48	43,5	32,6	31,5
7	Mozambique	48,3	35,6	38,5	27,5
8	South Sudan	n/a	n/a	n/a	35-49,9
9	Burundi	n/a	n/a	n/a	35-49,9
10	Lesotho	n/a	n/a	n/a	20-34,9

First and foremost, there is an *environmental* problem, for these territories are already heavily subjected to extreme weather phenomena that climate change has helped to amplify. The vertiginous rise in global temperatures has led to a progressive worsening of the climate over the years, with heavy rains, floods, tropical cyclones and soil erosion on the one hand, and droughts, fires and sandstorms on the other. The climate crisis is certainly one of the most worrying issues for those areas of the world that are particularly weak and with high levels of poverty, such as the African continent. It is also the cause of the unproductivity of the land, eventually aggravating the already dramatic lack of food and drinking water availability, as well as being the cause of mass population displacements. In detail, we would like to mention a few significant cases, such as Somalia, which has been hit by years of drought with the consequent risk of famine, and subsequent violent flooding, triggered by the El Niño climate phenomenon, a phenomenon that has also severely affected Lesotho and Mozambique, bringing these countries into an alarming situation that has further intensified the decline in agricultural productivity in recent years (Singh et al., 2023). Yemen is also one of the countries most affected by extreme weather phenomena, including the issue of prolonged droughts to the point of desertification. In this territory, the water problem has been known for a long time, due to the aquifers that are heavily exploited for agricultural use in a context that is increasingly suffering from rising temperatures and recurring droughts, which climate change is further exacerbating (Khalil and Thompson, 2024). A similar situation has been observed in Chad, where desertification and the drying up of the Lake Chad basin (Musa et al., 2022) - due to excessive water withdrawal for agricultural use and unregulated grazing that has limited the soil's capacity to retain rainfall - have exacerbated clashes between nomadic herders and settled farmers, who are constantly fighting for a piece of fertile land and a share of water. And again, due to the effects of climate change, Madagascar is increasingly the victim of destructive environmental phenomena, tropical cyclones, increasingly high temperatures, sandstorms, and, conversely, long periods of low rainfall, the cause of the gradual desertification of the island, along with famine, the gradual disappearance of the ecosystem and the unproductiveness of the fields (Rousseau et al., 2023).

We are also dealing with countries characterized, historically, by strong *political instability*; instability that brings with it strong social vulnerability, mistrust in the state, social unrest, internal revolts, and even coups and civil wars. As far as the African continent is concerned, the problems of instability have their roots in the post-colonial era, in which the great European powers drew borders on the territory, bringing together ethnic groups that were also very different from each other, especially from a religious point of view, and forced to live together. This strong fragmentation and lack of national unity have been, over the years, a reason for great political, economic and social vulnerability. A representative case is certainly that of Somalia; when the dictatorship of Siad Barre ended after more than twenty years, a bloody war between clans began in 1991, which is still going on, to which was added the component linked to Islamic terrorism, from which the jihadist group al Shabaab was born, responsible for continuous terrorist attacks in the country (Ciabarri, 2023). Even Chad, after forty years of civil war between the northern regions - supported by Libya, with a Muslim majority - and the southern regions - supported by France, with a Christian majority - is still in a very unstable political situation. After years of dictatorship, there was a *coup d'état* in 1990 that brought General Déby to power; the growing internal political opposition, combined with the new turbulence that has arisen since 2003 from the government's stance towards the reception of refugees fleeing the conflict in Sudan, has led to three coup attempts over the years. At the same time, another major risk for the country is the looming outbreak of Islamic terrorism (ISPI, 2021). There is also persistent instability in the Democratic Republic of Congo; since 1994, the country has been plagued by civil wars and conflicts with its neighbouring countries, Burundi, Rwanda and Uganda, over disputes over territory that is very rich in soil and subsoil resources, aggravated by the succession of dictatorships and high levels of corruption in government (De Felice and Grillotti Di Giacomo, 2024). The Central African Republic, in turn, has for years been the scene of wars and continuous conflicts; after gaining independence from France (1960) it has seen a succession of coups and dictatorships for over thirty years. In 2003, a civil war broke out following the *coup d'état* of self-proclaimed President François Bozizé, which led to a coup in 2013 and the rise of various armed groups vying to rule the country (De Felice and Grillotti Di Giacomo, 2024). South Sudan still carries the legacy of a bloody separation in 2011, following decades of civil war, from neighbouring Sudan. Subsequently, in 2013, a new violent civil war broke out in the country, between the country's two largest ethnic groups, the Dinka and Nuer, which was accompanied by further guerrilla warfare between secondary ethnic groups, for control of portions of territory in the fledgling country (Montanini, 2013). After the end of the civil war in 2015, Burundi saw the dictatorial figure of Nkurunziza rise to power, who remained in government for three terms, brutally suppressing the popular uprisings of Hutus and Tutsis, united in protest, with armed forces. Then followed years of great instability, with a conspiratorial coup d'état against the new president, and frequent armed rebel groups attacking in various parts of the territory (Istituto Geografico De Agostini, 2024, pp.408-409). Lastly, among the countries under attack on the African continent, Mozambique is still at the mercy of Islamic terrorist groups, attracted by the country's energy resources (Mabiso et al., 2014). Among the case studies analysed, the only non-African country is Yemen; one of the poorest countries in the Middle East, Yemen had already been the scene of clashes since 2011, a period dating back to the so-called Arab Spring, when

Abdrabbuh Mansour Hadi came to power in place of Ali Abdullah Saleh. By 2014, tensions became so high that a civil war broke out, between the Shia Muslim rebel movement of the Houthi against the Hadi government; 2015 then saw a further escalation of the conflict, when Saudi Arabia and eight other Sunni states went to war against the Houthi (Tandon and Vishwanath, 2020).

Consequently - on the one hand as a historical legacy, and on the other in response to the correlation of the different types of crises - the *socio-economic* situation of these countries appears to be compromised to date, with significant levels of poverty, which can be associated with factors endogenous to the territory, such as the availability and productivity of arable land, or exogenous factors, such as the effects of climate change, geopolitical tensions and national and international conflicts, the interruption of supply channels resulting directly from wars, or indirectly from the increase in the prices of imported foodstuffs. The African economy is almost entirely based on agriculture, but it is a sector that must contend with conditions of great backwardness, lack of infrastructure and trade channels - leading to not only geographic but also economic isolation - as well as, often, with the quality of the soil and the poor accessibility of water resources. This is, for example, the situation in Somalia, where the agricultural sector, which has always been fundamental to the local economy, has been severely penalised by these polycrisis phenomena, leading the country to import more than half of its food (Hussein et al., 2021), but not with little difficulty since war often interferes with the country's already precarious distribution networks and infrastructure, in some cases completely interrupting supply channels (Hastings et al., 2020). A combination of factors, together with climatic ones, that contribute, in a vicious circle, to worsening socio-economic and environmental conditions, making the population's ability to adapt increasingly difficult, and increasing food insecurity (Thalheimer et al., 2023). Currently, more than half of Somalia's population (51.3%) does not receive sufficient daily calorie intake, constituting the second highest figure among countries in the world, after North Korea, as well as being the third country in the world for high levels of infant mortality and the country with the highest GHI (44.1) derived from hard data[7] . Yemen is also experiencing the close correlation of the crises analysed especially at the level of agricultural production and consequent economic isolation, caused by the extreme effects of climate change and war, which will very soon increase its already significant dependence on food imports (Dureab et al., 2019). Political instability also plays a significant role; in 2018, the closure of maritime and land links caused a drastic cut in the tons of resources entering the country, such as food or fuel, resulting in higher prices, as well as significant damage to imports (which constitute almost all sources of food for Yemen), contributing to the risk of famine (Rahmat et al., 2022). To date, it is the second country in the world, after Burundi, for high levels of child stunting (48.5%), the third for levels of child wasting and still among the top five countries for malnutrition (almost 40% of the population is undernourished) (Wiemers et al., 2024). Chad, Madagascar and the Central African Republic are countries that are experiencing severe difficulties in recovery. The succession of shocks and polycrisis has not allowed the already severely compromised Chad to recover, entering a constant state of emergency;

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[7] According to the GHI 2024 Report, Burundi and South Sudan do not have enough data available to determine an accurate value; their value, therefore, fluctuates in the 'alarming' category between 35 and 49.9, so they could be lower than Somalia, but also much higher.

the country is, in fact, ranked 190th out of 191 in the world on the Human Development Index (Kang et al., 2023) and in 2024 it is the fourth country in the world for high levels of infant mortality. Furthermore, Madagascar is the fourth country in the world for malnutrition (almost 40% of the population is undernourished), as well as being among the top countries for high levels of child stunting. Despite the introduction of the Integrated Food Security Classification (IPC) programme in 2016, to date almost 14,000 people in the country are at level 5, known as *catastrophic*, of food insecurity. This is the first time that Madagascar has recorded such a dramatic level, due to drought, disease, sandstorms, years of deforestation and subsequent soil erosion. Polycrisis has led to the Central African Republic having very high levels of child mortality and almost half of the children suffering from chronic undernourishment (Wiemers et al., 2023). In 2021, more than 70% of the population was below the international average for poverty and among the lowest levels of education, ranking 188th out of 191 on the Human Development Index (Stambach et al., 2024). Potentially, however, the Democratic Republic of Congo would have very good agricultural conditions; unfortunately, despite several national programmes to increase production since the 1990s, there is still a large gap between possibilities and actual response. Difficulties clearly aggravated by the economic, political and health crises (Manyong et al., 2024). Conditions that further worsened undernutrition levels to 37% in 2024 (Wiemers et al., 2024). Mozambique's economy is predominantly based on agriculture (99% of farms in the territory are family-owned); clearly, given the climate emergency that has been ongoing for years, households that depend on agriculture, thus the majority, are the most at risk (Abbas et al., 2024). An interesting study conducted in 2020 uncovered some common factors associated with acute malnutrition in the country, such as coughs, fever, diarrhoea, having experienced shock or unusual events, and lack of access to basic sanitation (Zaba et al., 2020), testifying to the dramatic living conditions of these populations. As mentioned, extreme precarious conditions exist in South Sudan, where widespread poverty, lack of services and infrastructure, severe food insecurity, malnutrition, high levels of infant mortality, poor sanitation, epidemic diseases and frequent contamination of drinking water coexist (Sassi, 2021). According to the Integrated Food Security Classification, in 2023, almost half of the population (46%) was in a situation of acute food insecurity, unable to meet even basic food needs; in addition, considering that almost the entire country is in a state of crisis, there is no area with low levels of food insecurity, while, on the contrary, there are many with emergency levels (Tong and Moro, 2024). Burundi is also a country heavily dependent on agriculture, although, due to the scarcity of arable land, it has a low productivity and incisiveness of the economic sector. As a result, it has one of the highest levels of poverty in the world, more than 70%, as well as the highest rate of child stunting in the world (almost 60%), an indication of very high food insecurity, starting with maternal food security (Wiemers et al., 2023). According to the Global Food Security Report, in 2018, Burundi was ranked 9th in the world for food insecurity, with 50% of the population in a situation of chronic food insecurity (Odjidja et al., 2019). Finally for Lesotho, complicit in the government's inability to provide effective interventions and action plans, malnutrition also depends on poor access to different food groups. Agricultural productivity, which is predominantly subsistence, is severely compromised by climate disasters, forcing the importation of food, resulting in higher prices. This condition is increasingly driving the population towards a carbohydrate-laden diet, which is

paradoxically veering the issue towards overnutrition (Nkoko et al., 2024). Due to the severe weakness of its economic sectors, Lesotho is heavily dependent on neighbouring South Africa.

THE (NOT EVOLVING) POLICY SCENARIO

In 1948, the United Nations recognized the right to food as a fundamental human right. Since then, guidelines have been introduced to help countries around the world make this inalienable right a reality, to which other guidelines and declarations have been added, again with the aim of making governments more and more accountable.

In an attempt to help peoples and governments manage and optimise land resources, while also trying to improve the disastrous levels of food insecurity and access to basic services, numerous interventions have been introduced by bodies such as the FAO and the United Nations, of which the most recent and significant examples for the countries analysed are given below.

Recently in Somalia, the FAO, together with other partners, launched a five-year action programme ("Jowhar Offstream Storage Programme", 2024) aimed at improving water resource management, ensuring constant access to water, and increasing the climate resilience of the region, by strengthening the agricultural sector, laying the foundations for greater economic and political stability in the country, and of course addressing weak food security. This forward-looking project is in addition to its predecessor - Climate Resilient Agriculture "Ugbaad" (2024) - presented at the 40th meeting of the Green Climate Fund (GCF), which aims to improve the resilience of agri-food systems through large-scale investments. In Yemen, on the occasion of World Food Day 2024, organized in the country by the FAO, the need was highlighted to guarantee the right and access to food for the entire population, to intervene on water management and with the introduction of sustainable practices in agriculture, as well as to value women entrepreneurs as a valuable contribution to the creation of resilient local economies (in full coherence with the theme that forms the backdrop of the GHI 2024 Report). In Chad, from 2017 to 2021, with the promise of the introduction of a new cycle, the FAO introduced the "Country Programme" to strengthen food security, through the development of supply chains in agriculture, livestock, fisheries, forestry, and the formulation of policies and strategies for both the achievement of food security and the implementation of sustainable resource management systems. In addition, since 2023, the "Green Graduation Programme" has also been introduced in the country by Concern Worldwide[8] , which offers the opportunity to train the population on the application of important sustainable agricultural techniques and adaptation strategies. In Madagascar, between 2022 and 2024, the FAO and Slow Food International have introduced an action programme to safeguard biodiversity and agrobiodiversity, supporting small-scale farmers, fishermen and forest dwellers through the creation of sustainable and more inclusive agri-food systems. In addition, the two organizations have been working together since 2013 to support rural communities and diversity. In the Democratic Republic of Congo, FAO works on the ground to improve access to food, providing livestock for subsistence, seeds,

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[8] This programme has also been introduced in other African countries, Bangladesh, Burundi, Democratic Republic of Congo, Ethiopia, Rwanda and Somalia.

supporting both food processes and proper food storage, as well as intervening to combat crop and livestock diseases in an effort to improve levels of malnutrition in early childhood. Among the various events designed for the Central African Republic, the World Food Forum (FMA) 2023, has provided a strategic plan of investment and funding for those initiatives that promote sustainable and resilient agri-food systems. In Mozambique, the initiative started with the government itself, which, following the 1996 World Food Summit, in an attempt to curb the country's dramatic conditions, implemented a series of programmes and action plans to reduce poverty levels, chronic malnutrition and food insecurity (Cinquenta et al., 2023). Furthermore, in July this year (2024), the Italian Agency for Development Cooperation (AICS) and the FAO signed a project for the sustainable management of the Miombo forests, a vital source of livelihood for so many families living in rural areas, by intervening on biodiversity conservation, implementing resource management practices, improving market access and the prospects of small farmers. In South Sudan, collaboration between the UN and FAO has already led to the averting of famine in recent years, but we are still a long way from a viable solution. For its part, the FAO is working to bring in specific expertise in food production, as well as having a pivotal role in coordinating humanitarian interventions in agriculture and livestock. To cope with the dramatic conditions in Burundi, the FAO is intervening on several fronts, with the reconstruction of agricultural infrastructure to ensure accessibility to food, introducing, in 2021, some programmes such as "Hand in Hand", "One Country, One Priority Commodity", which aim to improve levels of food insecurity in the medium to long term, as well as specific projects to help communities living in catchment areas to optimise their production. Finally, in Lesotho, as a support to the government's vulnerability, the FAO has introduced a new "Country Programming Framework (CPF)" (2024), with the objective of transforming the country's agri-food systems, improving agricultural production and productivity, to contribute to food security, which is also being challenged by the impact of Covid-19 and avian influenza. In addition to the CPF, other technical cooperation projects, also promoted by FAO, are planned to include the use of technologies to improve agricultural practices and rural development in the country, introduce sustainable urban planning, and finally, a third project on the development of the aquaculture supply chain.

Despite the progress made between the years 2000 and 2016, there has been a drastic slowdown in the fight against hunger in recent years, due to the period of polycrisis that characterises the contemporary world.

All this implies the need for greater investment at international level to reduce the problem of malnutrition in vast areas of the planet, but the question arises as to which political entity will take on this responsibility, i.e. which will draw up new policies of food solidarity with concrete actions.

Chichaibelu et al. (2021, p. 14) are emblematic on this issue: "Yet, given the finding that investments to end hunger are rather modest, the troublesome question arises, what political economy forces prevent the required actions? Obviously, the spending priorities of those who could mobilise the resources seem not sufficiently oriented towards overcoming hunger, and the voice and influence of the undernourished seem too weak to enforce the investment action".

To date, therefore, despite the efforts of the FAO, some governments and various international organizations with humanitarian aims, the gap between policies and their actual implementation is becoming increasingly significant, making the Zero Hunger goal of the 2030 Agenda a long way off.

A SOCIO-ECONOMIC OVERVIEW OF THE CASE STUDY COUNTRIES

Inequality in access to food and the resulting suffering of chronic hunger in some countries of the world often have ancient roots but have often been amplified in recent years by catastrophic natural and anthropogenic events.

The causes are multiple and often stratified, overlapping in their harmful effects, thus generating negative spirals from which it is difficult to free oneself to undertake virtuous development paths, also due to the substantial incapacity of weak and unprepared governance strategies.

By developing some indicators relating to the socio-demographic and economic dimensions, chosen from the World Bank database, for the countries identified as the most vulnerable, it is possible to outline a picture, although certainly not complete, of the current situation of these countries and of the recent evolution that has occurred so far in the 21st century.

The chosen indicators were observed, for the countries designated as case studies, in their evolutionary dimension for the most part in the period 2000-2023 but, where the data were only partially available, we adapted to include the most recent data, trying to have the widest time interval available. In some cases, unfortunately, the data is not available at all and, therefore, it was not possible to obtain significant values. The indicators obtained were compared with global trends, to see if the performances were higher, generally in line with them, or lower. The idea behind this analysis is to try to understand the current and future development trajectories through a synthetic quantitative reading.

Socio-demographic dimension

The socio-demographic dimension is represented through the selection of six indicators: population trend, unemployment in the total workforce, percentage of employment in agriculture, gross percentage of secondary school enrolments, health expenditure in relation to GDP, and infant mortality under 5 years of age. To summarise the work carried out, a panel is presented (figure 4), which schematically highlights the current situation. As regards the population, the global trend indicates an increase from 6.1 to over 8 billion people (almost 32%) from 2000 to 2024, but even higher values have been recorded in the countries taken into consideration.

Most of the countries considered have a rather small population, under 50 million residents, with the notable exception of the Democratic Republic of the Congo with almost 106 million residents. From this perspective, the significant population increases must however be placed in the perspective of modest general increases at an overall level, but still significant in areas where daily sustenance is already in dramatic conditions.

Trend	Population	Unemployment	Employment in agriculture (% of total)	Secondary school enrollment	Health expenditure (% of GDP)	Under-5 mortality rate
Higher trend	Burundi, Central African Republic, Chad, Congo D.R., Madagascar, Mozambique, Somalia, South Sudan, Yemen	Mozambique, Somalia	Burundi, Central African Republic, Chad, Congo D.R., Madagascar, Mozambique, South Sudan	Burundi, Chad, Congo D.R., Lesotho, Madagascar, Mozambique	Burundi, Central African Republic, Congo D.R., Lesotho, Mozambique	Central African Republic, Chad, Lesotho, Madagascar, Somalia, South Sudan
In line with the global trend		Yemen	Lesotho, Somalia	Central African Republic, Yemen		Congo D.R., Yemen
Lower trend	Lesotho	Chad, Congo D.R., Lesotho, Madagascar	Yemen	Somalia	Chad, Madagascar, Yemen	Burundi, Mozambique
Data not available		Burundi, Central African Republic, South Sudan			Somalia, South Sudan	

Figure 5. Panel of socio-demographic trends of case study countries
(Source: own elaboration on World Bank data)

To cite some of the situations in which there have been sudden and marked increases in population, Chad from 2000 to 2024 has seen an increase from 8.3 to 18.8 million residents, with a forecast of 36.5 million by 2050. The Democratic Republic of the Congo has gone from 48.6 to 105.6 million residents, with a forecast of 217.5 million residents by 2050. Even smaller countries such as Burundi and Somalia show notable growth dynamics, doubling their overall population in the period considered.

Such a sudden increase in the resident population at first glance may seem a positive sign of evolution of societies, but if it does not correspond to a simultaneous development of the economy, it is very likely that a worsening of living conditions will occur, due to a need to cope with an increased demographic weight that has not corresponded to a marked economic boost, thus prompting a stress on the carrying capacity of the country system.

The unemployment rate compared to the total workforce is a valuable indicator, but still fragmented and not always available in different countries. At a global level, the index was equal to 5.515 in 2000 and in 2021, the last year presented, increasing to 6.19%. In the countries taken into consideration, the data were partly unavailable or in any case dated back to many years ago, but, in any case, some considerations can be highlighted.

Many of the most recent data for these countries indicate very low unemployment values compared to the world average, which are quite surprising, such as Chad (1.1% in 2018) and the Democratic Republic of the Congo (1.5% in 2020). In other cases, unemployment is very high, such as in Somalia (18.8% in 2019) or Yemen, where the data has not been updated for a long time (13.5% in 2014).

The high level of employment actually hides a situation which is very often composed of unskilled labour in rural areas, sometimes channelled to the mines and commercial agriculture, and, later, secondary industry. The State often allows for lower-wage, labour-intensive firms to operate in poorer, rural areas where workers are less skilled and face limited income-earning opportunities.

Looking more specifically at the data regarding those employed in agriculture, we note that globally the percentage of total workers goes from 39.80% in 2000 to 26.36% in 2022. However, this global contraction is reflected differently in countries, especially the less developed ones. In them, agriculture often remains the refuge sector, low paying, but also almost the only point of reference, given that there are no real employment alternatives.

While it is true that the dynamics of agricultural employees are all contracting, attracted by alternative employment, such as mining, some labour-intensive manufacturing industries and mostly basic services, almost all have reductions in the number of workers below the world average over the period 2000-2022. To give some examples, in Burundi the workers employed in agriculture in this period went from 91.86% to 85.06%, and values around 70% are recorded in Mozambique, Central African Republic, Madagascar and Chad. The lowest value of the countries taken into consideration is in Somalia with 25.92%, due however to the difficulties of cultivation in the country and the existing social and ethnic tensions.

The improvement of living and working conditions, which could indirectly allow better access to food and alleviate the issue of widespread hunger, should have as a fundamental turning point an improvement in overall education. In this regard, the gross enrollment rate in secondary school was taken into

consideration, which at a global level sees a significant improvement from 58.54% in 2000 to 77.10% in 2023.

The data for the countries under study are much more fragmented, but all show some improvement, except for Somalia, whose 2023 indicator is equal to 3.29%, even lower than the 6.08% value of 2007 (there are no other data in the early 2000s). Among the highest values are Lesotho with 59.82% (data from 2017) and the Democratic Republic of Congo with 56.83%.

The strengthening of secondary and tertiary education must therefore be an objective to be pursued more incisively by the governments of these countries, as first steps to emerge from underdevelopment. Currently, the situation in this sense still shows values too distant from those of the world average and international projects to improve their schooling systems.

Another fundamental objective to be pursued by developing countries is the improvement of their healthcare system. The indicator of healthcare expenditure in relation to GDP reflects the commitment of governments to the healthcare needs of their inhabitants. In this sense, at a global level the level has risen from 8.62% in 2000 to 10.45% in 2021.

In countries with a high GHI there are several cases in which healthcare expenditure is quite high compared to the modest GDP, highlighting significant percentages in 2021 as in the cases of Lesotho (10.21%), Burundi (9.10%), Central African Republic (9.07%), Mozambique (9.05%). Observing the evolution from an exclusively numerical point of view, without being able to enter into a qualitative assessment of the expenditure incurred, it can still be highlighted that in these countries, the healthcare objective seems to be at the centre of the agendas of many governments and a clear improvement seems to be occurring in recent years.

Yet, to counterbalance this good result, the figure for infant mortality under five years of age is still very high. At a global level, the figure for 2000 was 76.40 per thousand children in the age group up to five years, while in 2022 it had dropped to 37.1 per 1,000.

In all the countries taken into consideration there has been a significant decrease, often however with trends lower than the global ones, so that all the current values remain higher. Among the most worrying indicators, we can highlight the data from Somalia (106.1 per thousand), Chad (102.9), South Sudan (98.8) and the Central African Republic (96.8), but in general all countries need to significantly improve their infant mortality rates.

It is therefore necessary to make significant progress in ensuring the health of newborns in these countries, as far as possible. In this issue, correct nutrition in this more fragile age group plays an essential role. Progress is visible despite the difficult conditions in which we operate, but further efforts must be urgently undertaken, also improving medical knowledge and assistance infrastructures in developing countries gripped by the problems of endemic hunger.

Economic dimension

The economic dimension is explored by looking at six dimensions: percentage of population in extreme poverty (with a maximum of $2.15 per day), trend of Gross Domestic Product (GDP), gross savings as a percentage of Gross National Income (GNI), percentage of Gross Domestic Product deriving from agriculture, agricultural materials and food exports (% of merchandise exports), agricultural materials and food imports (% of merchandise imports).

The figure below (figure 5) summarises the trends in the indicators taken into consideration for the countries under study, in a similar way to what was done for the socio-demographic component, to underline some brief considerations on the performance of the selected countries in the period from the early 2000s to the latest available data.

According to the World Bank, poverty measures based on international poverty lines attempt to hold the real value of the poverty line constant across countries. The last change in the statistical methodology was in September 2022, when World Bank adopted $2.15 as the international poverty line using the 2017 PPP.

At a global level, a very positive trend can be noted in this index, which from 2000 to 2022, the last year currently available, decreased by 69%, going from a percentage of the world population below the poverty line equal to 29.3% to 9%.

Many of the countries studied have seen a reduction in the number of their population below the poverty line, but in a smaller proportion than the global trend. Some have even seen an increase in the number of their poor population. The data are very fragmented and, in many cases, not updated. However, to give examples of the trends, it can be observed that the best performances are in Lesotho and Chad, but in the latest available years, the number of poor is still extremely poor. For Chad, the 2022 data indicates that 30.8% of the population is poor, while for Lesotho the 2017 data highlights 32.4% of poor people. These data are unfortunately to be considered the best, given the situation, on the opposite scale, of Madagascar (80.7% of the population below the extreme poverty line in 2012), Democratic Republic of Congo (78.9% in 2020), Mozambique (74.5% in 2019).

The inability of many people to generate incomes adequate for a normal life for many people in these countries does not allow the satisfaction of minimum needs, first of all those of access to food and minimum care. Among the causes of what is defined, sometimes, with excessive resignation, as "endemic poverty", we can still highlight the rigidities and deformations of local markets due to colonial and post-colonial logics. But they have not been overcome for various reasons among which emerge the poor performance of economic policies, illustrated by inadequate distribution of income and expenditure, low savings and investment ratios, absence from market economy, insufficient emphasis on the role of women in national development processes, the limited impact of export sectors, failed regional integration initiatives, and the debt crisis.

Trend	Extreme Poverty (headcount ratio at $2.15 a day)	Gross Domestic Product (GDP)	Gross Savings (% of GNI)	Agriculture (% of GDP)	Agricultural raw materials and food exports (% of merchandise exports)	Agricultural raw materials and food imports (% of merchandise imports)
Higher trend	Burundi, Central African Republic, Chad, Congo D.R., Lesotho, Madagascar, Mozambique, South Sudan, Yemen	Chad, Congo D.R., Mozambique, Somalia	Burundi, Congo D.R., Mozambique	Mozambique, Yemen	Lesotho, Yemen	Lesotho, Madagascar, Mozambique, Yemen
In line with the global trend			Madagascar			
Lower trend		Burundi, Central African Republic, Lesotho, Madagascar, Yemen	Lesotho	Burundi, Central African Republic, Chad, Congo D.R., Lesotho, Madagascar	Burundi, Central African Republic, Madagascar, Mozambique	Burundi, Central African Republic
Data not available	Somalia	South Sudan	Central African Republic, Chad, Somalia, South Sudan, Yemen,	Somalia, South Sudan	Chad, Congo D.R., Somalia, South Sudan	Chad, Congo D.R., Somalia, South Sudan

Figure 6. Panel of economic trends of case study countries
(Source: own elaboration on World Bank data)

The observations on poverty conditions are apparently somewhat contrasted by the trend of Gross Domestic Product, which in any case appears to be increasing in almost all countries. At a global level, GDP has essentially doubled from 2000 to 2023 (with an increase of 91%), mainly due to the marked increase in the value produced by services.

As regards the countries considered, almost all of them show an increase in GDP, but sometimes with dynamics that are more contained than the global ones. Among the best performances it is possible to highlight those of Mozambique, Chad, Democratic Republic of Congo and Somalia.

Even though the overall GDP performance of these countries needs to be strengthened, the main issue concerns the fair distribution of income, where economic growth, net of the significant penalties resulting from high inflation rates, benefits a limited number of people belonging to the upper classes.

The data on gross savings on the GNI is very interesting for understanding this aspect, that is, the ability of people to retain wealth. Unfortunately, in many of the countries observed this indicator is not available and this limits the considerations.

At a global level, the percentage of gross savings on the GNI went from 24.17% to 27.79%. In the countries considered for which data are available in all cases, the saving capacity is lower although in the Democratic Republic of the Congo the data is close to the world average (25.53% in 2021), while on the opposite scale the case of Burundi is noteworthy for the lower data (5.53% in 2018).

The low propensity to save also derives from the configuration of existing economic activities and the trade balance.

In the world, the percentage of Gross Domestic Product deriving from agriculture is very modest, although slightly increasing in percentage terms, going from 3.35% in 2000 to 4.12% in 2023.

In the countries studied, these percentages are much higher, although in several cases they are decreasing. The economies are therefore still deeply rooted in the primary sector, but, despite this, it is often conducted as a typology for subsistence and self-consumption, proving to be scarcely effective in alleviating the problem of hunger overall. The reduction in the incidence of the percentage contribution to the Gross Domestic Product deriving from agriculture, therefore, could also be seen as an important signal of evolution of the economy of these countries. But the road is still long if we consider that it still affects more than 20% in many countries: Yemen (28.7% in 2018), Central African Republic (28.6%), Mozambique (26.7% in 2022), Burundi and Chad (both above 25%) and Madagascar (21%).

Therefore, agriculture on the one hand needs to be made more efficient and modernized with investments that allow the development of local entrepreneurship and effective access to ownership by communities, avoiding the transfer of land to external companies. On the other hand, it must be a vital support sector to reduce hunger in these countries, but, at the same time, it is necessary to promote concrete actions to diversify the economy, which reduce its weight on GDP as is happening in the rest of the world, but with a view to expanding the overall economy, not to contracting agriculture, which is a vital support for the sustenance of local communities.

The last two indicators taken into consideration concern exports and imports of agricultural raw materials and food.

Globally, exports of agricultural products and food have increased from 8.91% to 10.05% of the total value. For several countries taken into consideration, data are not available, but in general there are two types of situations. For some they have a marginal weight (Democratic Republic of Congo and Central African Republic), while for others (Burundi, Lesotho and Yemen) they represent an essential component of the trade balance.

Going into more detail, two examples can be drawn from the World Bank database.

Yemen has exports in 2019 equal to 24 US$ Mil compared to much larger imports equal to 4,716 US$ Mil (on which petroleum and oil imports weigh heavily). Exports, typically from a very poor country, mainly concern the statistical categories of "wheat or meslin flour" and "groats and meal of wheat", similar products directed mainly towards Egypt and Türkiye.

Burundi has a similar situation, but the country generally exports intermediate or finished products, although it still faces a strong trade deficit. In 2022, it had 208 US$ Mil of exports, while imports reached 1,260 US$ Mil. Among the exported products, there are goods related to commercial agriculture, not directed to the local market, such as coffee, black tea and beer. In this last case, therefore, the agricultural system is better, but still with a configuration typically inherited from the colonial period, in which the territories are dedicated to the production of goods not intended for the sustenance of the local community and the reduction of hunger, but for the profit of a few entrepreneurs who earn on foreign markets.

Imports of agricultural raw materials and food show a similar percentage of the total between 2000 and 2023, going from 9.23% to 9.79%.

In the countries studied where data are available, the incidence of imports of agricultural and food products is very high.

For example, Lesotho does not have a very significant agricultural sector structure and needs to import a lot of food products, but the trade balance is partially compensated by the export of precious products such as diamonds or other goods such as men's and women's clothing.

Madagascar is another interesting case: its exports include some peculiar agricultural products, such as vanilla and cloves, but also precious minerals such as nickel, cobalt and titanium. As for imports, there are also many food products such as rice and palm oil.

From these two cases, it can be highlighted that the demand for agricultural and food products from abroad could be compensated by valuable and sought-after goods, but their ability to negotiate higher export prices on international markets should be strengthened in order to expand food supplies and improve the nutritional conditions of their domestic communities.

Trying to summarize what emerged from the analysis of these indicators, it is possible to underline that in some countries there are signs of improvement, for example in schooling and spending on health, but the rapid increase in population, the endemic negative factors and the continuous environmental and anthropic crises reveal a picture in which it can be said that the road to the fight against hunger is still long. In particular, the lack of technological progress in agriculture, but also in other sectors, tends to keep large percentages of the population below the poverty line, so that the possibility of accessing basic needs remains extremely difficult. The need to further feed the international circuits of solidarity, not so much in counterbalancing emergencies, as has mostly been done so far, but aimed primarily at strengthening the socio-economic fabric of the hungriest countries.

CONCLUSIONS

In this article, the basic idea was to highlight the profound gaps in access to food and in ensuring sufficient and quality nutrition for all the world's peoples, with a view to intragenerational and intergenerational sustainability.

Through the Global Hunger Index, a number of countries were selected whose situations are currently profoundly negative, compromising their development.

To summarise, there are endogenous structural conditions and long-term trends that can only be overturned through patient resource planning and qualification of the resident population.

The low fertility of many areas, due to climatic factors or peculiar soil conditions (from desert to forest) prevent sufficient production for an often vastly increasing population.

Furthermore, the failure to strengthen in the educational, health and social systems often does not allow for an effective improvement in the living conditions of local communities.

On the other hand, the lack of evolution in basic services is conditioned by economic systems that are still marked by subsistence agriculture and colonial development models, in which the mining and industrial sectors are mostly geared to foreign trade and dominated by multinationals, without bringing real wealth to the local population.

In addition, the emergence of "land grabbing" (the purchase or long-term lease of vast tracts of land from mostly poor, developing countries by wealthier, food-insecure nations as well as private entities to produce food for export) in the 21st century has raised deep concern over food security and rural agricultural development (Daniel, 2011). This phenomenon has been able to develop thanks to the economic power of global multinationals and the weakness of local governments. This has undermined the traditional view of land as a state-owned common good present in many states, especially in Africa, in an attempt to enter a modernisation perspective that contemplates small private property. Transfer of land rights to rural smallholders and communities would make it possible to develop rural production and livelihoods from below, using and building on existing institutions to adapt to internal and external pressures and opportunities (Havnevik, 2011).

The combination of environmental, socio-demographic and economic conditions has so far generated a downward spiral of underdevelopment that does not allow a complete evolution of these countries.

In recent years, as shown by the trend of the indicators chosen to assess the evolution of the countries with the greatest hunger problems, health and education conditions seem to be improving in many territories, also thanks to international cooperation, but it is still not possible to guarantee adequate nutrition for local communities.

Moreover, in recent years, global and regional economic events have further negatively influenced the evolutionary transition of the countries observed.

At the local level, the impact of climate change has coincided with droughts and, conversely, flooding, generating poor harvests and even more precarious living conditions, to which governments, due to a lack of resources and initiative, are unable to respond in a timely manner.

In addition, many of these countries still have a weak sense of national unity, often generating tensions and civil conflicts on an ethnic basis, to the point of completely disrupting socio-economic systems, tearing apart the fabric of social interrelationships that should underpin the building of a national feeling.

Globally, the COVID-19 pandemic caused a sharp rise in the number of people affected by global hunger and food insecurity, numbers remaining at high levels even after the end of the pandemic emergency. In 2023, about 733 million people faced hunger, and 2.33 billion people experienced moderate to severe food insecurity according to The Sustainable Development Goals Report 2024.

The international outbreaks of war, in particular the Russian-Ukrainian one, have also generated two important effects: the contraction of the international circulation of certain types of agricultural and food products, in particular cereals, and the consequent substantially unstoppable rise in food prices (in conjunction with the COVID-19 pandemic)

The solution should therefore be a greater effort of international cooperation in providing knowledge, know-how and technology to help local populations to free themselves from the problem of daily food supply.

But, despite the efforts of international organisations such as the FAO on structural policy initiatives and the World Food Programme on food emergencies, the results can still be said to be modest in eradicating endemic hunger.

To foster balanced development goals and intragenerational and intergenerational sustainability on the global scale with regard to access to food, global cooperation mechanisms probably need to be rethought.

Food has become a powerful mechanism of geopolitical control, a soft power in which the hungry depend on rich countries that can influence the choices of entire communities according to the will of the hand that feeds them.

Even apparently solidaristic policies of knowledge circulation and dissemination of know-how and technological equipment often conceal unequal exchange logics. Therefore, it is not surprising that even today the role of NGOs is fundamental in these territories, to make up for international cooperation, which otherwise is often not sincerely interested in the good of the peoples, but in conditioning them.

It is therefore necessary to rethink profoundly the system of international cooperation and the role of the United Nations, which is incapable of building a lasting international peace after the end of the era of global bipolarism, called for by former UN Secretary Boutros-Ghali (Boutros-Ghali, 1992).

Today's liquid society was supposed to erase barriers and borders between nations in the light of rampant globalisation and the widespread use of ICTs, but strangely it has brought back to the forefront the concepts of borders, ethnic and religious distinctions.

The issue of food is, therefore, seen from this perspective not as a problem of humanity, i.e. with a solidaristic outlook, but with indifference, paternalism or even as a means of controlling peoples.

International cooperation must build new and robust solidarity networks with public and private actors, bringing humankind and its basic needs to the centre. Perhaps this reasoning could be considered utopian, but the spiral of underdevelopment perpetuated in the global distribution of food can only be countered by a decisive international awareness, bearing in mind that there is only one planet and that the suffering of each person indirectly reflects on all the others.

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