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Economic Empowerment Model

Geoeconomics in the First Decades

Highlights

Integration of Young Graduates

Real and Financial Cycle in CEMAC

Discovering Thoughts, Inventing Future

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Family Capital and Professional Integration of Young Graduates in Cameroon

By Tchinda Fouodji Eric & Abessolo Yves André
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Abstract- This paper aims to analyze the effect of family capital on the professional integration of young graduates in Cameroon. From the contextual evolution of Cameroon and theoretical considerations, hypotheses are formulated. They are tested with structural equation models and log linear models applied to the EESI 1 and 2 surveys carried out in 2005 and 2010. It generally emerges that family capital through education contributes to influencing young people's access to segments of the labor market: this is an indirect influence. In addition, due to their socioeconomic position, parents intervene in the professional integration of their children through a preferential choice oriented towards the modern sectors of the labor market (public and formal private sector): this is a direct influence. The influence of the family in the positioning of young people on the labor market increases with the level of education attained increasingly over the period. Policies that reduce the growing influence of parents in the most competitive sectors are needed.

Keywords: family capital, professional integration, education, socio-professional status.

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Family Capital and Professional Integration of Young Graduates in Cameroon

Tchinda Fouodji Eric [α] & Abessolo Yves André [σ]

Abstract- This paper aims to analyze the effect of family capital on the professional integration of young graduates in Cameroon. From the contextual evolution of Cameroon and theoretical considerations, hypotheses are formulated. They are tested with structural equation models and log linear models applied to the EESI 1 and 2 surveys carried out in 2005 and 2010. It generally emerges that family capital through education contributes to influencing young people's access to segments of the labor market: this is an indirect influence. In addition, due to their socioeconomic position, parents intervene in the professional integration of their children through a preferential choice oriented towards the modern sectors of the labor market (public and formal private sector): this is a direct influence. The influence of the family in the positioning of young people on the labor market increases with the level of education attained increasingly over the period. Policies that reduce the growing influence of parents in the most competitive sectors are needed.

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Introduction

Between 1962 and 2007, the share of individuals with a higher education level in employment increased from 8.5% to 51% (Brutel, 2015). The employment situation of young people around the world is a tricky question: 74 million young people are currently unemployed, an increase of 3.5 million since 2007. In 2014, the youth unemployment rate was already high 12% in developing countries, more than three times the adult unemployment rate. In addition, it is said that in the next five years, 200 million people are expected to enter the labor market in southern countries. In Africa particularly, the youth population is growing while access to decent jobs continues to be problematic.

Cameroon, like most other countries in the world, is no exception to this situation. Indeed, the unemployment rate in the broader sense was 5.7% in 2010. It should be noted that these figures mask the reality of the labor market in Cameroon, which is more dominated by urban unemployment among young people and women, the sector informality and the phenomenon of underemployment. In fact, the unemployment rate among young people (in the age group ranging from 15 to 34 years) in the broader sense in urban areas was 15.5% in 2010. unchanged between 2005 and 2010, and is around 90.5%. 92% of young people (15-34 years old) are in the informal sector. It should also be noted that overall underemployment extends over 70.6% of active workers, i.e. 6.3 million employed workers, with a relative drop of 5.2 points compared to 2005. Moreover, young people remain the age group most affected by the phenomenon. In 2010, this rate was 75.8% for the 15-24 age group and 70.6% for those aged 15-34. The evolution of the structure of employment in Cameroon illustrates the need for a balance between the training of individuals on the one hand, and the creation of qualified jobs on the other hand in order to absorb this more graduated.

It seems that the diploma obtained is no longer the key to obtaining neither a stable job, nor even less the keychain of empowerment. As a result, the fast student job seeker should, in addition to his academic achievements, have other extra-academic skills to optimize his chances of professional integration. These additional resources will increase their competitiveness on the labor market, their feeling of employability and therefore their possibilities of professional integration. This last expression is the fact for an unemployed individual to access a job. Professional integration has been used as a dependent variable in several theoretical models (Forrier et al. 2018). These models for the most part have studied this concept at the macro level in order to promote employability in a nation and at the organizational level (See B., 2008).

However, several authors have taken the initiative to understand at the individual level the factors that determine the level of professional integration of young people. To this end, they arrange these factors into three: contextual factors (Nauta, et al, 2009), personal characteristics (Pool, et al, 2014), or both (Clarke, 2017). According to Okay – Somerville and Scholarios (2017), these resources can extend and cover the dimensions: educational, social, cultural and psychosocial. Referring to these multidimensional resources that influence the professional integration of young people, Solon (2017) invokes intergenerational mobility by situating it in the register of family capital. Its quality is an asset for young graduates looking for a job.

Intergenerational mobility refers to the association of socioeconomic status between two generations (Solon, 2017). Also called intergenerational transmission, it represents the impact of the position of

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the parents on that of their children, so that the more this the higher the impact, the lower the mobility (Hellier, 2016). Family capital is now more mobilized by certain categories of assets in order to increase their probability of integration. In a situation of information asymmetry, functions such as executive positions are granted less by promotion (Baraton, 2006). The fact that individuals mobilize social relations to increase their chances of integration thus induces an unequal and discriminatory aspect resulting from these relations. Thus, using relationships to gain access to employment is not competitive. This approach cannot constitute an egalitarian means of matching. We admit that the mode of access to employment, non-competitive like family capital, is without cost for the company and the unemployed person and can lead to a Nash equilibrium for the two agents (Kamanzi et Al., 2010). This balance is not socially optimal. Thus, personal relationships become a more profitable attraction than any other form of recruitment (Mathieu. 1990). Indeed, the selection for hiring by the immaterial resource would mainly retain only those who have a sufficient endowment of social relations, which is opposed to the filter theory which exclusively favors human capital as a recruitment signal. Family capital is likely to favor the retention of the least productive for a nation's economy when its use is aimed at minimizing recruitment costs. Bayer et al. (2005) have justified the merits of taking into account network relations which act increasingly on the effect of economic policies. Thus, how to apprehend the adequacy of the theory of the filter and that of the signal to the problem of the employment of graduates when one must integrate the societal aspect into the theory of job search? Referring to the theory of choices, what is the use of job seekers to choose individual immaterial capital rather than formal intermediaries to be employed?

The INS emphasizes that the family solidarity network (element of individual immaterial capital) constitutes the main means of job search in Cameroon (42.9% of active people obtain employment through this channel) and yet 94% of the unemployed are not registered with a placement or job search agency such as the National Employment Fund (FNE), and even more 57% are even unaware of the existence of such structures. As a result, solidarity or family capital or even intergenerational mobility (which refers to the association of socioeconomic status between two generations (Solon, 2017)) continues to grow. Faced with the use of individual immaterial capital instead of formal intermediaries to be occupied, and faced with the paradoxical observation that despite the decline in social inequalities, the social heritage continues to grow, particular attention remains focused on the question of the true role played by education in the association of status between parents and children in the labor market. Two main currents oppose each other on this question, in particular the liberal or functionalist theory and the conflicting theory.

For the first, education offers the possibility of acquiring technical and social skills that individuals will exchange on the labor market in return for unequal but nonetheless fair rewards (Jeffrey, 1981). Moreover, the dynamics of this educational influence leads to the reduction of inequalities over time. This dynamic vision of liberal theory can be summarized as follows: The association between the socioeconomic status of the parents noted (O) and the level of education of the children noted (E) weakens over time thanks to the expansion of the educational offer. On the other hand, the association between the level of education of an individual (E) and his destination on the labor market (D) increases over time because of the requirement of the skills acquired in the education system. They are the primary criterion for selection in the labor market. As a result, the association between the socioeconomic status of parents and that of their children (OD) weakens consistently over time. In sum, acquiring socioeconomic status is becoming increasingly "meritocratic," at least to the extent that educational attainment is seen as the leading indicator of merit (Jackson et al, 2005).

Contrary to the functional view, supporters of the conflict theory consider that inequalities are perpetuated or even increased, and are the result of a fundamental systemic fault in which the education system and the labor market are instruments used as pretext of equal opportunity. In this sense, the school teaches the "myth" of equal opportunity. For this conflicting view, the association triangle of liberal theory (O-E-D) is nonfunctional neither in its causal relationships nor in the evolution over time of these relationships. This debate is at the heart of the analysis of the triple relationship Socioeconomic status of the parent (O), Education (E) and socioeconomic status of the child (D). It thus makes it possible to explore the mechanisms of transmission of socioeconomic status.

Cameroon has experienced an expansion of access to education in all sections of its population as in most countries in the world. It is true that the stock of human capital that comes from education is of major importance in integration into the labor market (Becker, 1964). However, in addition to the formal human capital acquired at school, the family capital of young graduates can also significantly affect the status acquired by their children in the labor market, both directly and indirectly through human capital. acquired (Becker and Tomes, 1979, 1986). The complexity of the interventions resulting from this reality motivates us to analyze the effect of family capital on the professional integration of young graduates in Cameroon.

This problem leads us to ask the following questions: what is the effect of family capital on the professional integration of young graduates in

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Cameroon? More specifically: what is the direct and indirect effect of this capital on the professional integration of young graduates in Cameroon?

After this introduction, the rest of this paper is structured in two main parts, namely, the presentation of the context of the labor market in Cameroon, the review of the literature and the hypotheses of the work. The second major part will be based on the presentation of the results and the discussion.

I. Context of the Labor Market in Cameroon, Review of the Literature and Labor Hypothesis

a) Context

It should be emphasized that the Cameroonian economy has experienced three major periods, which it is important to mention in order to understand the structure of its labor market.

The first period, which goes from 1965 and 1984, marks a period of prosperity favored by the exploitation of raw materials in an international context marked by the rise in the price of raw materials. At the end of the 1970s, the exploitation of Cameroonian oil was initiated, this period of the economy was marked by a growth rate of 9% per year until 1985 (Njike et al 2005). In this glorious phase of the economy, a vast development program was undertaken with the creation of public and semi-public companies, and the implementation of major projects to generate many jobs in the public sector.

Subsequently, the next phase between 1985 and 1993, the fall in the prices of the main export materials which constituted the base of the economy confronted Cameroon with a crisis which contributed to reducing both production and investments. public. By lowering its investments, the State, which was once the main employer in the economy, found itself forced to lead part of the active population into a situation of unemployment.

The Autonomous Adjustment Program adopted in 1987 did not make it possible to avoid the intervention of the IMF, which stabilized the situation under the label of Structural Adjustment Programs (SAP). The reduction in wages which continued until 1993; the privatization of national enterprises; a dismissal between 1989 and 1997 of nearly 60,000 civil servants; and a recruitment freeze in the civil service, are some of the actions undertaken among the reforms of the SAP. All these measures have contributed to reducing employment in the formal sector to the benefit of the informal sector. This last sector thus becomes the exit door towards which most of the leftovers of the PAS have turned.

In January 1994 we witnessed the devaluation of the FCFA. This post-crisis period is marked by a recovery and a gradual rebalancing of accounts. Despite this recovery, the composition of the structure of the labor market of the 1985s has not been rediscovered, because the structural reforms undertaken in charge of boosting the development of employment have not succeeded in satisfying the supply of cumulative excess work from the crisis period. The formal private sector has remained unable to play the role of the State as the main provider of decent jobs on the national territory. The informal sector and its precarious jobs have thus developed as the only real sector at the origin of the abundant labor supply on the labor market. In the reports of the ECAM 1 and 2 surveys carried out in 1996 and 2001 respectively, the informal sector is presented as the provider of 85% of employed workers. The restructuring and broadening of the objectives of the state institutions in charge of employment, far from attenuating the domination of the informal sector, has only made it worse (90.5% of employed workers are there in 2010 according to EESI 2).

b) Literature paper

Educational inequalities have long been considered as an explanatory factor for the inequalities of opportunity observed in the labor market. For several decades, several other works (Yamagushi (1983); Health and Al. (1992); Goux and Maurin (1997a)) have contributed to showing that the inequalities of opportunity in the acquisition of status on the labor market go beyond beyond the inequalities previously recorded at school. Moreover, using data from the training and Professional Qualification (FQP) survey of 1977 and 1993, Goux and Maurin (1997a) show that over two decades in France, inequalities in social destinies between individuals from different backgrounds do not are forged not only at school but are built throughout life. Goux and Maurin (1997a) find that with a given diploma, individuals have a proven tendency to reproduce the socioeconomic situation of their parents. This observation has fueled a large number of reflections focused on the relationship between the original status of individuals, their level of education attained and their destination on the labor market. The resurgence of this triptych analysis commonly called the Origin-Education-Destination (OED) triangle, is justified by its ability to combine the analysis of inequalities in education and the intergenerational transmission of professional status, and even better the interaction and the decomposition of the responsibilities of these two forms of inequality in the acquisition of a status on the labor market.

It is from this perspective that, based on the four Surveys on Training and Professional Qualification (1970, 1977, 1985 and 1993), Goux and Maurin (1997b) seek to determine the links between social origin, educational success and the social destination in France. By applying log-linear models, they discover that: the inequality of educational opportunities due to

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social origin is very real, but the inequalities of social destinations between people of the same level of education are all the same important. Even if their data does not fit the theoretical models of Bourdieu and Passeron and Boudon. They do a great job of coming up with two alternative models that better fit the data they are using. The first model shows the existence of a specific family capital, i.e. a set of resources that can protect children from high social classes against downward social mobility. The second model postulates that there can be a specific return to social immobility in all classes. However, the log-linear models used by Goux and Maurin (1997b) do not allow us to conclude on causal relationships between social origin, educational success and social destination.

To determine the true role of education in the mechanisms of reproduction of inequalities, Goux and Maurin (2001) apply the Method of Generalized Moments to a sample of 1,099 men interviewed by INSEE (in three regions) in France. Their results suggest that the statistical approach in reduced form, however sophisticated it may be, gives an unconventional view of the mechanisms of intergenerational transmission of social and educational status. According to their analysis, in the case of France the naive reduced-form approach strongly overestimates the role of education in social determinism. This is because this type of approach neglects the role played by the expectations of students whose level of education attained depends in part on what they anticipate in return for their efforts in the education system when they are still studying.

Although this aspect of expectations is very little explored in the literature, it nevertheless helps to demonstrate that there is a two-way relationship between inequalities of educational opportunity and inequalities of opportunity in the labor market. Indeed, several works explore and recognize the sole influence of inequalities in educational opportunities on the labor market. However, taking expectations into account shows that anticipated inequalities in the labor market still influence educational inequalities. The fact that this approach is little explored in the literature is very often due to a lack of appropriate data to capture expectations. On the other hand, the analysis of the triple relationship Origin – Education – Destination and its evolution over time has not ceased to cause much ink to flow in recent years.

Thus, Vallet (2004) analyzes the association between the social origin of individuals, their level of education and their social destination. From four surveys related to the French population (1970, 1977, 1985 and 1993), he first establishes that intergenerational social mobility in its structure has increased and following this, he seeks to establish the role of education in this change. Using log-multiplicative log linear modeling, he presents three different ways of involving education. Firstly through the association between social origin and education (OE) for which he proposes a weakening (reduction of educational level inequalities linked to the social origin of individuals). In a second step, he also opts for deconcentration in order to reduce the education-destination association (which represents a reduction in the advantage offered by education on the labor market and therefore in access to class destinations). most desirable). And finally the existence of the triple OED interaction that promotes greater mobility that can occur due to the formation of a greater number of individuals in the levels where the OD association is weakest. Since Vallet's results confirmed his hypotheses, particularly the third, he concludes that education played a central role in increasing social fluidity in France.

Jackson, Goldthorpe and Mills (2005) in the sense of also analyzing the Origin-Education-Destination (OED) triangle, test the conformity of liberal theory by analyzing the role played by education in the process of intergenerational mobility in Great Britain. Brittany. Their results challenge liberal theory: in other words, their findings indicate that the importance of education in fostering intergenerational mobility tends to decrease rather than increase as liberal theory claims. The latter concentrate the explanation of the finding of this phenomenon on the reduced level of social action, namely that (the decisions of employers vis-à-vis the educational results of employees or potential employees) rather than on functional experiences on a grand scale as liberal theory has always done. The results obtained in the literature have been shown to be dependent on the type of measure adopted during the analysis.

Indeed, still in England, inspired by the work of Vallet cited above, Bukodi and Goldthorpe (2015) analyze the association of the OED triangle from three study cohorts. The latter differ from the work of Vallet (2004) by considering in their analysis education measured from two angles: in an absolute way, that is to say as a consumer good, education measured in a relative way is to say as an investment or positional good. They justify this distinction by the fact that in the economics of education, when we consider education as an absolute or consumption good, it implies that its consumption by a person has no direct effect on the value or the utility of its consumption by other people, while education considered as a relative or investment good implies that the value of an individual's level of education depends on the level of achievement of others. Bukodi and Goldthorpe (2015) find that these two forms lead to significantly different results, namely that, when education is measured in relative terms, the association of the OED triangle offers greater stability over time.

Vallet (2017) analyzes the evolution of the OED triangle association of men and women born between 1906 and 1973 in France from the five FQP surveys of

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1970, 1977, 1985, 1993 and 2003. He finds that the association Intergenerational socioeconomic status is weaker in younger cohorts compared to older cohorts, and he finds that this association decreases during working careers. Moreover, by studying the role of education in intergenerational mobility, Vallet (2017) finds that it has played a key role in increasing social fluidity or greater social openness. In addition to the evolution of the OED triangles over time, an important literature has also focused on comparative analyzes of social fluidity between different countries.

In this comparative approach, we find Hyunjoon (2004) who compares the intergenerational mobility of Koreans to that of France, England and Switzerland. He finds that compared to these European countries, Koreans experience greater upward rather than downward labor market mobility. In the same comparative dynamic between Spain, Germany, Norway and Italy, Triventi (2013) questions the influence of parents on the results of the positioning of their children in the labor market. He captures this influence in his work through salary and professional status. Based on a cohort of young graduates from the Reflex survey, the latter initially finds that, excluding Germany, those who have parents who have completed higher education are more likely to have a professional occupation. highly rewarded. Subsequently, by carrying out the Karlson-Holm-Breen decomposition, he finds that the type of qualification obtained is an explanatory factor for the reproduction of social inequality in the labor market, but its mediating role is more important. in Norway, but smaller in Italy.

Pursuing this comparative perspective, among the few works identified in Africa, Pasquier-Doumer (2010), determines to what extent the original socioeconomic status of workers affects their opportunities in the labor market. This study is carried out in seven capitals of West Africa. In addition to comparing the degree of inequality of opportunity on the labor market in these cities, she estimates, using a two-step logit model, to what extent for each of the cities, the father's professional situation acts directly on the professional integration of his child or if its effect is indirect through education. The latter finds that access to the segments of the labor market of the seven capitals is conditioned by the position of their parents on these segments of the labor market.

The econometric approach of Pasquier-Doumer (2010), however, suffers from a comparability bias linked to the breakdown of the direct or indirect influence of the professional situation of the father. Indeed, as Karlson and Holm (2011) point out, comparing the estimated coefficient of a variable of interest with that of the reduced form deprived of the mediating variables of its effect is not as obvious when it comes to nonlinear models. The coefficients of the two models cannot be matched in a logit because of model rescaling induced by a property of nonlinear regression models where the coefficients and the error variance are not identified separately (Mood, 2010). To face this limit of Pasquier-Doumer (2010), we capture in this study the direct and indirect effect through a decomposition by the method of causal paths of Wrigth (1921).

c) The hypotheses

By considering the Cameroonian context mentioned above as well as the model of Goux and Maurin (1997), we build a set of hypotheses. Suppose a generation of N young graduates compete to access the labor market structured in three sectors (public, formal private and informal). In each sector there is a considerable number of positions available and sometimes similar between sectors. This constitutive structure of the sectors of the labor market escapes the control of individuals who have no power of modification through their behavior. This situation generates the intervention on the labor market of a set of processes, including those that are not meritocratic. Thus, the family intervenes, which becomes an institution complementary to the market.

Its intervention depends on the social context and varies according to the situation and specifically to the environment that the offspring must face. All this leads us to the following hypothesis:

Hypothesis: The family capital of young graduates in Cameroon influences their professional integration through the level of education attained by the child and the socioeconomic status of the father.

According to this hypothesis, we assume that the belonging of each graduate to a family is a situation that creates an environment in which the latter is necessarily influenced in a process that goes from his education to his professional insertion, passing through the status that keeps his parents occupied in society. This influence is mediated by several mechanisms. Inegalitarian and non-meritocratic mechanisms operate hierarchically and sequentially between education and the labor market. In other words, family capital intervenes first in training (which generates social inequalities in education) and then, this capital intervenes in the labor market (which generates inequalities of access to the labor market) . The existence of these two types of inequality reflects the existence of a direct effect and an indirect effect of family origin, for example, on the process of positioning an individual in the labor market. The presence of these two forms of inequality still leaves uncertainty about the role that education plays in the fight against unequal access to the labor market, which leads us to suppose what follows.

H1.1: The level of education attained influences the professional integration of young graduates by reducing inequalities of access to the labor market.

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It follows from this hypothesis that belonging to a family has an impact on the level (and even the quality of education received). Thus, as the level of education increases, inequalities of access to labor market segments are reduced. Considering that the inegalitarian and non-meritocratic mechanisms operate in a hierarchical and sequential way between education and the labor market, we can deduce that in the labor market, the family intervenes to further protect its children who are least endowed with educational resources in order to preserve them from downward social mobility.

H1.2: The influence of the socioeconomic status of the father on the professional integration of young people evolves differently according to the institutional sectors.

Given the context of the Cameroonian labor market characterized by the preponderance of informal and precarious activities, and the difficulty of matching the supply of decent job training and the demand for these jobs which give access to privileged sectors,

II. Methodologies and Presentation of Results

We analyze in this part of our work the effect of family capital on the professional integration of young graduates in Cameroon. In other words, it is a question of examining the association that exists between the socioeconomic status of the father and that of his child in relation to the level of education attained by the latter. It is also a question of examining the evolution of this association over time. To achieve this, we first present the data and the methodology to then present the results of the analysis.

a) Data and Methodology

i. *Data and variables*

This study is carried out with secondary data collected throughout the national territory (10 regions of Cameroon). This is precisely the first and second Survey on Employment and the Informal Sector EESI 1 (2005) and EESI 2 (2010) carried out by the National Institute of Statistics (INS). The EESI 1 and 2 surveys pursue one objective, that of monitoring and evaluating government strategies related to employment issues. 8,540 households were selected in 2005 (EESI 1) from two-stage stratified draws, and 8,160 in 2010 (EESI 2). The total number of people aged 10 or over successfully surveyed is thus 22,765. The EESI surveys used here are those of the two-phase 1-2-3 type. "Employment Survey", first titled, aims to understand employment, while the second titled "Informal Sector Survey" aims to assess the economic activities of the non-agricultural informal sector.

To carry out a study on intergenerational transmission in Cameroon, these 1-2-3 type surveys are appropriate. Indeed, in addition to the professional situation and the level of education of the respondents, these surveys provide information on the level of education and employment of the parents of each respondent when the latter was 15 years old (the information of the parents of the respondents when these were 15 years old can be found in the section entitled "Trajectory and Prospects"). The EESI 1 questionnaire only contains information on the father of respondents when EESI 2 contains information on the father and mother of respondents in its "Trajectory and Prospects" section. This provision of information constrains us with regard to this study to focus only on the association between the characteristics of individuals and those of their father. To make these databases appropriate to our study, we proceeded to a data purification process, which led us to a total of 4,440 individuals aged 25 or over in 2005 (EESI 1) and 4,138 individuals from the same group in 2010 (EESI, 2). We generate the following variables of interest on these obtained study samples:

ii. *The socio-professional category of the parent and the child*

Like Pasquier (2010), our analysis of the chances linked to professional integration according to socio-professional categories is based on the work relationships that characterize the different professions considered. We thus distinguish the professions which require the work of others (bosses, employers), those which neither request nor offer work (self-employed workers, family help) and those which offer their work (executives, engineers, supervisors and similar, employees, workers and labourers). To deal with the problems of low numbers encountered in certain socio-professional categories, we segment those who offer their work into two categories. Pasquier (2010) proceeds to a segmentation into three categories. In total we retain four CSPs: The first two are made up of salaried professions while the last two are full of non-salaried professions. So we have:

Managers, engineers, supervisors and the like;

Bosses, employers;

Clerks, Laborers, Labourers;

Self-employed, family help.

In addition to the professional category, the institutional sector is another variable that we consider.

iii. *The institutional sector of father and child*

To code the inequalities of opportunity of access to the sector of the Cameroonian labor market, over the two generations that interest us, we code a variable that takes into account the institutional sectors of the labor market. This variable makes it possible to identify the informal sector and the formal sector (public and formal private). It is chosen to reflect the segmentation of the labor market that characterizes so-called developing countries such as Cameroon.

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Constructing this variable in children is easier, unlike parents, who have retrospective information. To face this difficulty, we consider as Pasquier (2010), that the parents who work in the informal sector are those who worked in a micro-enterprise, an associative enterprise. These various enterprises belong either to a household or to the person concerned. The rest is up to the public and the parapublic. Thus, the coding of the institutional sector is carried out in the two generations by a categorical variable comprising the following three modalities: 0 "informal", 1 "formal private" and 2 "public and parapublic". Verification of the robustness of the results obtained from this variable requires the construction of variables allowing us to compare the effect of a particular sector of the Ascendant with the two others. In both generations, we therefore construct three variables. First we have "public VS private formal and informal", then the second "private formal VS public and informal", and finally the third "informal VS public and private formal". These variables offer the advantage of isolating the causal effects of the sector of the fathers in the access of their offspring to this same sector. They also make it possible to compare which of the sectors is the most dependent on access to the status of the father.

iv. *The level of education*

To take into account the contribution of education in intergenerational mobility, we construct an education variable that takes the following four modalities: 0 "no level", 1 "Primary", 2 "Secondary", 3 "Higher".

b) Methodology

Since the objective is to analyze the effect of family capital on the professional integration of young graduates in Cameroon, we propose in a first time to use the log-linear models developed from the work of Birch (1963, 1964a, 1964b, 1965), Goodman (1970, 1986), Xie (1992), and Erikson and Golthorpe (1992). Several reasons justify the choice of these models in this study. Besides the fact that all analysis variables are qualitative, log-linear models (unlike the traditional approach of regression models) help to examine simultaneous analysis of coupled relations, taking into account the possibility of analyzing three-way and higher-order interactions between variables. To this end, these models allow, in addition to the intergenerational association of socioeconomic status, to test the way in which this association varies according to the modalities of a third variable: the level of education attained.

Consider a contingency table formed by our three variables, O to I modalities, D to J modalities and E to K modalities. Suppose the reference model is the Egalitarian Meritocracy (EM) model. According to Goux and Maurin (1997a), this model is meritocratic. Indeed, it assumes independence between the socioeconomic status of the parent and the level of education attained. It is egalitarian in the sense that the status achieved in the labor market depends solely on the level of education. In other words, this model assumes full equality of opportunity both at school and in the labor market and looks like this: log where OED=(O)(ED) (1) the estimated frequencies of the contingency table, λ= the mean of the logarithms of all the estimated frequencies of the table. The coefficients, respectively represent the specific effects of level 1 which measure the deviation from the mean linked to the variables O, D and E. The coefficient, measures the level 2 association between E and D which represents the hypothesis that professional integration and more precisely, the destination on the labor market depends on the level of education attained.

Following the estimates by the maximum likelihood method, several tests are carried out. They make it possible to determine whether the estimated frequencies are not significantly different from the observed frequencies. An additional interaction will be introduced if the frequencies are statistically different.

This modeling aims to determine by addition (backward), or deletion of the interaction parameters. This parsimonious model satisfactorily reproduces the table of observed frequencies. If the estimated frequencies obtained from model 1 are statistically different from those of the empirical contingency table, an interaction between O and E noted should be introduced. This introduction leads to the Inegalitarian Meritocracy (IM) model. It thus assumes the presence of inequalities in educational opportunities. This representation is written: Log where OED= (OE)(ED) (2). If the observed data are not faithfully reproduced by model (2), we introduce an additional denoted parameter that measures the association between the socioeconomic status of an individual's parent and his or her in the labor market.

Log (3) where OED=(OE)(ED)(OD)

This model, commonly called the model of constant association or absence of interaction with three variables, assumes the presence of inequalities of opportunity in the labor market that are rigorously constant with the level of education. It also assumes an investment by each family in the positioning of its child on the labor market. Indeed, according to this model, all the odds ratios which measure the intergenerational statistical association obtained are constant with the level of education. Estimated with (I-1) (J-1)(K-1) degrees of freedom, this model implies that the inertia linked to the levels of education painted by this model can distort reality even when this model turns out to be close to the data. Indeed, if this model reproduces the data of the empirical contingency table in an acceptable manner, it is still necessary to test the difference between it and the saturated model. Indeed, several

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authors have long been inclined to erroneously conclude in favor of the persistence of the inertia of inequality of opportunity on the basis of the standard log-linear constant association model. However, the latter very often turns out to be incapable of modeling in a parsimonious way the way in which the statistical association between two variables varies according to the modalities of a third variable.

Taking this situation into account, in addition to the previous models which allow us to test situations of inequality of opportunity in the classroom and on the labor market separately, we also use the "log-multiplying layer effect model". Still called the Unidiff model, it was proposed simultaneously by Xie (1992) and Erikson and Golthorpe (1992). It (the Unidiff model) assumes a stable structure of the association between O and D and detects the dominant tendencies of this association. These trends evolve in terms of the variation between the modalities of the education variable (E) through the beta parameter of expression 4 below:

$$\text{Log where OED} = (\text{OE})(\text{ED})(\text{OD}) \quad (4)$$

In expression (4), is a parameter reflecting the form of the intergenerational statistical association. (or according to the presentation model adopted) represents a parameter which translates for a given level of education k the relative strength of this association. If for a given level of education (such as "no level"), the coefficient β is set to 0 (or 1 when applying the exponential), a negative parameter (or less than 1) for another level of education (for example "primary") implies that the intergenerational link on the labor market is weaker among people with "primary" level compared to those with "no level". If on the other hand > 0 (respectively greater than 1) this reflects the fact that the link is more important. In other words, social mobility is lower among less educated people. Under this assumption, the relative odds ratios become Log ().

That is to say that the logarithm of each odds ratio is decomposed as the product of a common structure) and a parameter specific to each level of education.

In fact, the models mentioned above are nested models. They are comparable with each other based on specification tests of log-linear models. The choice of a model is based on the criterion of the quality of adjustment of the model to the observed data and on the criterion of parsimony. It is the ability of the model to reproduce the observed data with fewer parameters. These criteria are a priori contradictory. In other words, the reference model that assumes independence between variables not only contains fewer parameters, but is the least able to translate reality. To this end, the specification tests therefore consist in examining whether the best predictive quality of the models with the most interaction justifies their large number of parameters.

Although log linear models allow us to analyze intergenerational mobility and to determine the place of education in the process of social reproduction, they do not, however, allow us to determine causal relationships. For this, we propose to accompany these models with structural models such as analyzes of causal paths. They also make it possible to test the robustness of the results obtained from the log-linear models.

c) Results and robustness

As said above, we analyze in this part of our work the effect of family capital on the professional integration of young graduates in Cameroon. It is a question of examining the association that exists between the socioeconomic status of the father and that of his child, the latter having reached a certain level of education. It is also a question of examining the evolution of this association over time. Referring to the segmented structure of the Cameroonian labor market, the labor market status of an individual and that of his father are analyzed in terms of institutional sectors (public, private formal and informal). The structure of the labor market as presented in Cameroon is marked by significant income differences between these different sectors. It is therefore a question for us of testing beforehand the hypotheses of the presence or absence of inequalities of opportunity both at school and in the labor market. In table 1 below are grouped the results.

Table 1: Patterns of association (OD) by level of education (E) in 2005 and 2010

Modèles	EESI 1 (2005)					EESI 2 (2010)				
	df	rG^2	p	BIC	DI	df	rG^2	p	BIC	DI
(1) OE ED (Indep Conditionnelle)	14	0,00	0,00	-26,9	4,6	7	0,00	0,00	32,0	3,9
(2) OE ED OD (Association constante)	10	82,5	0,10	-68,1	1,6	7	95,5	0,77	-4,2	0,5
(3) OE ED β_EOD (UNIDIFF en OD)	7	93,9	0,60	-53,3	0,9	5	96,9	0,73	-8,8	0,4

Source: Author from STATA15

Table notes: G^2 represents the likelihood ratio statistic, BIC the Bayes information criterion and DI the dissimilarity index which indicates the percentage of people misclassified by the model.

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The unequal meritocracy or conditional independence model is located on the first row of Table 1. It is considered the reference model. According to this model, the level of education attained is linked to the status of the parents (Inequality). Positioning in the labor market is only linked to the level of education attained (meritocracy). When introduced into the model of inegalitarian meritocracy as presented in the second line of Table 1, the dependence of an individual's institutional sector on that of his father (OD), undergoes an improvement of 82.5 percent of difference between the actual 2005 data and the reference model. This improvement is 95.5 percent when we refer to 2010 data. The intergenerational link of the status is, so to speak, decisive in explaining the reality of the Cameroonian context. In addition, the resulting model satisfactorily reproduces the data with non-significant probabilities of rejecting the hypothesis of difference between the data of this model and the real data.

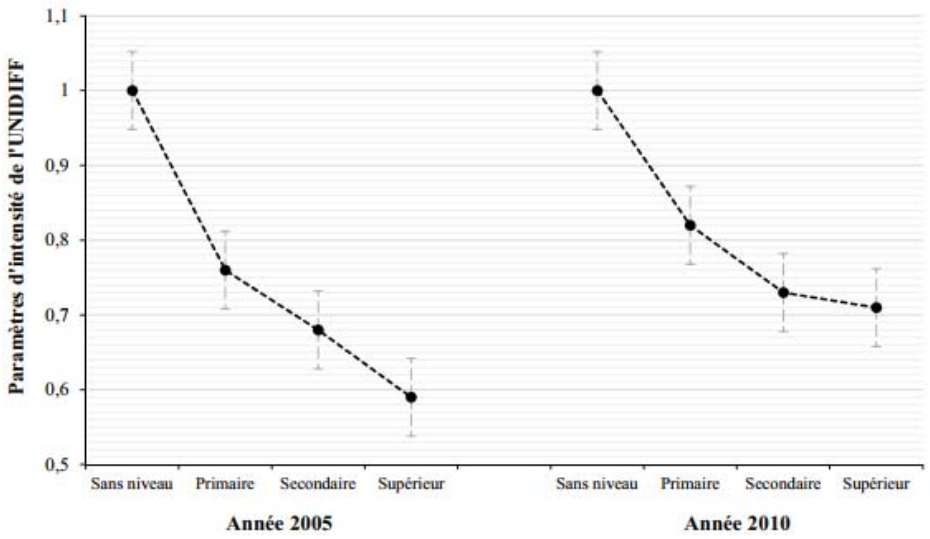
In other words, model (2) indicates that in addition to the presence of inequalities of opportunity at school, the Cameroonian labor market has a non-meritocratic character. This non-meritocratic character is perceptible in the sense that the institutional sector affected is linked to that of the father. As our first hypothesis states, family background is a determining factor of positioning in the labor market. Indeed, the fact that the status of the father is linked both to the level of education attained and to access to the institutional sector of his offspring reveals this reality. It is useful to question the direction of variation of the association between the institutional sector of the father and that of the child according to the level of education attained. This will determine the role of education in this positioning scheme.

It is important to remember that the constant association model assumes an inertia of association (OD) over the levels of education reached. According to this model, the parents' institutional sector influences children's access to institutional sectors in the same way, regardless of the level of education attained by the child. In the process of positioning in the labor market, education according to this model seems passive. To this end, it does not fight against the inequalities of opportunity present on this market. The constant association model has long been used to conclude on the inertia of education. This conclusion made solely on this basis has long been one of the criticisms made of these types of work. Indeed, they do not take into account the very often significant difference between the constant association model and the saturated model. The latest model indeed accurately reflects reality. To avoid this criticism, we question the role of education through another modeling (Unidiff modeling) of the third row of Table 1. This modeling is able to capture the association differences (OD) that can be found between the different levels of education reached.

It can be seen that the Unidiff model better fits the real data observed whatever the year considered compared to the constant association model of the second line. Indeed, with regard to the percentage of people misclassified in 2005 compared to the reference model, we can see a decrease from 1.6 percent to 0.9 percent when we move from the constant association model to the Unidiff model, and from 0.5 percent to 0.4 percent in 2010. In addition, the differences in Bayes Information Criteria (BIC) between these two models are all greater than six in 2005 and in 2010. This thus leads to preferring the model Unidiff to that of constant association. We can thus say that in Cameroon, the level of education attained by the child is a factor which explains the intensity with which the institutional sector of the parents influences the access of their child to the institutional compartments of the labor market. The realities related to the inertia of education in the eviction of inequalities of access to the compartments of the labor market is not significant for the Cameroonian context. Moreover, it is important to question the direction of variation of the intensity of the association (OD) as the level of education increases.

To this end, Figure 1 below shows the variation in the intensity of the OD association according to the modalities of the child's level of education. These modalities are considered by the intensity parameters of Unidiff. In this figure, we see the drop in the point estimates of the Unidiff parameters. This situation reveals that in Cameroon, the intensity of the influence of the institutional sector of the father on the labor market decreases with the level of education of the child. In other words, as the level of education of children increases, the inequalities of opportunity to access segments of the Cameroonian labor market decrease. The investment of parents in the education of their children therefore contributes to reducing inequalities of opportunity in the Cameroonian labor market. The fact of saying previously that the level of education attained depends on the status of the father explains that family origin and level of education are two complementary factors whose pooling determines the socioeconomic status of an individual.

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Source: Author based on EESI 1 and 2 data

Figure 1: OD association by level of education in 2005 and 2010

Family capital acts prior to school. Their involvement in the labor market remains conditioned by the level of education of the young graduate. Thus, the education of the young person is strongly influenced by the family. The latter uses it as an instrument of protection and positioning of its descendants. Education has played an almost unchanged role over time. However, its intensity seems to have varied between 2005 and 2010.

According to the figure above, we observe the fall in the point values of the intensity parameter Unidiff in 2005 compared to 2010 because the slope of 2005 is steeper than that of 2010. Seen from another angle, we will say that between 2005 and 2010 the level of family involvement in children's education is increasing. The immediate consequence is, in addition to the reduction of inequalities of opportunity of access to segments of the Cameroonian labor market, the use of the level of education as an intermediary of intervention of the family for the positioning of their children on the labor market. In 2010, unlike in 2005, the intervention of the family with regard to access to segments of the labor market seems more marked. Jackson Golthorpe and Mills (2005) reach the same result in their work. This leads to a questioning of liberal theory. Indeed, our results indicate that the influence of education in the mediation for the positioning of young people in the labor market tends to decrease. The phenomenon of diploma inflation that follows the expansion of education in Cameroon seems to be a plausible explanation.

i. *Analysis of causal relationships*

Previously used log-linear models allowed us to analyze intergenerational associations. Thanks to these models, we have a global reading of the nature of the associations between the generations involved in association. With regard to causal relationships, these models are subject to many difficulties. In doing so, they do not allow causal relationships to be determined. They struggle to lead to recommendations. The reasons given lead us to use the path analysis model of Wrigth (1921). These models have two additional advantages in addition to the fact that they allow the analysis of the causal influences of the OED triangle: they trace the different paths of causality between the analyzed variables. In addition, it breaks down these effects, specifying the direct and indirect causal effects between two variables that pass through an intermediate variable.

In this regard, Figure 2 presents the over-identified model of causal paths with three latent variables constructed according to a structure of hierarchical causalities contained in the following hypotheses: (a) the socio-economic status of the father or the social origin of the son is a latent variable depending on the level of education of the father; (b) the level of education of the child is a function of the level of education of his father, the socioeconomic status of the father and the individual characteristics of the child, and finally (c) the social destination (or socioeconomic status) achieved by the child, which is a latent variable depending on the social origin, the level of education of the father, and the individual characteristics of the child. By breaking down the correlation matrices of the variables of the model estimated according to the maximum likelihood, four components emerge. The latter make it possible to distinguish what is an effect (direct, indirect, unanalyzed, and misleading) in the causal relationship between two variables.

The quality of fit of the models is excellent, whether the fit indices considered are absolute or relative. According to the absolute indices, we obtain in 2005 and 2010, a chi square has nine degrees of

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freedom respectively equal to 48.07 and 50.34. Both have zero non-significance probabilities. Concerning the square root of the average error, it does not exceed the upper limit of 0.07 as underlined by Steiger (2007), with in particular an RMSEA equal to 0.031 in 2005 and an RMSEA equal to 0.033 in 2010. the category of relative indices, we find respectively in 2005 and 2010 a CFI equal to 0.995 and 0.992.

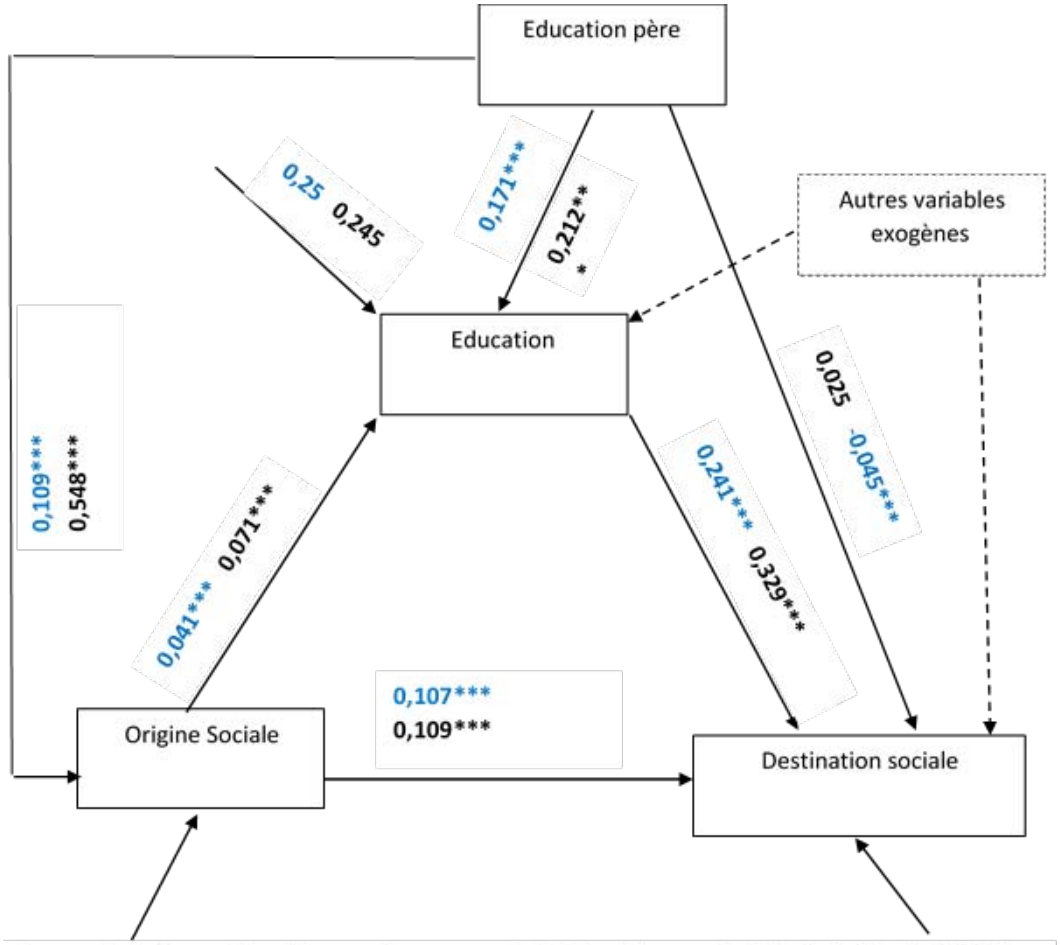
In Figure 2, we can read the coefficients of the paths of causality between the variables of the estimated structural model. In accordance with the first hypothesis mentioned on the relationship between O and D, the status of the father does indeed influence the destination with significant causal path coefficients of the order of 0.107 in 2005 and 0.109 in 2010. This slight increase between 2005 and 2010 is explained by a stronger link between the status of the parent and the level of education, as assumed by the existence of this link in the first hypothesis. This result challenges the dynamics of OED relations of liberal theory as already mentioned. In addition to confirming this by the causal path coefficients, Figure 2 shows that the influence of the family in the education of the child is also present through the level of education of the father. Through this path, it emerges that the father's level of education affects the variance of the son's level of education by 4.5 percent in 2005 and by 3.5 percent in 2010. The meritocratic character of the destination of the son on the labor market evolved in an increasing way between 2005 and 2010. This percentage went from the order of 6 to 11 percent in the explanation of the variance of the destination on the labor market, which is consistent what liberal theory predicts.

So far, the coefficients presented in Figure 2 represent only direct causal effects between the variables. However, the model estimated here makes it possible to determine the total effect of one variable on another by adding to the direct effects of figure 2, the indirect effects resulting from the decomposition of the correlation coefficients. Table 2 below presents the results of the breakdown of the effects according to the different sectors. From this table, the following main conclusions can be drawn: The last row of Table 2 shows that overall, the total effect of the status of the parent on the destination of his offspring increased from 0.117 to 0.132. From the total effect, the indirect effect that passes through the level of education has also increased. It went from 8.56 percent of the total effect in 2005 to 17.43 percent in 2010.

With regard to hypothesis h1.2 according to which the influence of the socioeconomic status of the father on the professional integration of his child evolves differently according to the institutional sectors, we note that: when we distinguish the different institutional sectors of the market of work, it emerges that in general, the increase in the influence of the status of the father on the positioning of his child on the labor market is more a consequence of what happened in the modern sectors contrary to the sector of the informal. Indeed, as the first two rows of Table 2 show, the influence of the status of the father in access to modern sectors has increased over time, this much more so in the public sector where the direct effect of the father has increased. 60.22 percent with a total effect of 65.52 percent; while in the formal private sector, this increase is less, namely around 19.35 percent for the direct effect and 20.21 percent for the total effect.

In addition to the fact that the influence of parents has increased over time in access to modern sectors, we also realize that in certain privileged sectors, the direct effect of the father increases with the level of education. As can be seen in the figure (in appendix 2.III). From this figure, it emerges that: With regard to access to the public sector, the influence of the father has not only increased over time but also increases as the level of education increases. This means that in the public sector, education seems insufficient to access the best positions in the labor market. This is one of the reasons that serves to understand the action strategy of families in accessing the compartments of the labor market. Indeed, in the face of the expansion of education, as the level of education increases, competitiveness in access to the highly demanded public sector becomes increasingly important. This situation is at the origin of the greater influence of family capital. This trend can be seen in 2010 at the formal private level. This shows that the family intervenes more where the competition for access is more and more important, independently of the level of education.

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Lecture de la figure : Les effets en noirs sont ceux de 2005, en bleu ceux de 2010. * significativité à 10%, ** significativité à 5% et *** significativité à 1%. Les flèches en traits interrompus représentent un ensemble de variables exogènes dont les effets ne sont reportés dans la figure 2. Mais reportés en annexes. Les traits en interrompus représentent les variables exogènes du modèle qu'on s'abstient de présenter ici par soucis de simplification. Cependant le modèle intégral se trouve en annexe2.I.

Figure 2: Analysis of the causal paths of intergenerational mobility between 2005 and 2010

Table 2: Breakdown of the effects of social origin on destination

Effets de l'origine sociale		2005			2010		
		Direct	Indirect	Total	Direct	Indirect	Total
Public	Origine sociale	0,088	0,007	0,095	0,141	0,016	0,157
Privé Formel	Origine sociale	0,093	0,001	0,094	0,111	0,002	0,113
Informel	Origine sociale	0,121	0,011	0,132	0,079	0,026	0,104
Ensemble	Origine sociale	0,107	0,010	0,117	0,109	0,023	0,132

Source: Author from STATA 15.

ii. *Robustness and additional analyzes*

From two analyses, we test the robustness of the conclusions resulting from the models estimated in this work: it is for us firstly to examine the existence of a selection bias that can taint the results commented on so far. Then, it is a question of modifying the specifications and the methods of estimation of the models. We thus present that it follows the logic and the conclusions of these additional analyses.

On a total sample of 8,578 individuals divided into 4,440 individuals in 2005 and 4,138 in 2010, we carried out the previous analyses. To test whether the attrition of the base sample caused both by missing data and by data processing led to a selection bias capable of tainting the results commented on above, we proceed from STATA 15 to an estimate using the multiple imputation method of missing data. This operation is carried out under the assumption that the

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variables were missing at random. The results obtained from the samples resulting from multiple imputation do not differ from those previously obtained. Indeed, with regard to the Unidiff model, the status of the father is always linked to that of his offspring and the intensity coefficients of the association also remain decreasing as the level of education increases as shown in the annexes 5 and 6. In addition, for the estimation of the causal path models, the structure of the results remained the same. We just observed a slight increase in the direct effect of social origin on social destination. We can thus say that the results of this study are not subject to the influence of a selection bias of the study sample.

When the "Bootstrap" method is combined with that of the "Maximum likelihood with missing values" as a method for estimating the coefficients of causal paths and the variance-covariance matrices, the results of the models of causal paths remain identical. In this sense, the robustness of the results is confirmed, we also proceeded to an estimation of different specifications of models suitable for analyzing intergenerational mobility.

With regard to the results of the Unidiff model, we aggregate the level of education into three modalities which are: "no level and primary", "secondary", and finally "higher". These actions are taken in order to see if the results are biased by threshold effects related to the way in which the modalities of the "education" variable are considered in the estimates. This way of aggregating education (under these three modalities) helps to obtain a better balance of frequencies between the modalities of the education variable. The results thus obtained confirm the drop in the influence of parents on the labor market as the level of education of the child increases. In addition, the figure presented in Appendix 8 reflects the fact that on the basis of the difference in slopes of the straight lines of the intensity coefficients: the conclusion that the influence of family capital in the positioning of young people on market segments Cameroonian labor is decreasing less and less.

III. Conclusion

The objective of this part was to analyze the effect of family capital on the professional integration of young graduates in Cameroon. To achieve this objective, it was a question of analyzing the triple relationship between the socioeconomic status of the father, the level of education of the child and the destination of the child on the labor market. From of the Cameroonian context, a set of hypotheses have been formulated, from which emerge the following main results: Cameroonian society is not a pure egalitarian meritocracy because, in addition to the presence of inequalities of opportunity at school, there is an inequality chances of access to institutional sectors and socio-professional categories. The family history evaluated as much by the institutional sector of the father as by his category socio-professional role is found to be decisive in the production of educational status and social status.

When we observe how the association between the socioeconomic status of the father and that of his child varies according to the level of education attained, it emerges that, in general, the school contributes to reducing the inequalities of access to the compartments of the labor market. However, specifically, the influence of the father in access to the public sector increases as the level of education increases. This reveals that the influence of the family is less among the most educated children, but when competition between them increases, this influence also increases, as is the case with access to the public sector. Also, although the school reduces the inequalities of opportunity on the Cameroonian labor market, it appears from this study that this role of the school has diminished over time because, the inequalities of opportunity of access to segments of the labor market cameroonians decrease less as the level of education increases between 2005 and 2010. This trend is all the more worrying since, between 2005 and has rather increased in general, and in accordance with the hypotheses mentioned, these inequalities of access have increased in the modern sectors, this much more in the public sector where the competition to access it seems tougher compared to the formal private sector. In view of the loss of efficiency of the school over time, it appears that measures must be put in place to increase its efficiency in the fight against inequalities linked to family origin in access to the market. work. In addition, special attention should be directed to sectors where competition for access is increasing over time, thus contributing to discrediting the meritocratic character of education.

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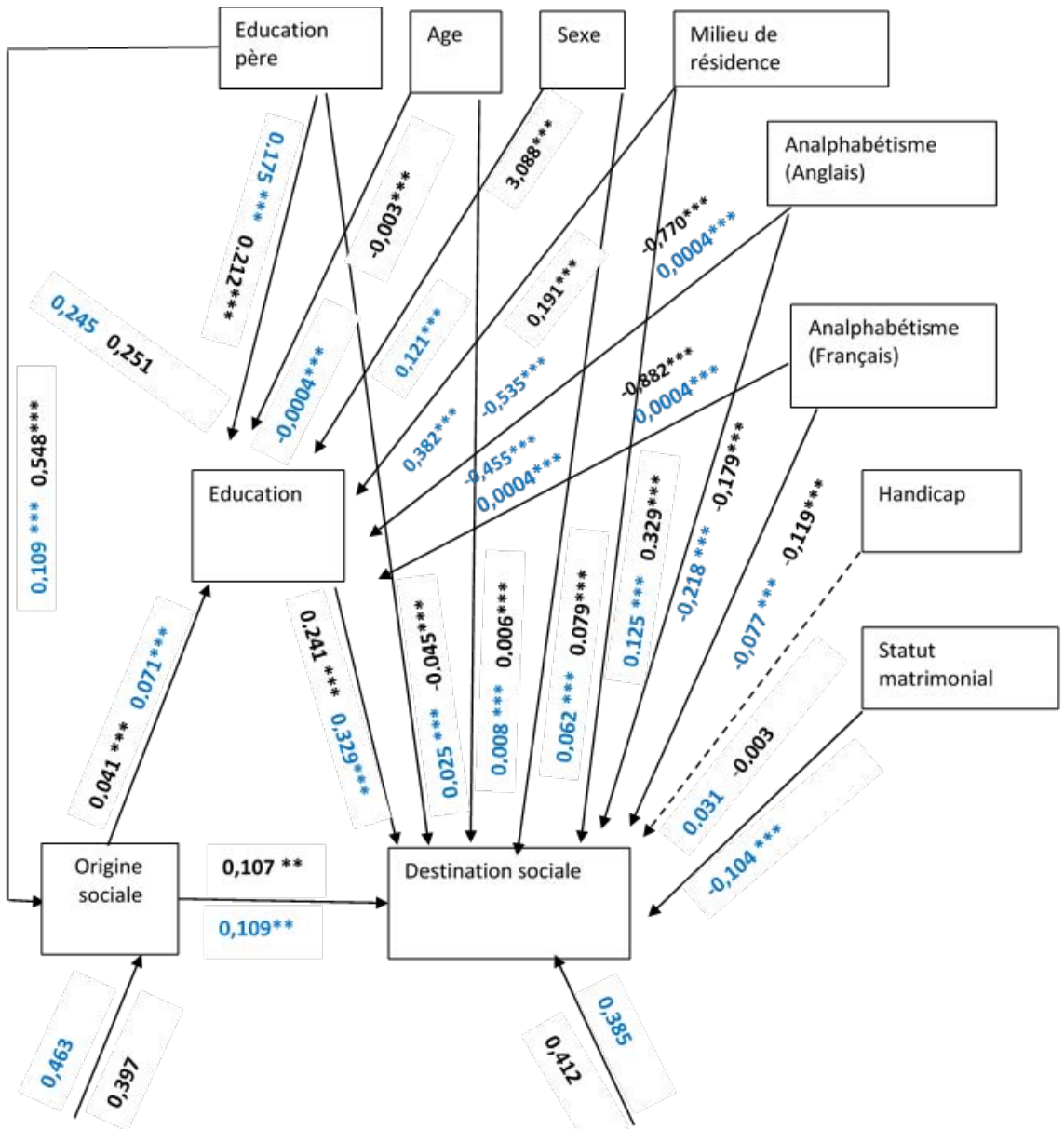
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Annexes

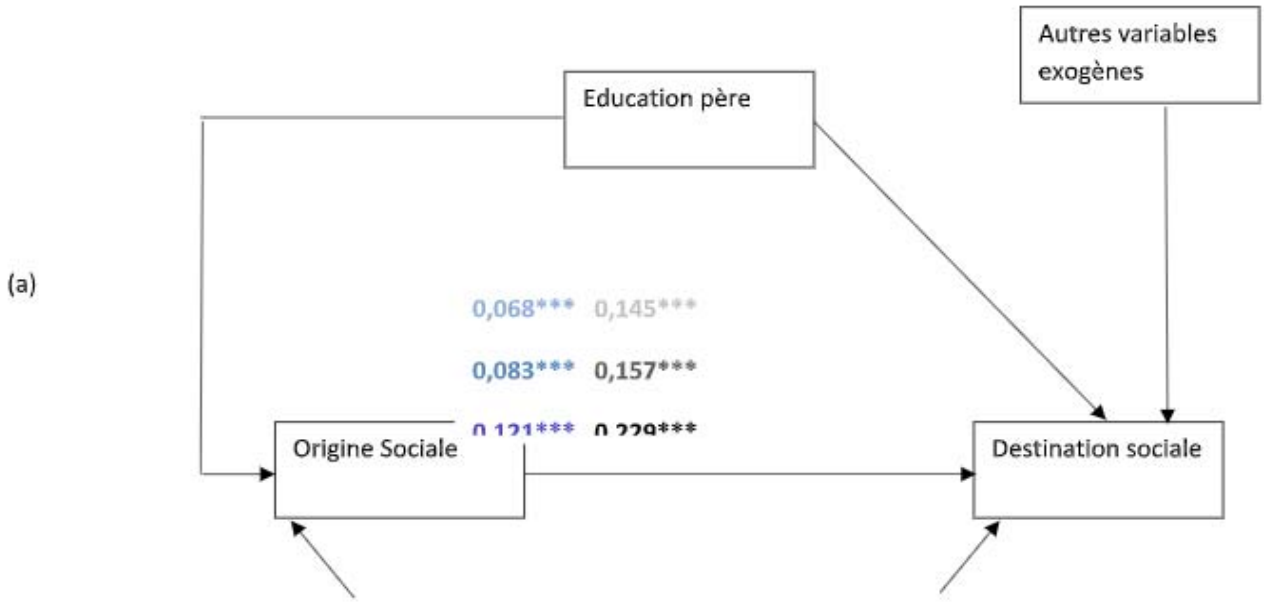
Annexe 1: Analyse des pistes causales de la mobilité intergénérationnelle entre 2005 et 2010



Lecture de la figure A.1: Les effets en noirs sont ceux de 2005, **en bleu ceux de 2010**. * significativité à 10%, ** significativité à 5% et *** significativité à 1

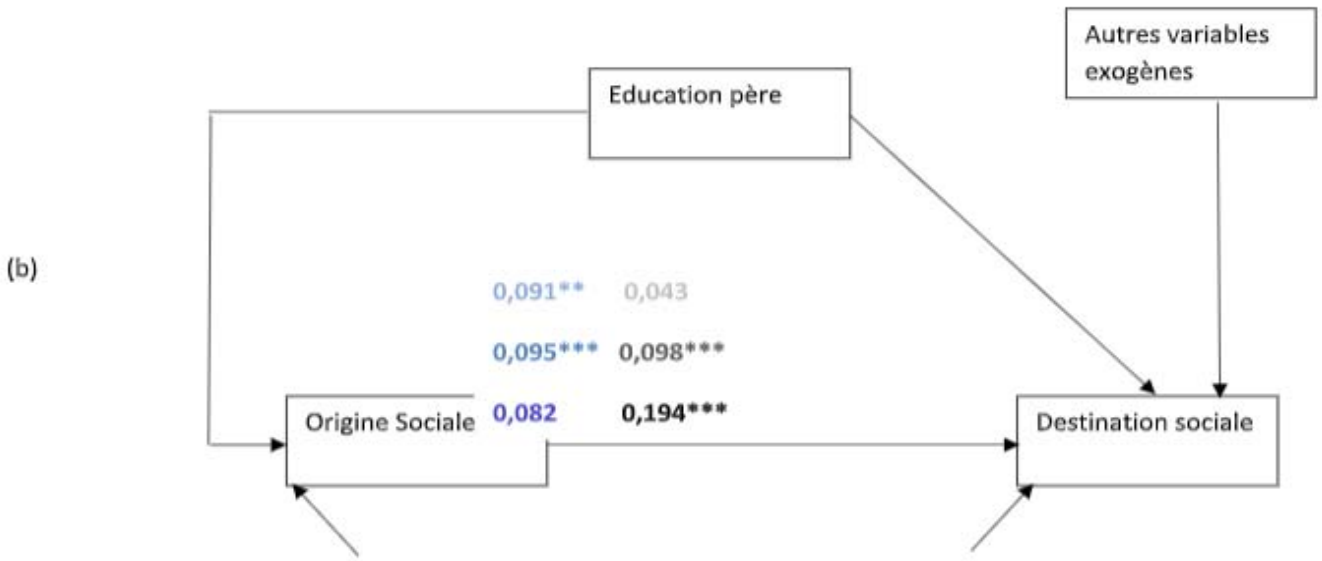
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Annexe 2: Modèles de pistes causales d'accès au secteur public selon 3 niveaux d'éducation (primaire, secondaire et supérieur) entre 2005 et 2010



*Lecture de la figure: Les effets en noirs sont ceux de 2005, en bleu ceux de 2010. Les effets les plus foncés et les plus en dessous sont ceux du supérieur, ensuite le secondaire et les moins foncés sont ceux du primaire. *** significativité à 1%. Les flèches en traits interrompus représentent un ensemble de variables exogènes parmi lesquels on retrouve: l'âge, le sexe, le milieu de résidence, le statut matrimonial, le niveau d'éducation du père, le statut d'handicap et d'analphabète (anglais et français) de l'enfant. Les effets de ces variables exogènes du modèle ne sont pas présentés ici par soucis de simplification.*

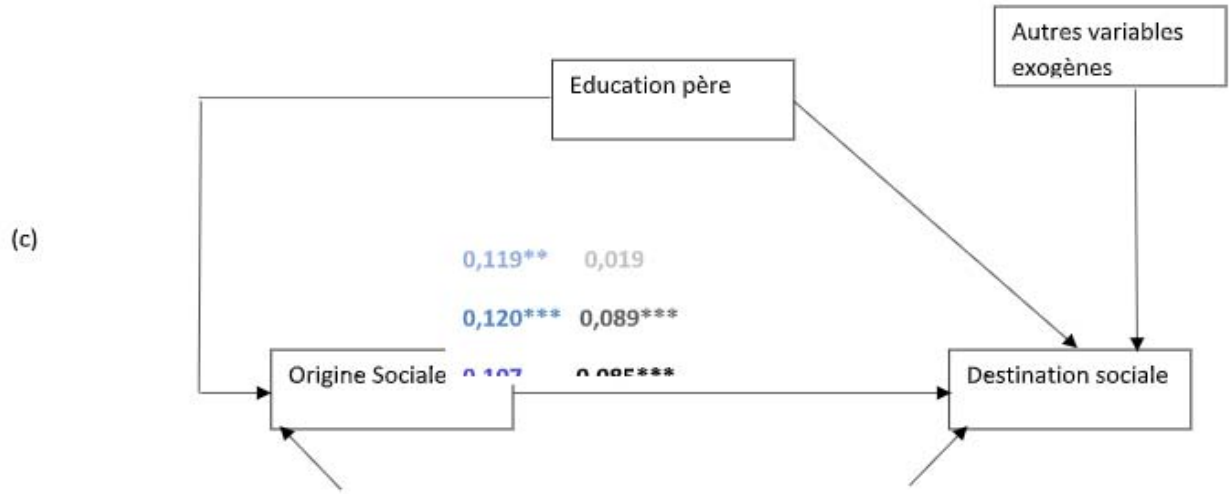
Annexe 3: Modèles de pistes causales d'accès au secteur privé formel selon 3 niveaux d'éducation (primaire, secondaire et supérieur) entre 2005 et 2010



*Lecture de la figure: Les effets en noirs sont ceux de 2005, en bleu ceux de 2010. Les effets les plus foncés et les plus en dessous sont ceux du supérieur, ensuite le secondaire et les moins foncés sont ceux du primaire. *significativité à 10%, ** significativité à 5% et *** significativité à 1%. Les flèches en traits interrompus représentent un ensemble de variables exogènes parmi lesquels on retrouve: l'âge, le sexe, le milieu de résidence, le statut matrimonial, le niveau d'éducation du père, le statut d'handicap et d'analphabète (anglais et français) de l'enfant. Les effets de ces variables exogènes du modèle ne sont pas présentés ici par soucis de simplification.*

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Annexe 4: Modèles de pistes causales d'accès au secteur informel selon 3 niveaux d'éducation (primaire, secondaire et supérieur) entre 2005 et 2010



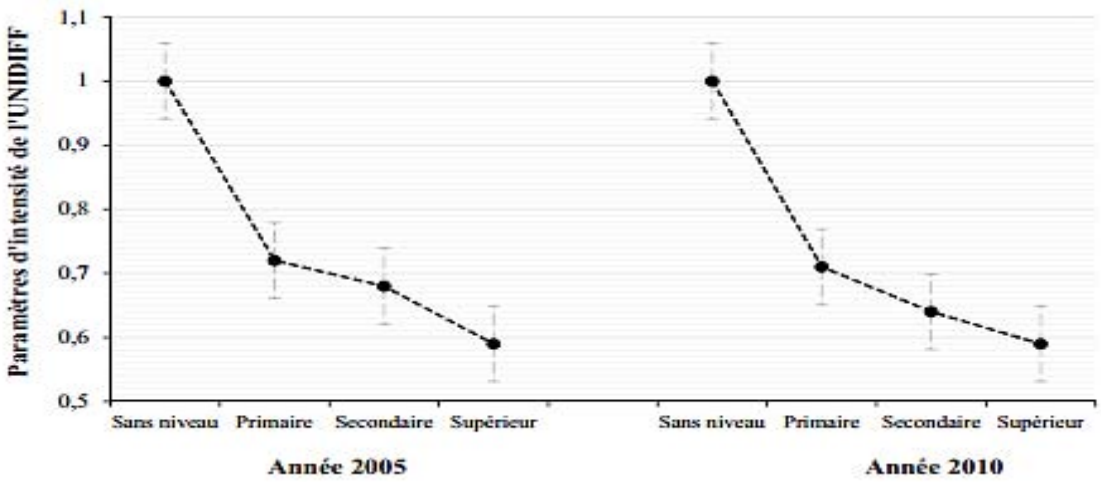
*Lecture de la figure: Les effets en noirs sont ceux de 2005, en bleu ceux de 2010. Les effets les plus foncés et les plus en dessous sont ceux du supérieur, ensuite le secondaire et les moins foncés sont ceux du primaire. * significativité à 10%, ** significativité à 5% et *** significativité à 1%. Les flèches en traits interrompus représentent un ensemble de variables exogènes parmi lesquels on retrouve: l'âge, le sexe, le milieu de résidence, le statut matrimonial, le niveau d'éducation du père, le statut d'handicap et d'analphabète (anglais et français) de l'enfant. Les effets de ces variables exogènes du modèle ne sont pas présentés ici par soucis de simplification.*

Annexe 5: Association (OED) avec des données d'Imputation Multiple

Modèles		N	df	rG^2	P	BIC	DI
Année 2005							
(1)	[OED=(OE)(ED)] (Indépendance Conditionnelle)	9210	16	0,00	0,00	49,0	4,6
(2)	[OED=(OE)(ED)(OD)] (Association constante OD)	9210	12	82,3	0,77	-75,0	1,1
(3)	[OED =(OE) (ED) β_E(OD)](Association constante)	9210	09	92,17	0,73	-68,0	0,6
Année 2010							
(1)	[OED=(OE)(ED)] (Indépendance Conditionnelle)	6697	8	0,00	0,00	36,9	3,2
(2)	[OED=(OE)(ED)(OD)] (Association constante OD)	6697	5	92,0	0,77	-53,1	0,6
(3)	[OED =(OE) (ED) β_E(OD)](Association constante)	6697	7	96,2	0,73	-39,9	0,3

Source: Auteur à partir de STATA 15

Annexe 6: Association OD selon le niveau d'éducation à partir des données d'Imputation Multiple



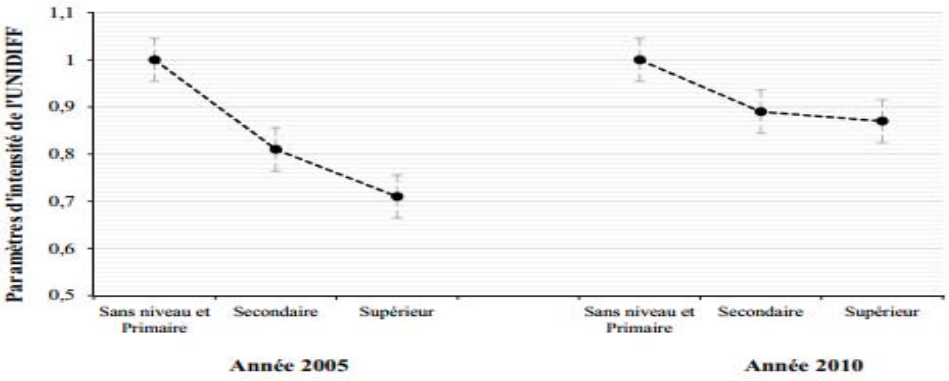
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Annexe 7: Modèles d'association (OD) selon le niveau d'éducation (E) à 3 modalités

Modèles						
Année 2005	N	df	rG^2	P	BIC	DI
(1) [OED=(OE)(ED)] (Indépendance Conditionnelle)	4440	12	0,00	0,00	7,1	4,9
(2) [OED=(OE)(ED)(OD)] (Association constante OD)	4440	8	79,6	0,00	-45,2	2,1
(3) [OED =(OE) (ED) β_E(OD)](Association constante)	4440	6	94,9	0,48	-44,9	0,9
Année 2010						
(1) [OED=(OE)(ED)] (Indépendance Conditionnelle)	4138	11	0,00	0,00	-1,2	3,9
(2) [OED=(OE)(ED)(OD)] (Association constante OD)	4138	7	95,5	0,77	-54,2	0,5
(3) [OED =(OE) (ED) β_E(OD)](UNIDIEF SUR OD)	4138	5	96,9	0,73	-38,8	0,4

Source: Auteur à partir de STATA 15

Annexe 8: Association OD selon le niveau d'éducation en 2005 et 2010

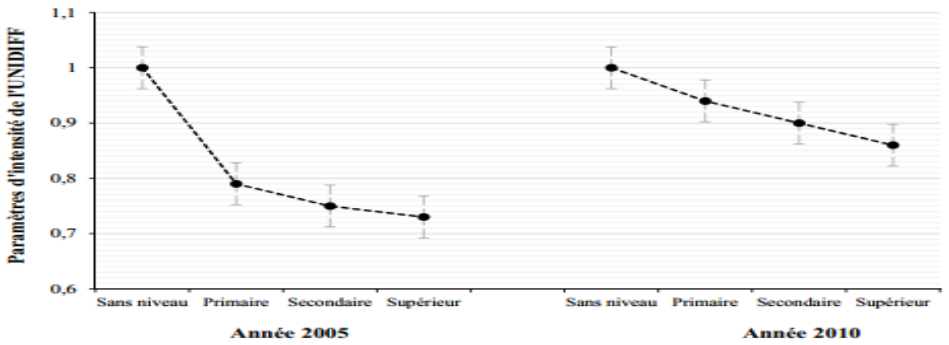


Annexe 9: Modèles d'association (OD) selon le niveau d'éducation (E) en 2005 et 2010

Modèles						
Année 2005	N	df	rG^2	P	BIC	DI
(1) [OED=(OE)(ED)] (Indépendance Conditionnelle)	4440	20	0,00	0,00	-160,0	3,5
(2) [OED=(OE)(ED)(OD)] (Association constante OD)	4440	21	68,7	0,12	-147,6	1,9
(3) [OED =(OE) (ED) β_E(OD)](Association constante)	4440	18	79,4	0,39	-132,2	1,4
Année 2010						
(1) [OED=(OE)(ED)] (Indépendance Conditionnelle)	4138	20	0,00	0,00	-54,0	5,9
(2) [OED=(OE)(ED)(OD)] (Association constante OD)	4138	16	79,4	0,11	-110,0	2,1
(3) [OED =(OE) (ED) β_E(OD)](UNIDIEF sur OD)	4138	14	83,8	0,20	-98,3	1,9

Source: Auteur à partir de STATA 15

Annexe 10: Association OD selon le niveau d'éducation en 2005 et 2010



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The Uncertainty of a Tripolar World: The Return of Militaristic Geopolitics and the Relevance of Geoeconomics in the First Decades of the 21st Century. A Brief Mention about the Russia-Ukraine Conflict

By Priscila Palacio
Universidad de Buenos Aires

Abstract- After the attacks of September 11, 2001, and the global paradigm shift that event produced, the world witnessed a resurgence of interest in geopolitics -especially, in its militaristic aspect, which came hand in hand with a new geoeconomics in the twenty-one century. The rise of China as a world economic power was accompanied by that country's intention to occupy an increasingly predominant international political role. For its part, the economic recovery of Russia, in the first decade of this millennium, revived the country's desire to rebuild the power that the Union of Soviet Socialist Republics once wielded. Both actors, eager to assume a leading international economic and political role, have collided on numerous occasions with the interests of the United States, a country that went from being considered a unipolar power to making explicit the great economic fragilities that have been undermining the foundations of its international power.

Keywords: tripolar world – United States – China – Russia – geopolitics – geoeconomics – Ukraine.

GJHSS-E Classification: DDC Code: 320.12 LCC Code: JC319



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The Uncertainty of a Tripolar World: The Return of Militaristic Geopolitics and the Relevance of Geoeconomics in the First Decades of the 21st Century. A Brief Mention about the Russia-Ukraine Conflict

La Incertidumbre De Un Mundo Tripolar: El Retorno De La Geopolítica Militarista Y La Relevancia De La Geoeconomía En Las Primeras Décadas Del Siglo XXI. Breve Mención Al Conflicto Rusia-Ucrania

Priscila Palacio[1]

Resumen- Tras los atentados del 11 de septiembre de 2001 y el cambio de paradigma mundial que ese acontecimiento produjo, el mundo atestiguó el resurgimiento del interés por la geopolítica - especialmente, en su aspecto militarista, que vino de la mano de una nueva geoeconomía en el siglo veintiuno. El auge de China, como potencia económica mundial, fue acompañado por la intención de ese país de ocupar un rol político internacional, cada vez más predominante. Por su parte, la recuperación económica de Rusia, en la primera década de este milenio, reavivó los anhelos de dicho país por reconstruir el poder que otrora supo ostentar la Unión de Repúblicas Socialistas Soviéticas. Ambos actores, ávidos de asumir un rol protagónico - económico y político internacional, han colisionado en numerosas oportunidades con los intereses de los Estados Unidos, país que pasó de ser considerado una potencia unipolar a explicitar las grandes fragilidades económicas que vienen socavando los cimientos de su poder internacional.

Como señalara Kenneth Waltz, el sistema tripolar es el más inestable de todos. De modo que, si el actual mundo tripolar tendiere a la conformación de un esquema bipolar, es necesario considerar que, aun cuando esa bipolaridad pudiere repetir mucho de lo que fue la Guerra Fría del siglo pasado, las connotaciones en el siglo en curso podrían ser diferentes. Al igual que en otras épocas históricas, la geopolítica del terror parece estar movilizando, nuevamente, las alianzas internacionales, lo que, inevitablemente, tendrá consecuencias para la geoeconomía del siglo veintiuno.

Palabras Clave: mundo tripolar – Estados Unidos – China – Rusia – geopolítica – geoeconomía –Ucrania.

Abstract- After the attacks of September 11, 2001, and the global paradigm shift that event produced, the world witnessed a resurgence of interest in geopolitics -especially, in its militaristic aspect, which came hand in hand with a new geoeconomics in the twenty-one century. The rise of China as a world economic power was accompanied by that country's intention to occupy an increasingly predominant international political role. For its part, the economic recovery of Russia, in the first decade of this millennium, revived the country's desire to rebuild the power that the Union of Soviet Socialist Republics once wielded. Both actors, eager to assume a leading international economic and political role, have collided on numerous occasions with the interests of the United States, a country that went from being considered a unipolar power to making explicit the great economic fragilities that have been undermining the foundations of its international power.

As Kenneth Waltz pointed out, the tripolar system is the most unstable of all. So, if the current tripolar world tends towards the formation of a bipolar scheme, it is necessary to consider that, even though this bipolarity could repeat much of what the Cold War of the last century was, the connotations in the current century could be different. As in other historical times, the geopolitics of terror seems to be mobilizing international alliances again, which will inevitably have consequences for the geoeconomy of the twenty-first century.

Keywords: tripolar world – United States – China – Russia – geopolitics – geoeconomics – Ukraine.

I. Introducción

Tras los atentados del 11 de septiembre de 2001 (11-S) y el cambio de paradigma mundial que ese acontecimiento produjo, el mundo atestiguó el resurgimiento del interés por la geopolítica - especialmente, en su aspecto militarista, que vino de la mano de una nueva geoeconomía en el siglo veintiuno.

El auge de China, como potencia económica mundial, fue acompañado por la intención de ese país de ocupar un rol político internacional, cada vez más predominante, concomitante con su creciente poderío económico mundial. Por su parte, la recuperación económica de Rusia, en la primera década de este

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milenio, reavivó los anhelos de dicho país por reconstruir el poder que otrora supo ostentar la Unión de Repúblicas Socialistas Soviéticas (URSS), bajo el liderazgo de Vladimir Putin quien -en ocasiones, manifestó no admitir la pérdida de prestigio que sufrió Rusia con la desintegración del bloque soviético. Ambos actores, ávidos de asumir un rol protagónico -económico y político internacional, han colisionado en numerosas oportunidades con los intereses de los Estados Unidos (EE. UU.), país que pasó de ser considerado una potencia unipolar y -según algunos, imperial (a comienzos de los años dos mil), a explicitar las grandes fragilidades económicas que han venido socavando los cimientos de su poder, como principal referente del capitalismo occidental.

Como señalara Kenneth Waltz (1979), el sistema tripolar es el más inestable de todos. Con el tiempo, es posible que dicha configuración tienda a volverse un esquema bipolar o un orden multipolar, considerando que estos últimos han representado las formas más características que asumió el sistema internacional, en los últimos dos siglos.

De modo que, si el actual mundo tripolar tendiere a la conformación de un esquema bipolar- como podría avizorar la alianza chino-rusa y el apoyo inicial que China concedió a Rusia frente a la incursión a Ucrania, es necesario considerar que, aun cuando esa bipolaridad pudiere repetir mucho de lo que fue la Guerra Fría del siglo pasado, las connotaciones en el siglo en curso podrían ser diferentes.

Al igual que en otras épocas históricas, la geopolítica del terror parece estar movilizando, nuevamente, las alianzas internacionales, lo que augura una escalada del rearme militar que, inevitablemente, tendrá consecuencias para la geoeconomía del siglo veintiuno.

II. El Retorno de la Geopolítica Militarista y la Relevancia de la Geoeconomía, en el Siglo XXI

En los albores del nuevo milenio, la geopolítica irrumpió con fuerza en la palestra mundial, tanto en el ámbito académico, como en la política de los grandes Estados.

Desde el punto de vista de las Relaciones Internacionales, se trata de una subdisciplina que, pese a su relevancia estratégica, fue marginada en los estudios de la academia occidental durante gran parte de la segunda mitad del siglo veinte, debido a su asociación con la política alemana del Tercer Reich[2]. "Muchos concluyeron que el estudio de la geografía en conjunción con la política significaba una obsesión con la estrategia, lo que a su vez representaba una predilección por la guerra y la conquista" (Evans & Newnham, 1998: 198-trad. propia).

La connotación militarista y ofensiva que se atribuyó a la geopolítica en los análisis de la segunda posguerra y, parte de la Guerra Fría, en cierto modo, tuvo su origen en el desarrolloque adquirió la disciplina bajo la influencia de Karl Haushofer[3] y, el rol que éste desempeñó como asesor y académico de Adolf Hitler (Evans y Newnham, 1998: 198). Sin embargo, varios autores -entre otros, De Mateo y Sousa (1993) y Borrell (2017), han cuestionado esa afirmación, señalando que, no fue del todo cierto que la estrategia de Hitler hubiese sido trazada por Haushofer y su grupo de influencia, ya que éste no quería la guerra y, mucho menos, contra la URSS.

Asimismo, es preciso señalar que el campo de estudio de la geopolítica comprende un ámbito de aplicación mucho más amplio y abarcativo que, el sólo referido al área geográfica y castrense. Se trata de un campo interdisciplinario que involucra diversos análisis, tanto de relaciones internacionales, economía, demografía, estudios ambientales, históricos, entre otros.

Por otra parte, aunque a partir de la década de 1970 se evidenció un resurgir de la importancia de la geopolítica, de la mano de Escuela francesa, los aportes de Henry Kissinger (Pérez Gavilán et al., 2017) y, más recientemente, debido al desarrollo de la *geopolítica crítica* (Contreras Polgati, 2007), en general, los autores coinciden en que el fin de la Guerra Fría pareció conllevar al definitivo desuso de la geopolítica durante los años noventa y, al reemplazo de esta por la *geoeconomía*[4]. Como expresaron Ó Tuathail & Dalby (1998), en muchos análisis, la geopolítica fue dada por muerta.

No es difícil comprender ese desplazamiento en los estudios de política exterior, cuando se consideran las grandes transformaciones económicas mundiales que acontecieron a finales del siglo veinte[5],

[2] En América Latina, además del efecto maligno y siniestro de la política de Hitler (parafraseando a Evans y Newnham, 1998), pareció evidenciarse -en ciertos sectores académicos, una tendencia a asociar la geopolítica con la *doctrina de seguridad nacional* que impulsaron los gobiernos militares, en la segunda mitad del siglo XX (Palacio, 2018).

[3] Retirado como Brigadier General del Estado alemán, en 1919, tras concluir la Guerra, se desempeñó como Jefe de editores de la "Zeitschrift für Geopolitik", publicación patrocinada por la Universidad de Múnich, además de ser Profesor de Geopolítica, Decano y Director del "Institutí für Geopolitik" en dicha institución académica. Entre 1934 y 1937 fue Presidente de la Academia Alemana y, en 1938, Presidente de la Organización Popular de Alemanes Residentes en el Extranjero (Warner et al., 2016: 157-8).

[4] Para algunos, considerada una subdisciplina de la geopolítica.

[5] A modo de muestra del creciente interés en los estudios económicos internacionales, se destaca que en los años 1970 nació la Economía Política Internacional, como disciplina autónoma.

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especialmente, tras el abrupto fin del orden bipolar. En los primeros años de la década del noventa, el vertiginoso avance de la globalización pareció obnubilar los conflictos geopolíticos, otrora asociados a la Guerra Fría. Los EE. UU. había emergido como el único vencedor de ese conflicto, aunque lo hizo sin pelear una contienda directa con la URSS, sino a causa de la implosión de este último bloque. Quizás por ello, varios analistas pasaron por alto que la economía estadounidense venía arrastrando un importante deterioro de algunos de sus cimientos macroeconómicos *(fundamentales)*, desde hacía varias décadas[6]. En los años noventa, todo pareció indicar que el capitalismo y la globalización se establecerían como el paradigma imperante a nivel mundial y, que la geoeconomía había subyugado a los intereses geopolíticos. La unipolaridad que se observó al iniciar la década, paulatinamente, dejó paso a un esquema más multipolar que se fue configurando con el surgimiento de varios actores internacionales -como la Unión Europea (UE), el Foro de Cooperación Económica Asia-Pacifico (APEC), la ampliación de la Asociación de Naciones del Sudeste Asiático (ASEAN), además de la conformación de diversos bloques regionales en otras latitudes, entre ellas, América Latina. Durante esos años, proliferaron los términos como *globalismo*, *sociedad global*, *aldea global*, que fueron acaparando las producciones del ámbito académico y político internacional. En cierto modo, reflejaban la percepción del cambio de época que se experimentó en esa década.

No obstante, para mediados de los años noventa, empezaron a evidenciarse los efectos negativos de la globalización: las crisis financieras en los mercados emergentes. Pese a ello, algunos autores continuaron pronunciándose como adeptos a dicho modelo economic -entre otros, Thomas L. Friedman que postuló la controvertida *Teoría de los Arcos Dorados de Prevención de Conflictos*.

En el curso de esa década, también proliferó el debate sobre la *gobernanza global* que, implicó que ciertos analistas advirtieran que los cambios globales estaban tornando anacrónica la estructura del Estado-nación westfaliano -tales como Ohmae (1997) y Strange (2003). No es de extrañar que, en ese contexto, varios aplaudieron el triunfo de la geoeconomía sobre la geopolítica.

> La geopolítica se fincaba en la fuerza de las armas y la "diplomacia del garrote", mientras que la geoeconomía se apoya en la razón y la negociación entre iguales. La geopolítica intentó predecir el futuro, en tanto que la geoeconomía busca encaminarlo hacia la prosperidad. La geopolítica tendía hacia el dominio mundial y la geoeconomía lo hace a la globalización económica. En suma, la geopolítica fue una ciencia del pasado. La geoeconomía lo es del porvenir […]. (De Mateo y Sousa, 1993: 978)

Aún así, algunos autores -entre ellos, Scholte (1997: 427-8) destacaron que, durante esos años, también surgieron refutaciones de quienes se resistían a la idea del fin del Estado y, afirmaban que los argumentos sobre globalización eran exagerados, porque los Estados continuaban reteniendo capacidades cruciales de gobierno, en el plano económico y político internacional. Como observaron Evans y Newnham (1998), en las postrimerías del siglo veinte, si bien a nivel internacional y, sobre todo en los EE. UU., todavía existía cierta negación al campo de estudio de la geopolítica, ya se empezaba a avizorar un resurgir del interés por la materia, en los estudios militares.

Más allá del debate académico, los acontecimientos terminaron por imponerse de modo drástico, en los inicios del siglo en curso. Al parecer, los más reticentes habían tenido razón: pese al vertiginoso avance de la globalización, su alcance fue parcial y limitado. Frente a ella, los Estados retuvieron su tradicional cuota de poder que tienden a sacar a la luz cuando las crisis económicas y/o de seguridad -doméstica o internacional, lo requieren.

Los atentados del 11-S marcaron un punto de inflexión en la historia mundial. La geopolítica irrumpió de manera abrupta, no sólo en los estudios sobre terrorismo y seguridad internacional, sino también, en la agenda gubernamental de los grandes Estados. Para Bergesen y Suter (2018), ese retorno no fue novedoso, sino que debe ser interpretado como el último giro cíclico de un proceso histórico mundial -más prolongado y abarcativo, al que dieron en llamar *Ciclo de Globalización/Geopolítica* (CGG). Según los autores, ese ciclo se evidenció desde épocas históricas, tanto en el período de la hegemonía británica (siglo XIX), como la estadounidense (siglo XX), y consiste en la transición del predominio de la globalización a la geopolítica, como la lógica dominante del comportamiento de los Estados a nivel internacional. Para los autores, el resurgir de la geopolítica está asociado a la revivificación de los intereses nacionales y los nacionalismos.

En el plano militar, la avasallante respuesta de los EE. UU. a los ataques del 11-S llevó a que ese país se perfilara como una potencia imperial que, nuevamente, trasladaba al mundo a un esquema unipolar -dejando atrás la imagen de aldea global que

[6] Recordemos que, ya Triffin (1962) alarmado por la crisis de balance de pagos de ese país, advertía el rápido deterioro que estaba evidenciando la economía de los EE. UU., desde la década de 1950. Por su parte, Thompson (2018), basándose en la evolución de algunos indicadores del poder de los Estados, también observó que el poderío de los EE. UU. fue declinando desde aquella década y, aunque ello no se evidencie desde la perspectiva militar, se traduce en el surgimiento de poderes desafiadores.

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se promovió durante los años noventa. Desde el punto de vista económico, la globalización empezó a ser cada vez más cuestionada -incluso, en el corazón de la economía capitalista (EE. UU.), no sólo por la difusión que adquirieron los movimientos antiglobalización, sino porque, varios Estados empezaron a retomar la senda del keynesianismo (en una especie de *neointervencionismo económico*).

El 11-S no sólo marcó un hito en la historia de los EE. UU., sino que conllevó a que algunos sectores (académicos, políticos y empresariales) vieran en la guerra el motor que posibilitaría recuperar el dinamismo de la economía estadounidense, sumida -por entonces, en una situación de estancamiento (Palacio, 2019-b)[7].

En los inicios del dos mil, adquirieron difusión obras como la de Hardt & Negri (2000) que señalaban la emergencia de una nueva forma de soberanía global. A ella la denominaron *Imperio* y, según los autores, se asentaba en la declinación de la soberanía Estatal, y su creciente incapacidad para regular intercambios económicos y culturales. Se trató de un concepto en estrecha relación con la globalización y gobernanza global, pero enfatizaba en la influencia del liderazgo estadounidense.

La percepción de configuración de una gobernanza global, bajo el liderazgo de los EE. UU., cobró sentido a raíz de la desproporcionada represalia que ese país llevó adelante, primero, con la incursión en Afganistán (2001) y, luego, a Irak (2003). Ambas incursiones revistieron características distintas a las guerras convencionales; se ejercieron contra un nuevo tipo de enemigo -los grupos terroristas, fundamentándose en la necesidad de prevenir la expansión del terrorismo internacional. En el caso de Afganistán, el Consejo de Seguridad de Naciones Unidas convalidó el derecho de los EE. UU. a recurrir a la legitima defensa[8]. Sin embargo, la guerra con Irak (2003) no contó con el consenso del Consejo de Seguridad. Algunos países europeos se opusieron a la invasión estadounidense a Irak, mientras que otros la apoyaron, lo que evidenció la existencia de grietas insalvables en materia de política exterior, al interior del bloque europeo (UE)[9].

El 11-S también mostró que las formas de conflicto habían mutado hacia nuevos paradigmas. El accionar de los EE. UU. dejó en evidencia que dicho país poseía la capacidad de imponer su voluntad unilateral, explicitando que la guerra seguía siendo el último resorte de poder en las relaciones internacionales.

Para algunos observadores, los ataques terroristas y las incursiones estadounidenses representaban la materialización del choque de civilizaciones que, a comienzos de los noventa, había pronosticado Samuel P. Huntington. Otros criticaron el accionar de los EE. UU. en el marco de la lucha contra el terrorismo internacional; no es de sorprender que la contrapartida de esas guerras fue la intensificación del debate sobre la ineficacia de las Naciones Unidas (NU). Las incursiones en Medio Oriente desencadenaron y/o profundizaron nuevos y viejos conflictos étnicos, religiosos y políticos en esa región. Fuera de Medio Oriente, la contrapartida fueron una serie de ataques terroristas, perpetrados en diversos países, varios de ellos, aliados a los EE. UU.[10].

En muchos aspectos, la geopolítica del siglo veintiuno resurgió asociada al esquema militarista, tanto por la lucha contra el terrorismo, como la seguridad internacional, e implicó desandar ciertos avances que el proceso globalizador pareció haber consagrado durante los años noventa. Pese a ello y, a los incontables cuestionamientos que se levantaron en contra de la globalización, en las primeras décadas de este siglo, no se puede afirmar que el mundo atestiguara la extinción de este fenómeno, ni un debilitamiento de la geoeconomía, en el sentido que la formulara De Mateo y Sousa (1993: 976), como el *gran espacio económico* o, dicho de otro modo, el espacio económico integrado en un *gran espacio económico vital*. Por el contrario, el campo de estudio de la geoeconomía viró hacia nuevos focos, para centralizarse en el auge de China y, en menor medida, de otros mercados emergentes, como el caso de Rusia[11].

Para finales de la primera década del dos mil, se evidenció un desprestigio de la estrategia militar de los EE. UU. Las incursiones en Afganistán e Irak habían pretendido asestar un golpe definitivo contra el terrorismo internacional, pero ambas guerras se prolongaron más allá de lo previsto, sin arrojar resultados contundentes en la lucha contra el terrorismo. Contrariamente, la estrategia militar

[7] Si bien el crecimiento de los años noventa le había permitido a ese país experimentar una situación de relativo auge económico, el estancamiento volvió a evidenciarse a finales del siglo pasado.

[8] La guerra contra Afganistán fue la primera reacción del gobierno de Washington al ataque del 11-S. Afganistán fue acusado cobijar a terroristas del grupo Al-Qaeda, ideólogos del mencionado atentado, y a su líder, Bin Laden. Los EE. UU., con la colaboración del Reino Unido llevó adelante los ataques que contaron con el apoyo de Canadá, Australia, Alemania y Francia, además de otros cuarenta países.

[9] Entre los países que desde un comienzo se pronunciaron en contra de la invasión a Irak encontramos a: Alemania, Bélgica, China, Francia, Rusia, Siria, y los Países No Alineados (114 países), entre otros; mientras que se pronunciaron a favor, el Reino Unido, España, Italia, Australia, Kuwait, Israel (aunque no participó de la guerra) y países del Este de Europa, entre otros (Palacio, 2019-b).

[10] La mayoría de esos ataques fueron auto-adjudicados por grupos terroristas.

[11] El crecimiento de los precios de las materias primas, entre otros del petróleo, fue un aliciente para que la economía rusa dejara atrás los funestos años de la década de 1990.

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estadounidense se convirtió en una pesada carga para la economía de ese país. Se añadió a ello, las erráticas políticas económicas domésticas que terminaron desencadenando la crisis internacional del 2008.

En la segunda década del siglo en curso, nuevos acontecimientos agravaron los conflictos en Medio Oriente, debido al surgimiento del ISIS (Islamic State of Iraq and Syria, autodenominado Estado Islámico -EI), el estallido de la llamada *Primavera Árabe*, la guerra civil en Siria (2011), entre otros. *A la pérdida de prestigio político internacional que afrontó los EE. UU., se sumó la pérdida de su poder económico mundial* (Palacio, 2019-a).

La crisis del 2008 trajo un nuevo replanteo del sistema económico y político internacional. La economía de los EE. UU. fue el epicentro de aquella crisis, aunque -a la postre, arrastró a otras economías desarrolladas y emergentes en una recesión mundial. En el caso de China, aunque experimentó una ralentización en las tasas de crecimiento de su PBI, la inercia del tamaño de su economía le permitió sostener, en cierto modo, la demanda externa e interna. Rusia, confiada en la reconstrucción de su poderío y proyección internacional, se vio involucrada en acontecimientos bélicos que, también, denostaron su prestigio y socavaron sus cimientos económicos, aun cuando de ambos ese país sacó alguna ventaja político- regional (la invasión de Georgia y el conflicto por Crimea)[12]. La apetencia territorial de Rusia y, su aparente intento de recuperar parte de lo que fue el gran territorio de la URSS, le llevaron a sufrir sanciones económicas internacionales, especialmente, luego de la anexión de Crimea y el apoyo que el gobierno ruso brindó a la secesión de algunas regiones de Ucrania, en la cuenca del Donbass.

III. La Inestabilidad Del Orden Tripolar: Los Estados Unidos, China y Rusia

El sistema mundial de Estados, integrado por actores con diferentes capacidades, objetivos e intereses, es proclive a generar una constante competencia por el liderazgo internacional (siempre relativo). Para los realistas, la competencia se asume como ineludible, ya que se considera inherente a la naturaleza humana y puede evidenciarse, tanto en el plano de la influencia o prestigio (soft-power), como en el de capacidades militares, económicas, demográficas, tecnológicas, entre otras (hard-power).

Desde el punto de vista histórico, en numerosas circunstancias, la competencia entre los Estados derivó en conflictos bélicos. Empero, en las últimas décadas, lo más frecuente fue que se expresara en términos de rivalidad por ejercer un rol preponderante y/o influencia en la escena política y económica internacional. De hecho, un indicador de esa competencia fue la mayor presencia que los países buscaron tener en los diversos acuerdos, foros y organismos existentes en el ámbito mundial.

Desde los años noventa del siglo veinte, tanto Rusia como China buscaron adquirir mayor protagonismo y representación en los principales acuerdos y entes multilaterales[13]. Sin embargo, más allá de esa participación internacional, no pudo desconocerse el interés de las potencias por intervenir en asuntos militares que atañen al orden internacional.

En la pos-Guerra Fría se evidenció que, contrariamente a lo predicho por Francis Fukuyama, el mundo estuvo lejos de consolidar un sistema de paz mundial y democracia internacional. Los conflictos bélicos continuaron, aun cuando, según los analistas, la mayor parte de estos fueron intraestatales, en lugar de interestatales. De manera similar a lo acontecido durante la Guerra Fría del siglo veinte, muchos de esos conflictos se registraron en países periféricos y, sus repercusiones fueron, a lo sumo, regionales. No obstante, en algunos de ellos se registró la participación de grandes Estados, ya sea en forma directa o indirecta (a través de organizaciones internacionales o regionales).

Como señaló Mearsheimer (2014), después de 1989, los políticos estadounidenses no tuvieron que preocuparse por pelear contra grandes poderes rivales, y tuvieron la libertad para involucrarse en guerras contra pequeños poderes. Los EE. UU. peleó seis guerras desde que terminó la Guerra Fría y, a partir del 11-S se abocó a la lucha global contra el terrorismo. Para el autor, entre los políticos estadounidenses hubo poco interés en la política de las grandes potencias, desde que la amenaza soviética se desvaneció. Sin embargo, observó que esa situación empezó a cambiar con el auge de China, ya que ese proceso tenía el potencial de generar un cambio fundamental en la arquitectura del sistema internacional.

Más allá de China, Rusia indudablemente figuró entre los grandes actores de la política mundial, en las primeras décadas de este siglo. El *mundo tripolar*, cuya configuración se explica desde la perspectiva económico-militar[14], ha incrementado las

[12] Las aspiraciones de Georgia y de Ucrania de unirse a la OTAN fueron algunas de las argumentaciones que adoptó Rusia para justificar las incursiones que transgredieron la soberanía de ambos Estados.

[13] China es miembro de la OMC desde 2001. Rusia se incorporó al FMI en 1992, y es miembro de la OMC desde 2012. China y Rusia empezaron a cooperar estrechamente con la OCDE desde el 2007, en el caso de Rusia con vistas a su futura adhesión a la organización. La negociación con Rusia se vio suspendida desde 2014. Sin embargo, China continúa cooperando con la OCDE, en carácter de socio clave.

[14] Los EE. UU. y China son las dos economías más grandes del mundo, pero los EE. UU. y Rusia representan los dos países con mayor poder nuclear, a nivel internacional.

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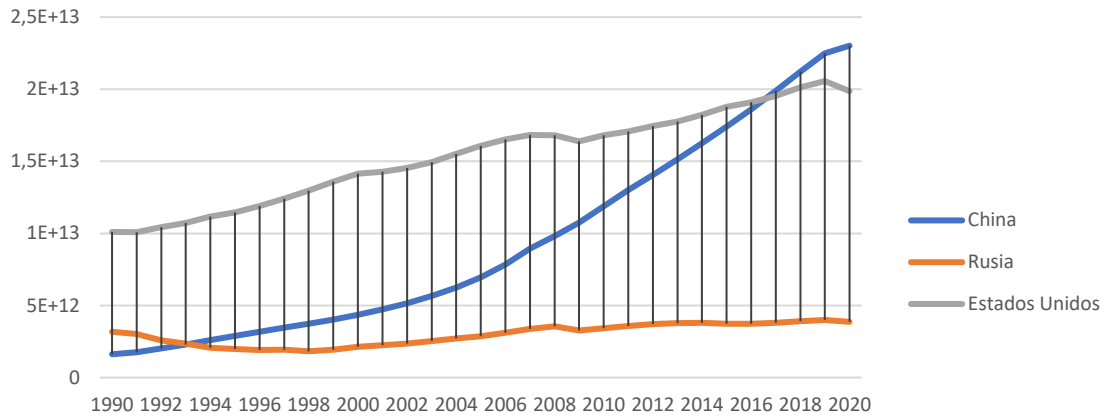
tensiones e incertidumbre en el sistema económico y político internacional, debido a que sus actores predominantes (los EE. UU., China y Rusia) poseen capacidades diversas y algunos intereses en conflicto.

a) El crecimiento asimétrico y la disputa del liderazgo

Desde el punto de vista estadístico, los indicadores son elocuentes del crecimiento asimétrico que experimentó China, con respecto a los EE. UU. y Rusia, en las primeras décadas de este siglo. Además, estos permiten comprender por qué proliferaron las controversias sobre qué país ejercería el rol de próxima potencia mundial, para los años venideros.

Ya desde comienzos del dos mil, algunos autores proyectaban que la economía china sobrepasaría a la estadounidense, convirtiéndose para 2050 en la mayor economía del mundo.

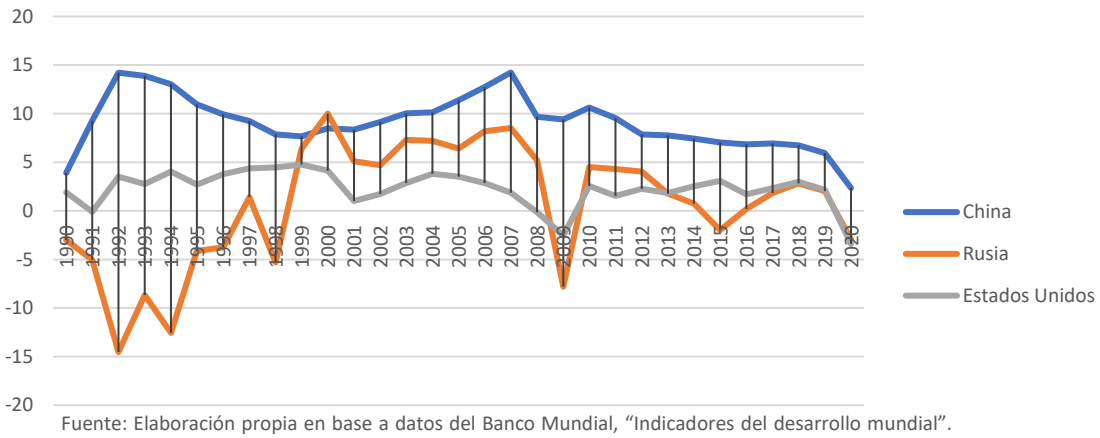
Gráfico N°1: PIB, PPA ($ a precios internacionales constantes de 2011)



Fuente: Elaboración propia en base a datos del Banco Mundial, "Indicadores del desarrollo mundial". https://datos.bancomundial.org/indicador/NY.GDP.PCAP.PP.KD?locations=CN-US-RU (consultado el 15/02/2022).

Como se observa en los gráficos N° 1 y 2, la economía de los EE. UU. evidenció un crecimiento sostenido durante gran parte de la década de 1990, pero se estancó y decreció hacia finales de ese período. Aunque el crecimiento retornó en el primer lustro del dos mil, la primera década finalizó con una pronunciada caída de su PBI, debido a la crisis iniciada en 2008. En la segunda década de este siglo, la economía de los EE. UU. recuperó su crecimiento, aunque a un ritmo más moderado que en los años noventa.

Gráfico N° 2: Crecimiento del PIB (% anual)



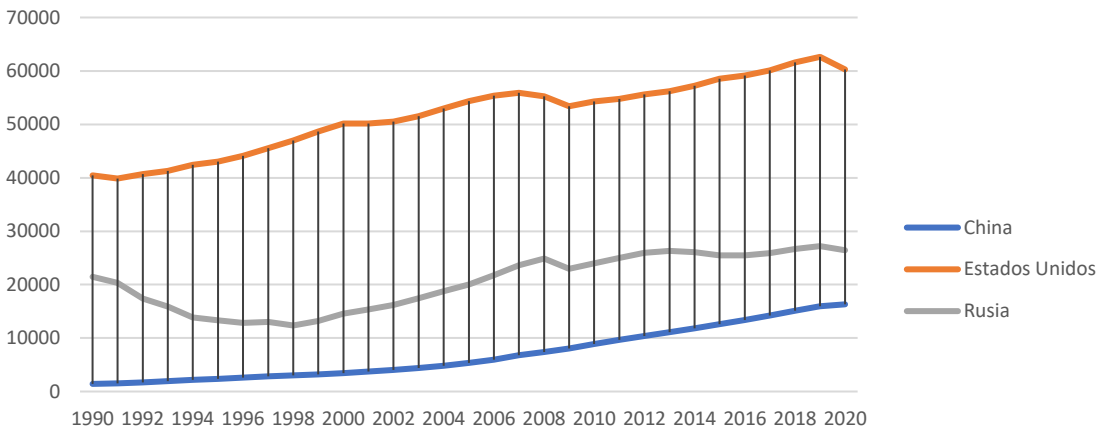
Fuente: Elaboración propia en base a datos del Banco Mundial, "Indicadores del desarrollo mundial". https://datos.bancomundial.org/indicador/NY.GDP.PCAP.PP.KD?locations=CN-US-RU (consultado el 15/02/2022).

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En lo que refiere a China, el crecimiento de su PBI fue exponencial, acelerándose desde comienzos del dos mil. Con la crisis del 2008, la economía de este país también se vio afectada, aunque sus tasas de crecimiento se mantuvieron muy por encima de los EE. UU. y Rusia. Por su parte, la economía de este último registró una recuperación entre 2000 y 2007, luego de atravesar una profunda recesión en los años noventa. Desde entonces, la economía rusa se halla prácticamente estancada, con bajos índices de crecimiento. Si se compara el PBI de China con el de los EE. UU., este pasó de representar el 16 %, en 1990, al 116 % en 2020, mientras que, el de Rusia pasó del 31.5% del de EE. UU., en 1990, al 19.51% en 2020, evidenciando un claro retroceso en términos relativos[15].

Asimismo, si la comparación se hace en términos de PBI per cápita (Gráfico N° 3), también, se evidencia que China registró un crecimiento sostenido que le permitió elevar el nivel de ingreso y occidentalización de su economía.

Gráfico N° 3: PIB per cápita, PPA ($ a precios internacionales constantes de 2011)



Fuente: Elaboración propia en base a datos del Banco Mundial, "Indicadores del desarrollo mundial". https://datos.bancomundial.org/indicador/NY.GDP.PCAP.PP.KD?locations=CN-US-RU (consultado el 15/02/2022).

Según se deriva de los datos que brinda el Banco Mundial, en 1990 el PBI per cápita de China (medido en PPA, a precios internacionales constantes de 2011) equivalía al 3.52% del de Estados Unidos; en 2020, ese porcentaje ascendió al 27%. Eso significa que, entre los años 1990 y 2020, el PBI per cápita de China creció un 1046%, mientras que el de Estados Unidos un 49% y Rusia sólo un 23%, en dicho período.

Otro indicador de relevancia, al analizar la solidez de una economía, es el nivel de reservas que ostentan los países (Gráfico N° 4). Desde el punto de vista de este indicador, la economía china claramente tiene una solidez que supera en forma contundente, tanto a los EE. UU. como a Rusia, países estos últimos que registran un nivel de reservas aproximadamente equivalente.

De modo que, el análisis económico-estadístico justifica el elevado interés que suscitó China en el siglo veintiuno y, su catalogación como posible potencia mundial. Además, explica la incertidumbre que algunos analistas han planteado sobre el futuro del sistema mundial actual, ya que el crecimiento económico asimétrico podría derivar en la disputa por el liderazgo del sistema internacional.

> China está en el camino correcto para convertirse en un formidable poder global. El tamaño de su economía se ha cuadruplicado desde que lanzó las reformas de mercado hacia fines de los años 1970 y, según algunas estimaciones, se duplicará de nuevo en la próxima década. […] El gasto militar de China ha crecido […] y su diplomacia ha extendido su alcance no sólo en Asia sino también en África, América Latina, y el Medio Oriente. Es más, mientras la Unión Soviética rivalizó con los Estados Unidos solamente como un competidor militar, China está emergiendo tanto como rival militar y económico – anunciando un profundo cambio en la distribución de poder global. (Ikenberry, 2008 –trad. propia).

Mearsheimer (2014 –trad. propia), por su parte, advirtió sobre los riesgos del desequilibrio, en caso de persistir el inexorable avance del coloso asiático frente al estancamiento del poder de los EE. UU.: "Si la economía China continúa creciendo en un ritmo enérgico en las próximas décadas, los Estados Unidos enfrentarán de nuevo un potencial par competidor, y la política de grandes poderes retornará con toda su fuerza".

[15] En estos datos está contemplada la caída que atestiguaron las economías en 2020, producto de la pandemia del Covid-19.

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En el caso de Rusia, aunque su economía había recuperado fortaleza en la primera década del dos mil, luego de la caída del precio del petróleo y las sanciones que se impusieron a ese país a raíz de la anexión de Crimea, su PBI se estancó en forma considerable. Más allá de su rol como uno de los principales proveedores energéticos del mundo, lo que ha inquietado a algunos analistas es la política revisionista de Rusia, sobre los países exsoviéticos. No obstante, el magro desempeño que arroja su economía, desde 2008, parece poner en cuestión su posibilidad de ejercer el rol de potencia mundial (más allá del poder militar que este país ostenta). *Rusia arrastra el estigma que, en cierto modo, signó su decadencia durante la Guerra Fría y, es que, pese a ser el territorio más grande del mundo, su economía se halla por debajo de las diez más importantes, en el ranking mundial*[16].

Por lo tanto, si se consideran las capacidades que debería ostentar una potencia a nivel internacional, la economía es, claramente, el talón de Aquiles de Rusia. Por ello, ya sea por necesidad y/o temor, los cálculos estratégicos parecen haber impulsado a este país a aliarse con su vecino -China, país con el que tuvo importantes diferendos y controversias en el pasado y, al cual, muchos rusos ven con cierto resquemor. La particularidad que reviste Rusia respecto a China es que, si bien este último representa la segunda potencia económica mundial, después de los EE. UU., el primero configura la segunda potencia nuclear, después de los EE. UU., a nivel mundial.

En la siguiente sección se indaga sobre algunos aspectos que permiten complementar este análisis económico internacional, con respecto al rol de China y Rusia. El propósito, es explicar, con mayor grado de aproximación, por qué ambos países podrían configurarse en potenciales desafiadores del liderazgo estadounidense y el statu quo internacional.

b) China y Rusia en la arena mundial. Breve mención al conflicto Rusia-Ucrania

Como, en su momento, señalara Jeffry Legro (2007: 515 –trad. propia), "[…] en los Estados Unidos hay, como dijo un Secretario de Estado Adjunto de EE.UU., una "caldera de ansiedad" sobre el futuro de China". A ello, hay que añadir la profunda recesión que atravesó la economía estadounidense, hacia finales de la primera década del dos mil. Si bien, en la segunda década, los EE. UU. experimentó una recuperación, su economía continúa evidenciando importantes fragilidades -tales como un elevado stock de deuda sobre PBI, además de la reciente aparición de un proceso inflacionario. Cabe recordar que, una porción de la deuda estadounidense se encuentra en poder de China, lo que ha generado una fuerte interdependencia económico-financiera entre ambos países, más allá del intercambio comercial bilateral. Para algunos especialistas, esa circunstancia podría condicionar la autonomía económica de los EE. UU., al colocar en manos de China parte de la decisión de estabilidad financiera de dicho país.

Por su parte, China consiguió que su moneda (renminbi–RMB) fuese incorporada a la canasta de monedas que componen los derechos especiales de giro (DEG) del FMI[17]. Se trató de un logro histórico para este país y, de un cambio trascendente desde el punto de vista monetario internacional. Empero, pese a la extraordinaria apertura y capitalización de su economía, China no flexibilizó su modelo ideológico y sociopolítico. Por el contrario, persisten profundas diferencias entre los EE. UU. y China que llevan a ciertos analistas a avizorar una inevitable confrontación entre ambos países.

> El realismo ofensivo ofrece importantes interpretaciones sobre el ascenso de China. Mi argumento en resumen es que si China continúa creciendo económicamente, intentará dominar Asia en el modo en que Estados Unidos domina el Hemisferio Occidental. Estados Unidos, sin embargo, irá muy lejos para prevenir que China alcance hegemonía regional. La mayoría de los vecinos de Beijing, incluyendo India, Japón, Singapur, Corea del Sur, Rusia, y Vietnam, se unirán a los Estados Unidos para contener el poder chino. El resultado será una intensa competencia de seguridad con considerable posibilidad de guerra. En pocas palabras, es improbable que el auge de China sea tranquilo. (Mearsheimer, 2014 –trad. propia)

A pesar de las inquietudes que explicitaron diversos académicos, la administración del presidente estadounidense Barack Obama (2009-2017) adoptó una postura de tolerancia frente al creciente predominio chino. Posiblemente, esa política obedeció a una conveniencia económica, ya que China financió parte del déficit de los EE. UU.

> En este caso, la situación era especialmente complicada debido al grado de interdependencia que habían adquirido nuestras economías. […] Los chinos poseían grandes cantidades de bonos del Tesoro de Estados Unidos, lo cual significaba que ambos estábamos profundamente involucrados en el éxito económico del otro. […] Pero, más allá de estos intereses compartidos, nuestros valores y visiones del mundo a menudo discrepaban; lo vimos en viejos puntos álgidos como Corea del Norte, Taiwán, Tíbet, los derechos humanos, y en nuevos desafíos como el cambio climático y las disputas en los mares de China Oriental y meridional. Todo esto llevaba a un difícil acto de equilibrio. Necesitábamos una estrategia responsable que alentara a China a participar como miembro responsable de la comunidad internacional, mientras nos manteníamos firmes en la defensa de nuestros valores e intereses. (Rodham Clinton, 2014: 49)

[16] Según el Banco Mundial, en 2020, la economía rusa ocupó el puesto número 11 entre las mayores economías del mundo, muy por debajo de la economía estadounidense y china (que ocuparon el primer y segundo puesto, respectivamente).

[17] Con vigencia a partir de octubre de 2016.

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Hillary Clinton sostuvo en sus memorias como Secretaria de Estado del entonces presidente Obama que "[… la prioridad de su gobierno] era reafirmar a Estados Unidos como potencia del Pacífico, sin crear una confrontación innecesaria con China" (Rodham Clinton, 2014: 53). Para algunos, esa postura respondió a un error de diagnóstico.

Los casi ciento cincuenta años de trastornos que enfrentó China, en los últimos siglos, parecen haber brindado a ese país condiciones diferenciales, las denominadas ventajas del atraso. Algunos sostienen que el propósito de China es recobrar el predominio que ejerció en los años previos a la era moderna. En términos de capacidades, China cuenta con un extenso territorio y una gran población. Pero fueron sus extraordinarios logros en materia económica, los que colocaron a ese país en la categoría de posible potencia mundial, disputando el puesto que los EE. UU. adquirió hacia finales de la Segunda Guerra.

Algunos se preguntan ¿cómo sería el panorama internacional ante una eventual hegemonía china? Como factor a favor del capitalismo, Ferguson (2012: 419) señala que el modelo de crecimiento capitalista-comunista adquirió gran legitimidad en la población china. Por ello, hay quienes consideran que, ante una eventual sucesión de liderazgo, el capitalismo quizás tenga el futuro garantizado bajo un eventual predominio de China.

El debate sobre la futura gobernanza global cobró relevancia en el seno de la academia china, desde comienzos del presente siglo. En *Rethinking Empire from a Chinese Concept 'All- under-Heaven' (Tian-xia)* (2006), Tingyang Zhao –un destacado filósofo chino, sostuvo que la concepción de gobernanza global de la tradición china *-All-under-Heaven* (*Tian-xia*), en castellano *Todos-bajo-el cielo*, es diferente a la de imperio que ha ostentado el mundo occidental. Para Zhao, dicha concepción podría contribuir de manera positiva y constructiva a repensar la mejor idea de un imperio aceptable. Según Zhao, el término *Todos-bajo-el cielo sería* equivalente al de *universo*, y consiste tanto de la tierra como de la gente. Así, sostuvo que un emperador no podría disfrutar realmente de un imperio Todos-bajo-el cielo, aun cuando conquiste vastas extensiones de tierra, a menos que tenga el apoyo sincero y verdadero de la gente de la tierra.

> El concepto de Todos-bajo-el cielo está pensado para ser un imperio de todo el mundo responsable por la felicidad común de toda la gente. Se refiere a un imperio teórico o conceptual que realmente nunca existió. […] Cada dinastía del imperio Chino ha tratado de aplicar el concepto de Todos-bajo-el cielo, pero nunca han sido capaces de realizarlo debido a limitaciones prácticas. Todos-bajo-el cielo significa un imperio muy diferente, que no necesariamente es un superpoder mundial, sino un mundo bajo una institución comúnmente aceptada, un plan para hacer del mundo un lugar de todos. (Zhao, 2006: 34 –trad. propia)

Varios occidentales han seguido de cerca el debate sobre el Tianxia en China. No falta quienes observaran en dicha postulación, una intención implícita de China por avanzar en la promoción de una nueva forma de gobierno mundial, bajo el predominio chino. Para Callahan (2008), la discusión sobre el Tianxia se volvió muy popular en la China del siglo veintiuno, incluso en modos que contradice la política china de auge pacífico en el sistema internacional. Si bien Callahan criticó algunas formulaciones de Zhao, sostuvo que su obra tenía trascendencia, no sólo como texto académico o filosófico. El poder e influencia de esta emergieron, no de sus argumentos -para algunos cuestionables, sino de la posición que han adquirido en la red de debates entre intelectuales públicos, estatales y líderes políticos, sobre el rol de China en el mundo como gran potencia. Además, señaló que, de acuerdo con los diccionarios clásicos y modernos, Tianxia significa también China; y consideró que ello explica la gran difusión que adquirió la obra de Zhao: "Tianxia es acerca de China, y sobre el rol de China en el mundo del siglo veintiuno -temas muy candentes en la RPC y entre los chinos del extranjero" (Callahan, 2008: 756 –trad. propia). Callahan sostuvo que, los debates en torno al Tianxia tuvieron como propósito demostrar al mundo, especialmente a Occidente, que China no es más un Estado revolucionario que desafía el orden internacional, sino un miembro responsable de la sociedad internacional. No obstante, observó que, paradójicamente, en la noción de Tianxia de Zhao, esa responsabilidad refiere a la creación de un nuevo orden mundial.

Otro interesante análisis sobre la incertidumbre que suscitó el crecimiento de China puede hallarse en la obra de Kissinger (2012). En dicha publicación, Kissinger expuso un paralelo -con el fin de establecer ciertas diferencias, entre la configuración del orden bipolar inflexible previo a la Gran Guerra y la situación que estaban observando muchos especialistas a ambos lados del Pacífico.

> […] Estados Unidos y China […] Los dos se han visto históricamente empujados hacia ideas de universalidad por sus logros económicos y políticos y por la energía y autoconfianza incontenibles de sus pueblos. […] Crowe tal vez advertiría de que cuando coinciden dos entidades de este calibre en la arena mundial, lo más probable es que se produzcan tensiones importantes. […] Estados Unidos se centra más en el arrollador poder militar; China, en el impacto psicológico decisivo. (Kissinger, 2012:533-4)

Según Kissinger, las relaciones entre los EE. UU. y China no tendrían que convertirse en un juego de suma cero. Además, consideró que, cuando se enfatiza en el auge de China se está dando por sentado que su extraordinario crecimiento se proyectará indefinidamente, así como el relativo estancamiento de EE. UU. Empero, argumentó que:

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> Un país que se enfrenta a unas tareas internas de tanta envergadura no va a lanzarse así como así a una confrontación estratégica, ni a la búsqueda del dominio universal. […] Los líderes contemporáneos conocen perfectamente la destrucción que son capaces de desencadenar. La competición clave entre Estados Unidos y China probablemente será más económica y social que militar. […] Estados Unidos tiene la responsabilidad de mantener su competitividad y su papel en el mundo. (Kissinger, 2012: 538)

Otros análisis enfatizaron en las cualidades que, tradicionalmente, revisten las potencias hegemónicas, en términos de capacidad militar y espíritu conquistador. Como evidencia su historia, China fue un país sin tradición de conquistador y víctima de intentos de conquista por parte de otros Estados. Aun así, en los últimos años China inició un rearme militar, aunque lo presenta como parte de una estrategia defensiva para ese país.

Al igual que Alan Greenspan (2008), Robert Kagan (2012) opinó que los EE. UU. tiene una capacidad innata de autorecuperación (resiliencia) que se explicita al tocar situaciones límites. Aun así, sostuvo que: "Al presente, sólo se puede decir que el crecimiento de la economía de China tiene implicaciones para el poder Americano en el futuro, sólo en la medida que los Chinos traduzcan una parte suficiente de su fuerza económica creciente en fuerza militar" (Kagan, 2012: 109 –trad. propia).

Pero no todos los analistas acuerdan en ese análisis. Hay quienes expresan escepticismo respecto a la posibilidad de supervivencia de un liderazgo estadounidense para el presente siglo. Lo cierto es que, de plantearse un escenario en el que prosiga el fortalecimiento de China frente a los EE. UU., muchos perciben que entrará en disputa el liderazgo del sistema internacional. Sin embargo, no hay consenso sobre las dimensiones que dicha crisis podría alcanzar, ni el desenlace que podría tener. Para una parte de la academia, especialmente para el realismo ofensivo, el crecimiento desigual podría transportarnos a las puertas de un enfrentamiento bélico de magnitud impredecible.

Frente a los pronósticos belicistas, Arrighi (2010) destacó que China lanzó en 2003 la doctrina de emerger precipitadamente en un modo pacífico (*heping jueqi*). Según dicha doctrina, China evitaría la postura agresiva de los poderes emergentes anteriores, aspirando a crecer y avanzar sin modificar los órdenes existentes. Para el autor, los funcionarios chinos no ven contradicción entre su doctrina de desarrollo pacífico y su determinación de desarrollar fuerzas armadas más competentes.

Como señaló Gilpin (1981, citado por Palacio, 2019-a), la predicción en ciencias sociales es imposible, pero la información histórica nos permite proyectar escenarios probables, a fin de reducir la incertidumbre asociada al futuro. Aun así, Gilpin reconoció que la sola decisión de un líder puede cambiar completamente los pronósticos académicos.

Por último, hay quienes se inclinan a postular que el capitalismo subsistiría, aun cuando China gane terreno en el liderazgo internacional. El éxito económico de ese país fue debido al sistema capitalista, incluso - en los últimos años, China se lanzó a una prolífica política de inversión en el exterior que algunos dieron en llamar nuevo imperialismo. Aún así, muchos consideran que los desafíos para China son múltiples y generan dudas sobre su real ascenso como potencia mundial. La pandemia del Covid-19 que se inició en ese país, a finales de 2019 y se esparció por todo el globo - llegando hasta la actualidad, tuvo un impacto en el prestigio internacional de China. Todavía persisten los cuestionamientos sobre cómo se inició la propagación del virus y respecto del manejo de la información que hizo el gobierno chino en los primeros meses de la pandemia. Claramente, el accionar poco transparente del gobierno chino provocó un retraso en la respuesta que la Organización Mundial de la Salud y los demás países pudieron adoptar, frente a la propagación del virus. Por otra parte, la pandemia tuvo en elevado costo para la mayoría de los países del mundo, no sólo en términos de vidas humanas, sino también, económicos, sociales y políticos. Inevitablemente, China cargará con el estigma de haber sido el foco de difusión de una pandemia que marcó a una generación, en los inicios de la tercera década del dos mil. Ello erosionó parte de la reputación mundial que, tan trabajosamente, procuró construir ese país en las primeras décadas de este siglo.

En lo que refiere a Rusia, el nuevo milenio empezó a transitarse no exento de conflictividad e incertidumbre. Entre otros aspectos, resurgió la inquietud de algunos analistas sobre el rol que pretende desempeñar Rusia a nivel internacional. Como se mencionó anteriormente, el crecimiento económico de los primeros años dos mil le permitió a ese país revertir la debacle que atravesó durante los noventa. Rusia se posicionó como mercado emergente, adquiriendo un importante protagonismo político y económico internacional, no sólo como parte del denominado grupo *BRIC* (Brasil, Rusia, India y China) que agrupaba a potencias intermedias, sino como miembro del G8 (G7 + Rusia). Por otro lado, en materia de política exterior, Rusia apoyó desde un comienzo la campaña de lucha contra el terrorismo que embanderó los EE. UU., aunque no tardaron en surgir desavenencias entre ambos países. Las mismas se explicitaron a partir de la incursión estadounidense a Irak y se ampliaron con la intervención rusa en Georgia[18].

[18] La incursión a Georgia empezó el 7 de agosto de 2008, tras la decisión del presidente de ese país, Mijail Shaakashvili, de recuperar territorios rebeldes, independientes de facto, pero dependientes de Rusia: Osetia del Sur y Abjasia. Rusia llevó adelante una ofensiva militar aplastante contra Georgia que, en cinco días, acabó con la resistencia georgiana (Palacio, 2019-a).

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La incursión rusa contra Georgia fue criticada por gran parte de la comunidad internacional. Aun así, pese a los cuestionamientos internacionales, en 2014, Rusia desplegó una nueva estrategia revisionista, anexándose Crimea[19]. Como con Georgia, la disputa por Crimea provenía desde la desintegración de la URSS. La anexión de Crimea por parte de Rusia, aunque democrática desde el punto de vista de las aspiraciones de la población de esa región-mayoritariamente rusa, fue desconocida por NU y los grandes jugadores de la comunidad internacional. La incursión rusa tuvo importantes consecuencias para ese país. Las mismas incluyeron desde sanciones económicas impuestas por los EE. UU. y la UE, hasta la suspensión de su participación como miembro del G8 -que volvió a ser G7, y como cooperador de la OCDE (Palacio, 2019-a)[20]. Además, luego de Crimea, otras dos regiones ucranianas de la cuenca del Donbass (Donetsk y Lugansk) se autoproclamaron repúblicas y solicitaron su incorporación a Rusia, ocasionando un estado de conflicto permanente en Ucrania, desde 2014.

Con la llegada de Donald Trump a la presidencia de los EE. UU., en 2017, su gobierno adoptó una geopolítica distinta a la de su predecesor (Obama). En lo que respecta a China, el gobierno estableció una política de confrontación directa -especialmente, en el plano económico (denominada *guerra comercial*); sin embargo, con Rusia entabló una relación de inusitado acercamiento y tolerancia, llegando -incluso, a producirse investigaciones en el ámbito político interno, respecto a la posible injerencia que pudo haber tenido Rusia en la política doméstica de los EE.UU. y, respecto del presunto apoyo que el gobierno ruso pudo haber brindado para el triunfo electoral de Trump, en las elecciones de 2017.

Sin embargo, tras la derrota electoral que experimentó Trump en su aspiración de reelección presidencial y, la asunción de Joe Biden como presidente de los EE. UU., a inicios de 2021, ese país experimentó otro giro geopolítico. Las relaciones de los EE. UU. con Rusia se volvieron a tensar y, significativamente, entre enero y abril de ese año, Rusia empezó a trasladar tropas a la frontera con Ucrania y a la península de Crimea, en lo que el secretario general de la OTAN-Jens Stoltenberg, definió como "la mayor acumulación de tropas rusas desde la anexión de Crimea" (El País, 01/03/22).

Entre los últimos meses de ese año y comienzos de 2022, el conflicto Rusia-Ucrania evidenció una escalada, derivando en la incursión rusa al territorio de este último, iniciada el 24 de febrero de 2022. La guerra entre Rusia y Ucrania trajo importantes desafíos para los países de Occidente y Oriente, ya que, no sólo puso, nuevamente, en cuestión el rol de la Comunidad internacional para frenar la incursión de una potencia en un país menos desarrollado[20], sino el de la OTAN frente a su histórico rival. Además, pese al apoyo que expresó China hacia Rusia, en los inicios de esa incursión, la misma representa un importante dilema para la seguridad internacional y la relación Rusia-China.

Desde la argumentación rusa, la incursión se justificó en nombre de la desmilitarización de Ucrania, la defensa de los derechos humanos en las autoproclamadas repúblicas de la cuenca del Donbass (prorrusas)[22], pero -fundamentalmente, por la amenaza que representaría para la seguridad rusa, la incorporación de Ucrania a la OTAN. Desde el punto de vista de Ucrania y, la mayor parte de la Comunidad internacional, Rusia se convirtió en un estado agresor que transgredió los principios del derecho internacional y la soberanía de Ucrania.

Lo cierto es que, tanto los EE. UU., como la UE, decidieron -hasta el momento, no intervenir directamente en el conflicto y reaccionaron imponiendo severas sanciones económicas y de otra índole a Rusia, con el fin de aislar a ese país del sistema internacional. Por su parte, China continuó jugando un papel de apoyo implícito al gobierno ruso, enfatizando en la necesidad de buscar una salida diplomática al conflicto, pero absteniéndose de condenar la invasión rusa a Ucrania, en el Consejo de Seguridad.

Aunque varios analistas observan con desconfianza la vinculación entre Rusia y China, los antecedentes de esta provienen desde 1996, cuando Rusia, China, Kazajstán, Kirguistán y Tayikistán conformaron el Grupo Shanghái (Shanghai Five), con el propósito de fortalecer la confianza en materia de seguridad y el desarme en regiones fronterizas. El

[19] El conflicto entre Rusia y Ucrania se inició el 21 de noviembre de 2013, cuando el presidente ucraniano, Víctor Yanukovich, decidió desestimar el Acuerdo de Asociación con la UE, para reforzar relaciones con Rusia. Entre fines de 2013 y comienzos de 2014, ocurrieron numerosas manifestaciones en contra de Yanukovich. El 22 de febrero, el Parlamento ucraniano destituyó a Yanukovich y designó presidente interino a Alexander Turchinov. Turchinov reclamó a Rusia por la injerencia armada en Crimea -que había sido aprobada por el Parlamento ruso a pedido de Putin. Mientras Crimea se proclamaba independiente, el referéndum para solicitar su incorporación a Rusia se realizó el 16 de marzo. Al día siguiente, Crimea solicitó su formal incorporación a Rusia, que fue aceptada el 18 de marzo (Palacio, 2019-a).

[20] Pese a ello, varios analistas acuerdan en que los mayores perjuicios fueron para Ucrania, país que vino lidiando entre la dependencia económica de Rusia y sus aspiraciones de integrarse a la UE y la OTAN.

[21] Como en su momento ocurrió con las incursiones estadounidenses en Medio Oriente.

[22] Donetsk y Lugansk, cuya independencia fue reconocida por Rusia el 21/02/2022.

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Grupo Shanghái propició una creciente convergencia de la agenda de Beijing con la de sus vecinos del Oeste y fue el germen de la Organización de Cooperación de Shanghái (OCS), creada en junio de 2001 por los cinco participantes del diálogo fronterizo - China, Rusia, Kazajstán, Kirguistán y Tayikistán, más Uzbekistán[23].

La OCS se creó con el propósito de construir una nueva estructura de seguridad regional que permitiera consolidar la integridad territorial de cada Estado miembro[24]. Entre sus objetivos figuran, además, la lucha contra el terrorismo, el separatismo y el extremismo[25], problemas con los que han venido lidiando algunos de los miembros más relevantes de la organización.

Sin embargo, para algunos analistas, el propósito de la OCS fue cercar la influencia de Occidente, contrarrestando la hegemonía de los EE. UU. en Asia central y la región Euroasiática. Otros postularon que, aun cuando hay una aparente convergencia de intereses entre China y Rusia, líderes de la OCS, en el fondo se avizora una aspiración de China de convertirse en el hegemón regional, sustituyendo el predominio de Rusia en la región (Larpin, 2011: 50-1). Incluso, podría argumentarse que las desavenencias entre sus dos socios mayores, Rusia y China, fueron responsables de los magros progresos que registró la OCS en sus dos décadas de existencia (Alonso Marcos & Nurimbetov, 2021).

Empero, no debe menospreciarse la trascendencia de la alianza chino-rusa, considerando que se trata regímenes históricamente confrontados. Por ello, la incursión rusa en Ucrania abre un nuevo escenario en la geopolítica del siglo veintiuno, ya que, más que plantearse una rivalidad implícita y/o indirecta (en términos económicos y de poder blando), como atestiguó el mundo en las primeras dos décadas de este siglo, parece resurgir el fantasma de una nueva Guerra Fría, con otras particularidades, donde, además de reabrirse la carrera por el rearme militar (Paz Armada), hay tres colosos que parecen tener intereses en conflicto, lo que incrementa la incertidumbre sobre la estabilidad del sistema actual.

Desde el análisis geoestratégico, posiblemente, la demanda rusa por el expansionismo de la OTAN hacia el Este pudo hallar su justificación desde la perspectiva de seguridad de aquel país[26]. Pero, lo cierto es que la imprevisión con que se realizó la incursión, además de la asimetría de poder existente entre Rusia y Ucrania, han representado no sólo un reto para Occidente, sino una muestra de fuerza para la propia China.

Indefectiblemente, Rusia pagará un costo elevado por esa incursión, aun cuando consiguiere algunos de sus objetivos, incluso, evitar la posibilidad de ingreso de Ucrania a la OTAN[27]. No sólo su economía -que ya estaba estancada desde hace una década, será afectada, sino que se tornará más dependiente de China y algunos aliados poco relevantes en la escena internacional que apoyan a Rusia desde otras latitudes[28]. Por otra parte, su prestigio está cada vez más denigrado, no sólo por el cuestionamiento que levantó la incursión rusa en distintas partes del mundo, sino porque la misma parece haber puesto en evidencia algunas falencias en el poderío militar de ese país.

Si volvemos la mirada al pensamiento de Robert Gilpin, podríamos decir que Rusia,posiblemente, percibió algunas precondiciones que aparecen asociadas al estallido de una *guerra hegemónica*, entre otras: a) el cierre del espacio y oportunidades que acontece cuando un sistema internacional madura y, la expansión de los Estados produce que la distancia entre ellos decrezca, llevando las relaciones a un juego de suma cero; y b) la percepción de que un cambio histórico fundamental está teniendo lugar y, que el poder dominante desafiado no tiene otra opción que la guerra hegemónica, ya que, las alternativas disponibles para un Estado cuyo poder está siendo eclipsado son, comprometerse en una guerra mientras el balance está todavía en favor del estado, o involucrarse en la guerra después, cuando la marea pueda haberse tornado en contra de él (Gilpin, 1981, citado por Palacio, 2019-a: 107-8).

Para el poder declinante, la guerra hegemónica es más un instrumento para minimizar pérdidas que para maximizar ganancias. Por ello, desde el análisis *gilpiniano*, hay quienes podrían argumentar que Rusia fue empujada a tomar la decisión de incursionar en Ucrania en momentos en que, no sólo su poder está declinando (fundamentalmente, desde el punto de vista

[23] La OCS cuenta con nueve miembros, considerando que, en 2017, adhirieron India y Pakistán, y, en 2021, se concretó la adhesión de Irán como miembro de esa organización (Anadolu Agency-AA, 17/09/21).

[24] Según la *Declaración sobre el Establecimiento de la Organización de Cooperación de Shanghai* (2001), los estados miembros de la Organización de Cooperación de Shanghai adhieren firmemente a los propósitos y principios de la Carta de las Naciones Unidas, principios de respeto mutuo por la independencia, soberanía e integridad territorial, igualdad y beneficio mutuo, resolución de todos los problemas a través de consultas mutuas, no injerencia en asuntos internos, el no uso o la amenaza del uso de la fuerza militar y la renuncia a superioridad militar unilateral en áreas vecinas.

[25] Tal como surge de la *Convención de Shanghái sobre la lucha contra el terrorismo, el separatismo y el extremismo* (2001).

[26] En ocasión del conflicto por Crimea, Kissinger (The Washington Post, 05/03/2014) sostuvo que Ucrania no debía unirse a la OTAN, considerando no sólo la posición geoestratégica de ese país -en la frontera entre Oriente y Occidente, sino la larga relación histórica, política y cultural que Ucrania mantuvo con Rusia, desde hace siglos.

[27] A la actualidad, no era viable que se concrete el ingreso de Ucrania como miembro de la OTAN.

[28] Como el caso de Venezuela, Nicaragua, entre otros.

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económico), sino que, también, desde hace tiempo está en debate el declive del poder de los EE. UU.; por otro lado, todavía la OTAN no estaba consolidada a lo largo de la frontera rusa, ya que Ucrania no era aún miembro de esa organización. De modo que, la decisión de enfrentarse a Ucrania (sola) versus enfrentar a Ucrania como parte de la OTAN, claramente, tenían costos diferentes para Rusia en el corto plazo.

Desde la perspectiva histórica, la situación del sistema internacional actual parece evocar aquella que Edward Hallet Carr observaba en algunos países de Europa, hacia finales de la década de 1930, cuando afirmó que predominaba más el idealismo que el realismo. Además, también resuena la argumentación de Charles Kindleberger sobre la necesidad de un hegemón para garantizar la estabilidad del sistema internacional. Posiblemente, la falta de un hegemón es otro factor que pudo haber ponderado Rusia, al tomar la decisión de transgredir la soberanía de Ucrania.

Por último, los acontecimientos bélicos que tuvieron lugar entre la desaparición del orden bipolar y las primeras décadas del siglo veintiuno, incluyendo la incursión de Rusia en Ucrania, ponen en evidencia la anacronía y fragilidad del esquema institucional mundial que se organizó en la segunda posguerra que, pese a sus logros acotados, ha derivado más en una monstruosa burocracia sostenida por los Estados a nivel internacional que, en un sistema efectivo para garantizar la estabilidad y la paz mundial. Nuevamente, la ausencia de un hegemón que pueda garantizar la estabilidad del sistema internacional torna apremiante la necesidad de avanzar en reformas de los organismos multilaterales, a fin de incrementar su eficacia para contener la proliferación de conflictos bélicos.

c) *El lado oculto de la alianza China-Rusia: temores, desconfianza y rivalidad histórica*

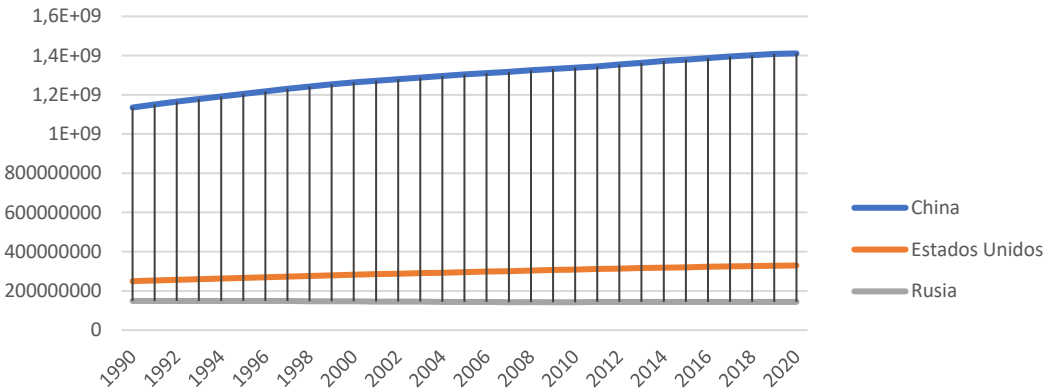
Si bien la alianza entre China y Rusia proviene de larga data y, parece sostenerse, aún frente a los cuestionamientos que emergieron por la incursión a Ucrania, lo cierto es que dicha relación no estuvo exenta de conflictos, en décadas pasadas.

Por un lado, cabe señalar la histórica ruptura que se produjo entre China y Rusia, luego de la desaparición de Stalin y el intento de Krushev de acercarse a los EE. UU. Por otro lado, es importante recordar el cambio en la óptica geopolítica que llevó adelante este último país, bajo la administración Richard Nixon, cuando buscó el acercamiento con la China de Mao. Como señalara Kissinger (2014), se trató de una estrategia clave de los EE. UU. para contener a los soviéticos en plena Guerra Fría, así como, para evitar la conformación del temido bloque chino-soviético. El autor sostuvo que, Nixon emprendió la táctica de transformar el mundo de dos potencias en un *triángulo estratégico*, con el propósito de evitar que China fuese sometida a la Doctrina Brezhnev y, terminara bajo la dominación soviética, tal como había acontecido con Checoslovaquia, en febrero de 1948. Además, señaló que "Nixon y sus consejeros consideraron que la independencia china era indispensable para el equilibrio mundial" (Kissinger, 2014: 716-7).

Para Kissinger, la táctica de Nixon constituyó el retorno de los EE. UU. al mundo de la *Realpolitik*, aunque más no fuese por un breve lapso, ya que, tras su renuncia, los presidentes subsiguientes retomaron la tradicional retórica idealista. No obstante, el acercamiento que consiguió Nixon con Mao derivó en el Comunicado de Shangai (1972) que durante todo el decenio sirvió de guía para las relaciones chino-estadounidenses, estableciendo -entre otras cuestiones fundamentales, que ambos países se opondrían a todo intento de cualquier país por dominar Asia. Esa alianza de facto que, se pergeñó entre los dos colosos, fue posible debido a que la postura de Mao era que "[…] la principal amenaza a la seguridad era la Unión Soviética" (Kissinger, 2014: 722).

Aunque el mundo cambió drásticamente desde el final de la Guerra Fría, los temores y desconfianzas entre estos países no se han desvanecido. En las publicaciones que sacó a la luz WikiLeaks de documentos diplomáticos confidenciales de los EE. UU., quedó en evidencia la inquietud y desconfianza que mantienen los rusos sobre el incesante crecimiento económico, demográfico (Gráfico N° 5) y tecnológico de China; además, sobre la posibilidad de que este último invada y/o colonice parte del territorio de Rusia, a través de la expansión de su población, sobre todo, en la región del Lejano Oriente Ruso, donde Rusia tiene escasa población.

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Fuente: Elaboración propia en base a datos del Banco Mundial, "Indicadores del desarrollo mundial". https://datos.bancomundial.org/indicador/NY.GDP.PCAP.PP.KD?locations=CN-US-RU (consultado el 15/02/2022).

Como argumentó Waltz (1979), la configuración de un sistema internacional tripolar tiende a ser inestable y, el curso de los acontecimientos podría conllevar a que el sistema derive en una bipolaridad o multipolaridad (si la UE y/u otros actores de peso lograren reconstruir su poder para equilibrar las fuerzas a nivel mundial). Sin embargo, la bipolaridad es un escenario viable, en el caso que los EE. UU. continúen presionando a China y/o Rusia. Aunque estos últimos comparten una alianza de larga data (OCS) y tienen afinidades político-ideológicas, considerando sus desconfianzas y rivalidades, más que la afinidad podría unirlos la amenaza del poder de los EE. UU. De modo que, la geopolítica del terror es lo que, nuevamente, parece estar movilizando las alianzas internacionales en el siglo veintiuno.

Finalmente, es importante recordar que, durante la Guerra Fría del siglo veinte el temor a una guerra total (nuclear) contuvo la posibilidad de una Tercera Guerra Mundial. Pero no hay garantías de que los líderes actuales continúen evidenciando ese nivel de responsabilidad. Como sostuvo Gilpin "[…] la política internacional puede ser caracterizada como lo era por Tucídides: la interacción de fuerzas impersonales y grandes líderes […el] líder puede guiar el barco del estado en una dirección o en otra" (Gilpin, 1981, citado por Palacio, 2019-a: 31). Cualquiera que sea esa dirección, tendrá impacto en el sistema político y económico internacional, ya que, como reconocen numerosos analistas, la geopolítica y la geoeconomía están profundamente intrincadas.

IV. Conclusiones

Aunque podrían establecerse diversos paralelismos entre el sistema internacional actual y períodos históricos en los que se evidenció el retorno de la geopolítica -en términos de rearme y bipolarización mundial, no es posible determinar cuál será el curso de los acontecimientos internacionales. No obstante, las constantes históricas nos permiten afirmar que el terror que genera la posibilidad de una guerra total, posiblemente, permita que la diplomacia continue siendo una de las principales herramientas de definición del curso de la política internacional, en el siglo veintiuno. Además, la sola tensión que significa la posibilidad de una Tercera Guerra implicará severas consecuencias para la economía y el comercio mundial, que ya fueron afectados por la crisis que generó la pandemia del Covid, en los inicios de la tercera década del dos mil. En ese marco hay que evaluar, también, el alcance de las consecuencias económicas que, inevitablemente, generarán las sanciones impuestas a Rusia, debido a la incursión en Ucrania.

Si bien la geoeconomía demostró que no se ha generado bienestar y beneficio para todos los participantes, no hay dudas de que la integración al mercado mundial continúa siendo una vía para favorecer el crecimiento económico, así como para luchar contra el flagelo de la inflación que, vino deteriorando la productividad de algunas economías en América Latina -como Venezuela y Argentina, pero que, a inicios de esta década, amenaza con generar un ciclo ascendente a nivel internacional -posiblemente, de estanflación. A la gran emisión que efectuaron los países para contrarrestar la crisis ocasionada por la pandemia, en 2020 y 2021, se podría añadir la caída del comercio mundial y el incremento en los precios de las materias primas que está impulsando la guerra Rusia-Ucrania.

Como señalara De Mateo y Sousa (1993: 978), en la segunda mitad del siglo pasado, el equilibrio del terror cedió paso a la integración de grandes espacios

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económicos, y la geopolítica, encaminada hacia la guerra, fue desplazada por la geoeconomía. Sin embargo, el siglo veintiuno no sólo atestiguó un resurgimiento de la geopolítica -en su aspecto más militarista, sino que evidenció que, contrariamente a lo que sostenían los defensores de la globalización, los cambios producidos en la geoeconomía han suscitado importantes conflictos entre los Estados[28], incrementando la incertidumbre sobre la futura estabilidad del sistema internacional.

Varios analistas señalaron que el cambio en la distribución de poder económico mundial -en favor de China, posiblemente, incidirá en la disputa por el liderazgo internacional. Ello también conllevó a que, en el propio corazón del capitalismo occidental, los EE. UU., el intervencionismo económico resurgiera con determinación, derivando en conflictos comerciales de magnitud significativa, principalmente, entre los EE. UU. y China. Aun así, la geoeconomía, entendida como la conformación de espacios económicos integrados a nivel internacional, seguirá existiendo y dependerá mucho de los grandes actores mundiales, como los EE. UU., China y Rusia[30]. *La geopolítica y la geoeconomía no sólo están intrincadas, sino que, en gran medida, la primera determina el curso de la segunda.*

Por último, los acontecimientos bélicos que tuvieron lugar entre la desaparición del orden bipolar y las primeras décadas del siglo veintiuno, incluyendo la incursión de Rusia en Ucrania, ponen en evidencia la anacronía y fragilidad del esquema institucional mundial que se organizó en la segunda posguerra que, pese a sus logros acotados, ha derivado más en una monstruosa burocracia sostenida por los Estados a nivel internacional que, en un sistema efectivo para garantizar la estabilidad y la paz mundial. Nuevamente, la ausencia de un hegemón que pueda garantizar la estabilidad del sistema internacional torna apremiante la necesidad de avanzar en reformas de los organismos multilaterales, a fin de incrementar su eficacia para contener la proliferación de conflictos bélicos.

La incursión rusa en Ucrania podría representar la sombra de una eventual guerra hegemónica, si los acontecimientos terminan precipitando una *bipolarización inflexible*, con el involucramiento directo de grandes poderes en dicho conflicto. En este sentido, es preciso recordar que, a diferencia de Waltz (1979) -quien consideraba que el sistema bipolar era el más estable, Gilpin (1981, citado por Palacio, 2019-a) señaló que *la bipolarización es el escenario más peligroso que puede asumir el orden mundial, porque crea un escenario de juego de suma cero*. Por ello, una nueva escalada del rearme militar -al estilo de una "Paz Armada", es otro factor que arroja incertidumbre sobre la estabilidad del actual sistema político y económico internacional.

El rol de China frente a estos desarrollos, nuevamente, aparece como trascendental para mantener el equilibrio internacional, no sólo por la importancia que reviste su economía a nivel mundial, sino por las dimensiones que podría conllevar la conformación de un bloque hostil chino-ruso. Como se mencionó anteriormente, la demostración de fuerza militar que está efectuando Rusia con su incursión en Ucrania, no sólo está destinada a Occidente, sino que puede ser una muestra para la propia China, país que cuenta con un poderío económico significativo, pero cuyo desarrollo armamentístico, en parte, todavía depende del aprovisionamiento de Rusia[31].

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[29] Y en el ámbito económico, social y político doméstico de numerosos países.

[30] Si bien este último país no es un actor destacado en la economía internacional, su rol como uno de los principales exportadores energéticos del mundo, inevitablemente, repercutirá en el desempeño de la economía internacional.

[31] Según Wezeman et al. (March 2020), Rusia es el segundo exportador más grande de armas en el mundo, después de los EE. UU., mientras que China representa el segundo cliente más importante de armas de Rusia, después de la India.

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Role of Financial Stability in Synchronising Real and Financial Cycle in CEMAC

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Abstract- The issue of synchronisation of economic cycle face the difficulty of framing factors that affect the different phases of the cycle. This paper aim to highlight the role plays by financial stability in the synchronisation of financial and real cycles. The analysis is carried out by, measuring the impact of financial stability on the synchronisation of the different components of real and financial cycles. Using panel VAR models, impulse response functions based on Monte Carlo simulations were exploited to measure these effects. Data from the BEAC and COBAC databases for all CEMAC countries has covered the period 2000Q1-2020Q4. The results obtained from empirical analyses confirm the fact that financial stability plays an important role by synchronising the various factors associated to each cycles, real cycle and the financial cycle. The analysis of the impulse response functions has showed that, the financial stability index has a positive impact on the synchronisation of the financial and real cycles in the long run term.

Keywords: financial stability, real and financial cycles, synchronisation, panel VAR, and monte carlo simulation.

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Role of Financial Stability in Synchronising Real and Financial Cycle in CEMAC

Rôle de la Stabilité Financière Dans la Synchronisation Des Cycles Financier et Réel Dans la CEMAC

Mbanga Pagal Emmanuelle Dorcas [α], Enguéne André Arnaud [σ] & Ndongo Eyinga René Basin [ρ]

Résumé- La problématique de la synchronisation des cycles économiques continue de faire face à la difficulté d'encadrer les facteurs qui affectent les différentes phases des cycles. L'objectif de cet article est de ressortir le rôle de la stabilité financière pour la synchronisation des cycles financiers et réels, ceci en mesurant l'impact que la stabilité financière exerce sur la synchronisation des différentes composantes de ces cycles réels et financiers. A l'aide d'une modélisation VAR en panel, nous exploitons les fonctions de réponses impulsionnelles basées sur les simulations de Monté Carlo pour mesurer cet impact. Les données proviennent des bases de données de la BEAC et de la COBAC et couvrent la période 2000Q1-2020Q4 pour l'ensemble des pays de la CEMAC. Les résultats obtenus des analyses empiriques permettent de confirmer le rôle joué par la stabilité financière dans la synchronisation des différents facteurs liés au cycle réel et les facteurs liés au cycle financier. Spécifiquement, l'analyse des fonctions de réponses impulsionnelles a fait ressortir un impact positif sur le long terme de l'indice de stabilité financière sur la synchronisation des cycles financiers et réels. Partant de ces résultats, la principale implication de politique a été celle d'encourager les autorités monétaires à davantage renforcer l'objectif de stabilité financière dans la CEMAC.

Motsclés: stabilite financiere, cycles reels et financiers, synchronisation, VAR en panel, et simulation de monte carlo.

Abstract- The issue of synchronisation of economic cycle face the difficulty of framing factors that affect the different phases of the cycle. This paper aim to highlight the role plays by financial stability in the synchronisation of financial and real cycles. The analysis is carried out by, measuring the impact of financial stability on the synchronisation of the different components of real and financial cycles. Using panel VAR models, impulse response functions based on Monte Carlo simulations were exploited to measure these effects. Data from the BEAC and COBAC databases for all CEMAC countries has covered the period 2000Q1-2020Q4. The results obtained from empirical analyses confirm the fact that financial stability plays an important role by synchronising the various factors associated to each cycles, real cycle and the financial cycle. The analysis of the impulse response functions has showed that, the financial stability index has a positive impact on the synchronisation of the financial and real cycles in the long run term. Based on these results, the main policy implication has been to encourage monetary authorities to strengthen the objective of financial stability in the CEMAC.

Keywords: financial stability, real and financial cycles, synchronisation, panel VAR, and monte carlo simulation.

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Introduction

L'analyse des cycles économiques continue d'être au cœur de la théorie économique depuis de nombreuses décennies[1]. La littérature économique qui s'est construite autour de ce sujet est partie de l'observation des faits (Cardona et al, 2001); celle-ci a présenté le cycle comme des fluctuations récurrentes où, les mouvements de hausse et de baisse se répètent sans que la périodicité soit complètement régulière (Zarnowitz, 1985).

Si le cycle financier a concerné le comportement relatif à l'évolution du crédit et du prix des actifs financiers (Avouvi-Dovi et al, 2006 ; Cardona et al, 2001), le cycle réel quant lui s'est surtout rapporté aux mouvements de hausse et de baisse observés au niveau de l'activité économique[2] globale des nations

[1] Selon Aimar, Bismans, Diebolt, (2010), c'est au début du XIXème siècle que l'étude des fluctuations de l'activité économique a débuté grâce aux travaux notoires de David Ricardo qui vécut la crise de 1815 consécutive à la guerre napoléonienne, lesquels travaux de Ricardo ont été accompagnés de ceux de Juglar (1862), qui s'est attardé à analyser le retour périodique des crises commerciales en France, en Angleterre et aux Etats-Unis.

[2] Pour Abramovitz (1956), le cycle réel n'impose aucune mesure unique de l'activité économique globale ; celui-ci fait surtout appel à divers instruments de mesure à savoir la production, l'emploi, les échanges extérieurs ainsi que le revenu. En clair l'auteur laisse entendre que plusieurs instruments de mesure peuvent être utilisés pour observer le cycle réel. Dans la même lancée, Zarnowitz (1985) souligne que les fluctuations de la production peuvent être observées à travers l'évolution du Produit National Brut, de même qu'à travers celle du Produit Intérieur Brut. Quant au cycle financier, si Borio (2012) n'a pas réfuté l'opérabilité des variables retenues par Cardona et al, (2001) ainsi que Avouvi-Dovi et al, (2006), Borio (2012) précise que le cycle financier fait surtout référence «aux interactions auto-entretenues qui peuvent coexister entre la perception de la valeur du risque et l'attitude face au risque, lesquelles ont des conséquences qui peuvent conduire à la prospérité ou à la dépression ». Il faut donc souligner que dans cette définition, le défi qui se rapporte à la gestion du risque concerne essentiellement ces variables financières sus-cités (crédit et/ou prix des actifs financiers).

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(Abramovitz, 1956). Pour Cardona et al, (2001) qui a semblé associer l'évolution du cycle financier au cycle réel, les co-mouvements entre ces différents cycles économiques sont les principaux facteurs qui déterminent les couplages et la synchronisation de ces cycles. Or, pour Borio et Lowe (2001), ainsi que Avouvi-Dovi et al, (2006), si le cycle financier ne peut se confondre au cycle réel, l'ampleur de l'influence que ces différents cycles (cycle financier et cycle réel) exercent les uns sur les autres suppose que, leur interdépendance doit être encadrée.

S'il est clair que ces auteurs font surgir la question de savoir quelle est l'ampleur de l'influence que ces différents cycles économiques peuvent avoir les uns sur les autres, leurs propos font également relever la nécessité d'encadrer l'influence des facteurs qui peuvent alimenter les effets pervers des fluctuations de ces différents cycles. Pour Gayer (2007), la synchronisation de ces différents cycles (cycles financier et cycle réel), et surtout dans le cadre d'une union monétaire, semble être un moyen approprié pour assurer un fonctionnement harmonieux des différents cycles, et utile pour toute stabilisation conjoncturelle de l'économie[3].

Seulement, l'absence de consensus sur les causes des couplages ou découplages entre ces cycles (Elachhab, 2010), et de conciliabule sur les déterminants de la synchronisation des cycles (Elachhab, 2010), soulève la persistance du problème se rapportant à la synchronisation des cycles. Face à cet état des choses où il semble difficile de proposer une approche unique permettant de synchroniser ces différents cycles économiques (financiers et réels), Rieu-de-Foucault (2018), loin de traiter directement de cette problématique, suppose que La stabilité du système financier est indispensable pour contenir les facteurs qui affectent les différentes phases du cycle financier. Dès lors, ce commentaire laisse sous-entendre que la nécessité de stabiliser le système financier peut être mise en première loge comme l'un des moyen d'encadrement des facteurs d'aggravation des cycles financiers et d'absorption des effets néfastes en cas de période défavorable.

Cela suppose qu'elle est susceptible de préserver les résultats du secteur réel. Plutôt que de se limiter à identifier la structure des cycles, précisant si ceux-ci sont synchrones ou asynchrones, l'urgence d'encadrement des facteurs d'aggravation des cycles, mais surtout, celle de l'absorption des effets néfastes en cas de période défavorable (ceci afin de prémunir les différents secteurs réel et financier de tout choc) semble se poser. Cependant, il se trouve que, la question du comment manager la synchronisation de ces différents cycles économiques semble condenser ces préoccupations. Ces orientations ressortent comment compléter utilement le rôle stabilisateur de la politique monétaire, condition nécessaire, mais non suffisante, d'un bon déroulement des cycles financiers et réels.

Cet article pose donc la question de savoir si la stabilité financière telle que construite dans la CEMAC permet d'améliorer la synchronisation des cycles réel (évolution de l'activité économique) et financier (évolution du crédit). L'objectif principal de cet article est de montrer que la stabilité financière améliore la synchronisation des cycles réel et financier dans la CEMAC. La réflexion va donc s'articuler autour de trois principaux points. D'abord, une revue de la littérature qui constitue le socle de cette analyse. Par la suite, l'approche méthodologique nécessaire à la vérification empirique de nos hypothèses. Enfin, la discussion des résultats obtenus va permettre de proposer les recommandations de politique économique.

I. Revue Sélective de L'état de L'art

La revue de la littérature est structurée sur une triple approche. Nous discuterons d'abord des notions de la synchronisation des cycles financier et réel. Ensuite nous montrerons que cette notion est différemment appréciée dans la littérature. Enfin, nous ferons une synthèse empirique non exhaustive de l'impact de la stabilité financière sur la synchronisation des cycles financier et réel.

a) La synchronisation des cycles économiques: une notion discutée

Lorsqu'on étudie le degré d'homogénéité d'un groupe de pays, il est traditionnel de comparer la synchronisation de leurs cycles d'activité. Cela permet de voir si ces pays sont appelés à former une union monétaire. Si l'on peut étendre cette comparaison aux cycles définis par d'autres variables, en particulier les variables financières, monétaires et réelles, cela exige d'étudier l'évolution des différentes variables sur le temps. Par contre la plupart du temps, il s'agit d'examiner la synchronisation, ou le co-mouvement des variables. En outre, s'il existe une analyse traditionnelle de la synchronisation entre cycle économique (cycle d'activité et cycle de crédit), le constat d'une détérioration progressive de cette synchronisation est également marqué. Deux principales théories sœur ont développé cette partie de la théorie économique.

[3] En réalité, la notion de synchronisation des cycles est principalement une question empirique (Chen et al, 2009) ; celle-ci fait davantage référence au fonctionnement harmonieux et commun qui favorisent des co-mouvements cycliques (Chen et al, 2009 ; Elachhab, 2010). Si la prise en compte des facteurs qui favorisent le couplage/découplage de ces mouvements cycliques importe (Elachhab, 2010), il faut souligner que la notion « synchronisation des cycles » tire son origine des travaux de Mundell (1961) qui assimile la synchronisation des cycles à une similitude des phases du cycle d'activités (cycle réel) dans les Etats membres d'une union monétaire facilitant le recours à une politique monétaire commune garante de la stabilisation conjoncturelle.

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i. *La synchronisation des cycles selon la théorie classique*

Dans l'approche classique, le cycle est défini à l'aide du niveau d'une variable. Il se caractérise comme une succession de phases d'expansion et de récession. Pour parvenir à synchroniser des cycles, il essentiel de définir et d'identifier de façon précise les points de retournement ainsi identifiés (Harding et Pagan, 2004). Une phase de récession (et/ou d'expansion) est définie comme le temps séparant un pic d'un creux.

Cette vision du cycle remis à l'ordre du jour grâce aux travaux de Harding et Pagan (2004) propose une méthode simple de retrouver deux séries dans la même phase récession (ou expansion) du cycle.

Selon la théorie économique classique, s'il existe un cycle financier relatif à l'évolution du crédit, ainsi qu'à celle du prix des actifs financiers (Scheubel et al. 2019), ce cycle peut être lié mais ne se confond pas avec le cycle réel de l'activité économique. À la question de Comment définir le cycle financier ? De façon générale, ce cycle financier est assimilé aux écarts substantiels et durables enregistrés par des variables financières (prix d'actifs financiers et niveau des crédits distribués) au tour de leur tendance d'équilibre de long terme (Scheubel et al. 2019).

Il existe ainsi une cyclicité financière normale qui reflète les relations naturelles entre les phases du cycle réel et les variables financières. Ces différents cycles économiques ont tendance à s'atténuer ou à s'allonger (Harding et Pagan, 2004).

ii. *La contribution de la nouvelle économie classique*

Pour la nouvelle économie classique (NEC), les cycles réels s'expliquent par des chocs exogènes qui viennent affecter l'économie. Ces chocs peuvent être de deux types: monétaires et réels. Dans ces deux cas, il s'agit de cycles à l'équilibre au sens où ces cycles reflètent les mouvements des variables macroéconomiques résultant d'un comportement d'optimisation des agents, et sont compatibles avec l'hypothèse d'ajustement des marchés. La théorie des cycles réels suppose que le choc affectant l'économie a une origine réelle (et non monétaire).

Les théoriciens des cycles réels partent de l'hypothèse selon laquelle le taux de progrès technique connait d'importantes fluctuations aléatoires. Ces dernières impliquent des changements dans les prix relatifs, lesquels incitent les agents rationnels à modifier leur comportement en termes d'offre de travail et de consommation (Blanchard et al, 2015).

Le cycle apparaît alors comme une réponse optimale du système économique aux variations de la technique de production. L'objectif de cette théorie est de montrer que les fluctuations économiques sont la réponse optimale des agents à des chocs d'origine réelle. Si l'on note l'accentuation d'une relative asymétrie dans les cycles de crédit, les retournements à la baisse de l'activité et du crédit sont généralement anticipés, alors que la reprise du cycle de crédit apparait postérieure à celle de l'activité. Le cycle de crédit est alors plus marqué que celui de l'activité (Grjebine et Tripier, 2016). De tels mécanismes reflètent le rôle croissant des facteurs financiers, en particulier ceux associés au canal large du crédit dans la propagation des cycles d'activité.

b) Synchronisation des cycles économiques : une notion différemment appréciée

La littérature retient plusieurs facteurs favorisant la transmission d'un mouvement cyclique d'un pays à un autre. Ainsi, trois principaux canaux de transmission selon Ramzi (2013) caractérisent la synchronisation des cycles réel et financier. Il s'agit du canal commercial (qui est un indicateur expliquant les échanges bilatéraux); le canal commun (traduit par le prix du pétrole) et enfin le canal financier (approximé par le taux d'intérêt réel).

i. *Canal commercial et la Synchronisation des cycles économiques*

S'agissant du canal commercial, la théorie économique montre que le commerce est le mécanisme le plus important de la transmission des fluctuations entre les économies (Frankel et Rose, 1996). L'expansion de la demande agrégée dans une économie peut être transmise par une augmentation de la demande des biens et services ainsi que de la demande de travail d'autres pays, ce qui va entrainer une augmentation de la production.

En d'autres termes, un choc positif de la demande dans une économie provoque une croissance au niveau de l'activité réelle de l'autre économie par le biais de la liaison commerciale. Cette transmission de fluctuations entre les économies se fait à travers le mécanisme de l'échange (Frankel et Rose, 1996). Le facteur commercial devient en cela un déterminant principal du co-mouvement des cycles économiques entre les pays. Des travaux empiriques se sont focalisés sur l'étude de l'effet de l'intégration commerciale sur la synchronisation des cycles économiques. Frankel et Rose (1996) ont aperçu qu'une haute intégration commerciale entre les économies accroit la synchronisation des cycles économiques. Toutefois, Calderon et al. (2002) détecte une faible corrélation. Pour Shin et Wang (2003), qui n'exclue pas l'éventualité du rôle du canal commercial, les auteurs précisent tout de même que l'augmentation du commerce ne traduit pas automatiquement une forte synchronisation des cycles financiers et réels.

ii. *Les facteurs communs et la synchronisation des cycles économiques*

S'agissant du facteur commun, Frankel et Rose (1996) note que la variation des cours du pétrole est un facteur important d'interdépendance des économies. Si le prix du pétrole est considéré comme un indicateur

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traduisant le facteur commun, un choc pétrolier peut alors agir directement sur les fluctuations des économies et peuvent être transmises à l'échelle mondiale en raison notamment de l'interdépendance des économies. Pour Ross et Russel (1996) ce facteur commun peut ne pas être un choc pétrolier mais plutôt un choc de politique monétaire qui agirait directement sur les fluctuations des économies. Ross et Russel (1996) explique qu'un choix de politique monétaire européenne peut se répercuter à l'échelle mondiale en raison notamment de l'interdépendance des économies. Les auteurs montrent que le changement des politiques monétaires des grandes économies peut influer sur l'économie domestique des pays de petites tailles comme celles de la CEMAC. Il faut donc croire que Canova et De Nicolo (1995) en montrant que la prévision de la croissance du Produit National Brut américain (pays de référence) permet de prévoir les rendements des marchés financiers européens et le PIB de certains pays, viennent confirmer l'argument de Ross et Russel (1996). Les chocs des prix du pétrole restent certes cette source importante des fluctuations économiques comme Duarte et Holden (2003) rappellent que le choc pétrolier des années 70 a entrainé une forte synchronisation internationale au cours de la décennie suivante. Toutefois, Canova et De Nicolo (1995) ainsi que Ross et Russel (1996) invitent à ne pas négliger les autres facteurs communs

iii. *Les facteurs financiers et la Synchronisation des cycles économiques*

Ross et Russel (1996) en évoquant la capacité d'un choc de politique monétaire à affecter la synchronisation des cycles économique a permis de constater que les facteurs peuvent eux aussi faciliter la synchronisation des cycles. S'agissant de ces facteurs financiers, Otto et al. (2001) proposent une synthèse des travaux où ils montrent que les liens dans les marchés financiers s'avèrent être les mécanismes de synchronisation les plus répandus dans la littérature appliquée des cycles réel et financier. Les auteurs notent que la politique monétaire commune et les comportements des cycles économiques sont une indication d'une structure économique commune. De même, Frankle et Rose (1998) montrent qu'une forte corrélation d'output entre les économies européennes est la conséquence de la politique économique commune. Ainsi, un autre facteur qui explique les corrélations entre les cycles économiques est l'intégration des marchés financiers domestiques et des Marchés financiers étrangers qui sont les facteurs financiers Otto et al. (2001) notent que la transmission des chocs financiers s'effectue à travers les dettes et les marchés des actions. Ceci est davantage observé dans le cas d'une ouverture du compte capital. Dans le cas où ce compte n'est pas ouvert, ce canal reste à priori non optimal. Sous l'hypothèse de la mobilité des capitaux, Otto et al. (2001) estiment que toute décision d'épargne ou d'investissement dans une économie influence le prix et le marché financier de l'autre économie. Le rôle des facteurs financiers dans les fluctuations cycliques de l'activité s'est accru. Il existe traditionnellement une synchronisation entre cycle d'activité et cycle de crédit. La très forte progression du crédit lors des phases ascendantes du cycle ainsi que son retournement brutal lors des phases de contraction, peut alimenter et amplifier les fluctuations de l'activité économique (Jordà et al, 2016).

iv. *Rôle de la stabilité financière dans synchronisation des cycles financier et réel: synthèse empirique*

Très peu d'études se sont appesanties sur l'analyse de l'impact de la stabilité financière sur la synchronisation des cycles financier et réel. Mais, les preuves empiriques des effets de la stabilité financière sur la synchronisation des cycles sont complexes et non consensuels. La stabilité financière peut stimuler (Oman, 2019), entraver (Richter et al. 2019), ou être sans effet sur la synchronisation des cycles financier et réel (Skare et Porada-Roncho, 2019).

L'absence de consensus s'explique par la taille de l'échantillon, l'approche méthodologique, et la composante de la stabilité financière retenue dans les différentes études. Sur le plan empirique, il est difficile d'établir une causalité entre le cycle financier et le cycle réel car les chocs exogènes au système financier déstabilisent le système financier lui-même.

Oman (2019), sur une étude portant sur la zone euro, entre 1980-2018, par le biais d'un modèle dynamique SVAR, trouve que la stabilité du système financier permet de faciliter la coordination entre les différents cycles des deux principaux secteurs (financier et réel). En conséquence, la stabilité qui permet de contenir les effets des facteurs internes et externes doit tenir compte de l'état spécifique dans lequel le système financier évolue. Cette stabilité va donc devenir un filet de sécurité à même d'encadrer les effets de débordements des cycles des différentes sphères.

La stabilité du système financier permet de mieux stimuler la synchronisation des cycles financier et réel au niveau de la zone euro. Dans une autre étude sur la zone euro, Scheubel et al. (2019) évaluent le degré de la synchronisation de cycles économiques entre les différents Etats membres. Il en ressort de cette étude les Informations selon lesquelles, les renversements des cycles économiques au sein de chacun des pays étudiés sont identifiés à partir des séries temporelles macroéconomiques multi variées ; l'auteur utilise à la fois les procédures de datation paramétriques et non-paramétriques.

Le degré de synchronisation des cycles illustrés a pu être caractérisé à travers l'utilisation des distances entre les cycles sur l'ensemble de l'échantillon et sur les deux sous-échantillons. L'un des principaux résultats est

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que la stabilité financière a un effet avéré sur la synchronisation des cycles financier et réel. En effet, les variations des performances économiques observées dans la zone euro dépendent en grande partie du niveau de stabilité financière. En outre, Schinasi (2009) montre que la stabilité du système financier fait généralement allusion au bon fonctionnement microéconomique et macroéconomique de l'organisation financière. Ainsi, les enjeux que cette stabilité représente pour la performance de l'économie réelle sont autant importants que ce qu'elle représente pour la synchronisation des cycles car celle-ci contribue d'une part, à allouer les ressources de façon efficiente, et d'autre part, à évaluer et à gérer les risques financiers, mais également à absorber les chocs (Schinasi, 2009). La stabilité financière doit se situer au cœur même des interactions entre les différents secteurs, car celle-ci va plus rapidement faciliter la synchronisation des cycles. Si les économies contemporaines sont caractérisées par la tendance de long terme, ceci en fonction de la structure économique du pays, les cycles économiques notamment le cycle réel relatif à l'évolution de l'activité économique et le cycle financier relatif à l'évolution du crédit et/ou du prix des actifs vont toujours recouvrir des successions plus ou moins régulières des phases d'expansions et de récessions (Aglietta et Brand, 2016). Pour ces derniers, la stabilité financière a un impact positif sur la synchronisation des cycles financier et réel.

Dans une étude concernant la CEMAC, Bikai et Mbohou Mama (2018) analysent le lien entre la stabilité bancaire et la stabilité macroéconomique dans la CEMAC. Une double analyse est faite à ce niveau. D'une part, ils construisent un indice composite de stabilité bancaire qui leur permet de montrer une relative stabilité, malgré les zones de fluctuations observées au cours de la période de l'étude. D'autre part, les auteurs utilisent une modélisation VAR structurelle qui leur permet d'aboutir à trois principaux résultats: la vulnérabilité du secteur bancaire aux chocs du cours du pétrole; les déséquilibres macroéconomiques affectent la stabilité du système bancaire et les chocs idiosyncratiques sont capables d'induire une instabilité du système bancaire. D'autres études arrivent à trouver un effet inverse de la stabilité financière sur la synchronisation des cycles. En effet, Richter et al. (2019) sur un modèle stochastique montre que le cycle financier est généralement à l'origine de l'absence de stabilité financière. Cette situation constitue de fait un coût pour la stabilité financière et par ricochet, un problème au niveau de la synchronisation entre cycle financier et cycle réel.

On peut néanmoins constater que la différence de résultat est principalement due à l'approche méthodologique utilisée. Malgré cette différence, même si aucune réponse ne semble correcte face à cette préoccupation, la stabilité financière en est une issue. Celle-ci doit se situer au cœur même des options de synchronisation et des interactions entre les différents acteurs et même les différents secteurs. Dans cette optique, Creel et al. (2015) montrent qu'au niveau d'une union monétaire, l'objectif de stabilité semble offrir plus rapidement une opportunité de synchronisation des cycles puisque les liens financiers issus généralement des effets de contagion sont susceptibles d'entrainer des co-mouvements significatifs de fluctuations macroéconomiques. De l'état des lieux non-exhaustif, de la littérature traitant de l'impact de la stabilité financière sur la synchronisation des cycles financier et réel, trois principaux enseignements se dégagent. D'abord, les travaux existant considèrent une seule orientation de la synchronisation des cycles économiques. Les cycles économiques ont tendance à s'atténuer ou à s'allonger au cours des dernières années. Le rôle des facteurs financiers dans les fluctuations cycliques de l'activité économique s'est en même temps accru. Ensuite, la stabilité financière influence la synchronisation des cycles financier et réel de façon directe, et même indirecte (Skare et Porado-Ronchon, 2019). Autrement dit, la problématique portant sur l'opérabilité de la stabilité financière à synchroniser les cycles financier et réel tente d'être renouvelé dans le cadre de cette étude. De plus, cette littérature occulte l'importance des indices désagrégés de la stabilité financière. Une telle approche est celle que nous tentons d'aborder dans la suite de notre travail de recherche à partir de notre approche empirique.

II. Méthodologie et Données

La littérature économétrique offre une large gamme de méthodes appliquées utiles au traitement de la synchronisation des cycles. Par exemple, Scheubel et al. (2019) utilise un modèle structurel DGSE, au moment où Oman (2019) a adopté une modélisation multivariée par le modèle PVAR pour spécifier les variables à introduire dans l'explication de la synchronisation des cycles financiers et réels. Dans cette partie, nous retenons la seconde approche dans le cadre de cette étude. Nous présentons d'abord le modèle empirique, ensuite la technique d'estimation, enfin les données.

a) Le modèle empirique

Dans cette section, nous procédons à l'évaluation empirique du rôle que la stabilité financière joue dans la synchronisation des cycles réel et financier dans la CEMAC. Cette simulation permettra de mesurer l'impact que la stabilité financière a sur la synchronisation entre le niveau de l'activité réel et l'évolution du crédit des pays membres de la CEMAC. Pour y parvenir, nous allons, à la suite des travaux d'Oman (2019), nous appuyé sur un modèle PVAR avec k-variables d'ordre p. Ce modèle présente un panel spécifique à effets fixes représentés par le système d'équations linéaires suivant: (1)

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$$Y_{\cdot it} = Y_{\cdot it-1}\,A_1 + Y_{\cdot it-2}\,A_2 + \cdots + Y_{\cdot it-p+1}\,A_{\cdot P-1} + Y_{\cdot it-p}\,A_{\cdot p} + X_{\cdot it}\,B_{\cdot} + \mu_{it} + \xi_{it}$$
$$i \in \{1, 2, \ldots, N\}, t \in \{1, 2, \ldots, \quad T_i\} \tag{1}$$

Où $Y_{\cdot it}$ est un vecteur (1*k) de variables dépendantes ; $X_{\cdot it}$ est un vecteur (1*l) de variables exogènes ; μ_{it} *et* ξ_{it} sont respectivement les vecteurs (1*k) des variables dépendantes des effets fixes et spécifiques et des erreurs idiosyncratiques. La matrice (k*k) $A_{\cdot 1}$, $A_{\cdot 2}$,…, $A_{\cdot p}$ et la matrice (l*k) B. sont des paramètres à estimer.

Love et Abrigo (2016) estiment que les innovations ont les caractéristiques suivantes:

$$E[\xi_{it}] = 0, E[\xi'_{it}\xi_{it}] = \sum \quad \text{. et } E[\xi'_{it}\xi_{it}] = 0 \text{ pour tout } t > s.$$

De façon spécifique, le modèle PVAR de l'équation (1) ci-dessus peut se réécrire sous une forme structurelle permettant d'analyser les effets des chocs sur les variables endogènes. Il se présente comme suit:

$$ISSF_{it} = \alpha_{10} + \alpha_{11}ISSF_{it-1} + \alpha_{12}TPIB_{it-1} + \alpha_{13}CP_{it-1} + \alpha_{14}DP_PIB_{it-1} + \alpha_{15}CE_{1t-1} + \mu_{1i} + \vartheta_{1t} + \xi_{1it} \tag{2}$$

$$TPIB_{it} = \alpha_{10} + \alpha_{11}ISSF_{it-1} + \alpha_{12}TPIB_{it-1} + \alpha_{13}CP_{it-1} + \alpha_{14}DP_PIB_{it-1} + \alpha_{15}CE_{1t-1} + \mu_{1i} + \vartheta_{1t} + \xi_{1it} \tag{3}$$

$$CP_{it} = \alpha_{10} + \alpha_{11}ISSF_{it-1} + \alpha_{12}TPIB_{it-1} + \alpha_{13}CP_{it-1} + \alpha_{14}DP_PIB_{it-1} + \alpha_{15}CE_{1t-1} + \mu_{1i} + \vartheta_{1t} + \xi_{1it} \tag{4}$$

$$DP_PIB_{it} = \alpha_{10} + \alpha_{11}ISSF_{it-1} + \alpha_{12}TPIB_{it-1} + \alpha_{13}CP_{it-1} + \alpha_{14}DP_PIB_{it-1} + \alpha_{15}CE_{1t-1} + \mu_{1i} + \vartheta_{1t} + \xi_{1it} \tag{5}$$

$$CE_{it} = \alpha_{10} + \alpha_{11}ISSF_{it-1} + \alpha_{12}TPIB_{it-1} + \alpha_{13}CP_{it-1} + \alpha_{14}DP_PIB_{it-1} + \alpha_{15}CE_{1t-1} + \mu_{1i} + \vartheta_{1t} + \xi_{1it} \tag{6}$$

Où: ISSF représente l'indice synthétique de stabilité financière; TPIB, CP, DP_PIB et CE représentent respectivement: taux de croissance du PIB, le cours du pétrole, le déficit public sur PIB et provisions sur créances douteuses; i = 1…6 (nombre de pays); t représente l'horizon temporel (premier trimestre 2000 au quatrième trimestre 2020). Avec μ_{ji}, ϑ_{jt} *et* ξ_{jit} représentent respectivement les effets spécifiques pays, temps et l'erreur idiosyncratique.

b) La technique d'estimation

Plusieurs estimateurs basés sur la méthode GMM ont été proposés pour calculer les estimations des équations ci-dessus, en particulier lorsque T est fixe et N grand[4]. Si nous supposons que les erreurs ne sont pas corrélées, l'estimation de ces équations à partir de sa transformation en différence première peut être faite en instrumentant Les variables en différence et en niveau des périodes précédentes (Anderson et Hsiao, 1982). Mais cet estimateur pose un problème, car la transformation de l'équation en différence première augmente l'écart dans un panel non équilibré (Abrigo et Love, 2015).

Si certains $Y_{\cdot it-1}$ ne sont pas disponibles, l'équation en différence première de la période t et t_{-1} aura des données manquantes. Les périodes de temps nécessaires pour chaque panel sont plus élevées avec l'ordre de retard d'un PVAR. Pour un PVAR de second ordre, les instruments en niveau nécessitent que l'on observe $T_i > 5$ pour chaque panel (Abrigo et Love, 2015).

Arellano et Bover (1995) proposent une déviation orthogonale comme une alternative à la transformation de l'équation en différence première. Au lieu d'utiliser les écarts par rapport aux observations passées, ils soustraient la moyenne de toutes les observations futures disponibles, en minimisant ainsi la perte de données. Potentiellement, seules les observations récentes ne sont pas utilisées au cours de l'estimation, car les observations passées ne sont pas inclues dans cette transformation, celles-ci restent des instruments valides. Par exemple, dans un PVAR de second ordre; seules les observations avec un $T_i > 4$ sont nécessaires pour avoir des instruments valides en niveau. De plus, la littérature empirique montre qu'il existe deux principales méthodes d'analyse des résultats issus de l'estimation d'un modèle PVAR.

La première méthode fait référence à l'analyse des fonctions de réponses impulsionnelles. Pour déterminer les réponses du système aux impulsions structurelles, nous déterminons les multiplicateurs dynamiques structurels. Toutefois, n'ayant pas une variable sur la stabilité financière, nous allons construire un indice synthétique de stabilité financière, en se basant sur les travaux de Minvielle (2003). La formule utilisée suivant en cela Cloutier et Robinson (2015) pour construire cette variable d'indice synthétique stabilité

[4] D'autres méthodes incluent la correction du biais analytique des modèles de variables muettes par les moindres carrés (Bun et Carree, 2013). D'autres auteurs corrigent ce biais par des méthodes Bootstap (Everaert et Pozzi, 2007). Pour un aperçu exhaustif des modèles PVAR, voir l'article de Canova et Ciccarelli (2013).

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financière (ISSF) elle est très proche de l'indice de stress test financier de Minvielle (2003).

Pour une année *i*, celle-ci sera donnée par l'expression suivante:

$$ISSF_i = \frac{\sum_{t=1}^{p} \lambda_t * I_{i,t}}{\sum_{t=1}^{p} \lambda_t} \quad (7)$$

Où les λ_t sont les valeurs propres obtenues des axes retenus de l'ACP, $I_{i,t}$ l'indicateur synthétique pour chaque axe choisi et *p* le nombre d'axes retenus pour l'ACP. Pour obtenir l'indicateur synthétique de stress test financier, deux ACP sont réalisées, l'une dite exploratoire et l'autre dite confirmatoire. Les variables utilisées dans le cadre de cette étude peuvent être subdivisées en quatre catégories. D'abord, nous avons pour les variables de la catégorie 1, on retrouve les variables du secteur réel. Les variables de cette catégorie permettent de capter les effets que les activités de l'économie réelle ont sur le système financier. Il s'agit : taux de croissance du PIB (TPIB), du déficit public sur PIB (DP_PIB), cours du pétrole (CP), le taux d'inflation (INFLATION). Ensuite, pour les variables de la catégorie 2, on recourt aux variables liées à la solidité du secteur bancaire.

Il s'agit: Des créances à l'Etat sur PIB (CAE_PIB), du rapport du crédit à l'Etat sur crédit bancaire à l'économie (CSECB), du rapport du crédit au secteur privé non financier sur PIB (CSPNF_PIB), Crédit à l'économie (CE), du rapport des avoirs extérieurs nets sur PIB (AEN_PIB) et du taux d'intérêt des appels d'offre (TIAO). De plus, nous avons la catégorie 3 qui regroupe les variables qui captent la qualité du crédit. Il s'agit principalement des provisions sur créances douteuses (PRO_CD), des créances en souffrance sur crédit brut (CSCB) et du ratio crédit sur dépôt (RCSD). Enfin, les variables de la catégorie 4 représentent les variables de solidité du secteur financier. Il s'agit : du ratio de couverture (CAR), du rendement des actifs (ROA), du rendement des capitaux propre (ROE), du ratio de liquidité (RL) et du niveau de crédits en souffrance sur le total actif (CS_TA).

c) Les données

L'étude couvre les pays de la CEMAC (le Cameroun, le Congo, le Gabon, la Guinée Equatoriale, la RCA et le Tchad). Les informations qui suivent s'attèlent à préciser la source des données et le traitement de celles-ci. Toutefois, s'il convient de repréciser ici que l'étude est menée sur des données trimestrielles allant du premier trimestre 2000 au quatrième trimestre 2020, les données proviennent pour la plupart de la base de données de la Banque des Etats de l'Afrique Centrale (BEAC).

La dépendance de ces pays à la variabilité du cours du pétrole expose la principale raison qui explique la présence du cours du pétrole parmi ces variables; celle-ci provient de la base de données de la BEAC. Les données concernant le système bancaire de la CEMAC proviennent de la Commission Bancaire de l'Afrique Centrale (COBAC). S'agissant du traitement des données, la principale information qui doit être relevée se rapporte à la trimestrialisation de la variable PIB par la méthode de Chow-Lin avec comme variable d'étalonnage les crédits intérieurs.

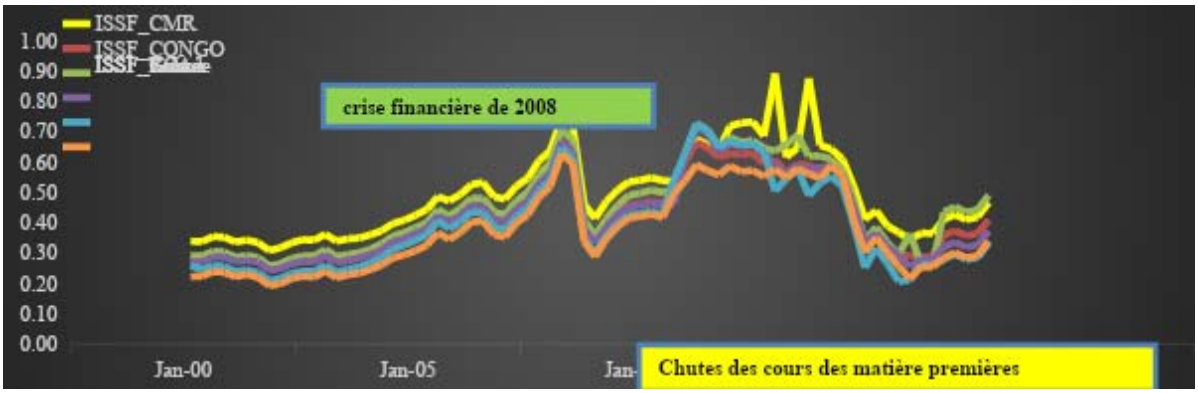
III. Présentation des Résultats

L'estimation du modèle économétrique et l'interprétation des résultats succèdent à l'analyse statistique des évolutions croisées de l'indice de stabilité financière.

a) Analyse de l'indice de stabilité financière

Les graphiques ci-dessous représentent l'évolution de l'indice synthétique de la stabilité financière pour chacun des pays de la CEMAC sur la période 2000-2020. La lecture se fait en considérant les pics et les creux respectivement comme la hausse et la baisse de l'indice de stabilité du système financier (ISSF) dans l'espace considéré. La hausse de l'ISSF s'effectue aux alentours des évènements historiques bien connus (août 2007 premier « credit crunch; septembre 2008 la faillite de la Lehman Brothers » ; juin 2014 chute des cours des matières première notamment Les cours du pétrole principale source de devises dans la CEMAC).

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Source: Construit par les auteurs à partir des bases de données de la BEAC et de la COBAC sous Stata 16.

Figure 1: Indice synthétique de stabilité financière (ISSF)

De plus, on note que le cycle réel est composé de deux phases: une phase de récession, au cours de laquelle l'activité économique tend à s'affaiblir, et une phase d'expansion, au cours de laquelle l'activité économique tend à se renforcer. Le pic désigne la fin d'une période d'expansion et le creux la fin d'une période de récession (cf. annexe 1 de datation des cycles réels et financiers). Le cycle financier quant lui évolue généralement sur des courbes longues: les périodes d'accroissement caractérisées par une augmentation de l'ISSF[5] (de l'essor au paroxysme en passant par l'euphorie) et les périodes de diminution, caractérisées par une baisse de l'indice de stabilité du système financier (du paroxysme à la déflation de la dette en passant par le reflux). La lecture se fait en considérant les pics et les creux respectivement comme la hausse et la baisse l'ISSF dans la CEMAC.

La superposition des graphiques des cycles réels et des cycles financiers (annexe 2 rend aisé la datation de l'ISSF) permet de constater globalement que les périodes d'augmentation ISSF correspondent aux périodes de récession de l'activité économique. Un dysfonctionnement observé dans le système financier est susceptible d'entrainer une dégradation au niveau de l'environnement macroéconomique; celui-ci ne peut être contenu que par le niveau de stabilité du système financier. Le Cameroun au cours de la période 2001 à 2009 offre un cas pratique; celui-ci correspond à une période au cours de laquelle la variabilité du cours du pétrole tendait à renforcer l'activité économique. Au même moment, comme l'indique la figure 1, l'ISSF est en hausse. La figure 2 qui ressort la Superposition des cycles réels et des cycles financiers contenue en annexe montre qu'à ce point, le PIB s'est également trouvé en hausse, la hausse de l'ISSF informe sur le rôle stabilisateur de cet instrument. Si ce résultat soulève également le rôle positif d'une structure économique diversifiée comme c'est le cas du Cameroun, le rôle de la stabilité financière est surtout conforté au cours de cette période malgré le cours anormalement élevés des matières premières notamment le pétrole (le Brent).

b) Analyse et interprétation des résultats

Les résultats issus de l'analyse des corrélations exhibent déjà une corrélation positive entre l'indice synthétique de stabilité financière et le taux de croissance réelle du PIB. La stabilité financière aurait donc une influence positive sur le taux de croissance du PIB. De même, bien qu'elle soit faible, la corrélation positive et significative entre l'indice de stabilité financière et le niveau des crédits à l'économie montre que cette stabilité influe sur le volume du crédit.

Tableau 1: Corrélation entre les variables

	TPIB	CE	CP	DP_PIB	ISSF
TPIB	1,000				
CE	0,8480	1,000			
CP	0,0432	0,0490	1,000		
DP_PIB	0,290	0,0339	0,2413	1,000	
ISSF	*0,0037*	0,0043	-0,0138	-0,0060	1,000

Source: Calcul de l'auteur sous stata 16.

Par ailleurs, la corrélation positive entre crédit à l'économie et taux de croissance du PIB laisse croire qu'un faible niveau de crédit à l'économie entraine une baisse du niveau de création des richesses dans la CEMAC. Ces résultats statistiques permettent déjà de croire qu'un niveau de stabilité financière améliorerait la synchronisation des cycles économiques (financiers (crédits à l'économie) et réels (taux de croissance du PIB)). Les séries étant la plupart du temps non

[5] Danninger, Elekdag, et Tytell (2009): un épisode de stress financier est défini comme une période où le système financier est sous pression et sa capacité de servir d'intermédiation est altérée

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stationnaires, Nyanda (2021) estime que des tests de stationnarité sont inévitables car elles permettent de contrôler sir les variables admettent une moyenne et une variance qui croissent sans limite avec le temps. Si les variables sont cointégrées, cela suppose qu'elles acceptent la spécification dynamique de type « mécanisme à Correction d'Erreur (MCE)[6] ». Toutefois, si les variables ne sont pas stationnaires, la cointégration rationalise la modélisation à court et à long termes et ainsi de suite.

Pour les données de panel, où une technique Autoregressive est retenue, le test Levin-Lin-Chu (LLC) et d'Im Pesaran et Shin (2003) sont approprié pour contrôler et étudier l'ordre d'intégration des variables. Le tableau 2 propose une synthèse de ces tests. Le test du choix de retard optimal, en suivant la méthodologie préconisée par Ferstl (2017) reporté en annexe a permis de choisir le plus petit MBIC comme choix du retard optimal. Le tableau 3 en annexe relève que le retard optimal est 1 dans le cadre de cette étude.

Tableau 2: Tests de stationnarité

Variables	LLC	IPS
ISSF	0,000	0,000
CP	0,000	0,000
DP_PIB	0,000	0,000
TPIB	0,000	0,000
CE	0,000	0,000

Source: Auteurs, calculé sous Stata 16.

L'estimation de l'équation de Panel VAR par la méthode GMM permet d'avoir une réponse qui a permis de situer ce travail. Les résultats des estimations contenues dans le tableau 3 ci-dessous révèlent qu'un niveau de stabilité du système financier est susceptible d'améliorer la synchronisation des cycles économiques dans la CEMAC. Le commentaire repose sur la mesure de l'impact que la stabilité financière a sur les facteurs liés au cycle réel (taux de croissance du PIB) et les facteurs liés au cycle financier (crédit à l'économie). Les résultats contenus dans le tableau 3 ci-dessus font constater que, l'indice synthétique de stabilité financière (ISSF) exerce un effet négatif et significatif au seuil de 10% sur l'évolution du cours du pétrole. En fait, il permet de contrer les effets pervers de la variabilité du cours du pétrole.

Tableau 3: Résultats de l'estimation du modèle PVAR en GMM

	Variables	Equations				
		Equation 2	Equation 3	Equation 4	Equation 5	Equation 6
		ISSF	TPIB	CP	DP_PIB	CE
L1	*ISSF*	-4,32 (45,01)**	***4,74*** (45,98)**	**-0,993** (40,77)**	-289,16 (51,11)**	***8,24*** (39,37)**
L1	*TPIB*	***-0,001*** (16,89)**	***0,021*** (18,52)**	0,000 (26,51)**	0,94 (46,36)**	***0,001*** (3,55)**
L1	*CP*	-0,20 (50,76)**	-1032,75 (41,49)**	-0,003 (27,04)**	-5,79 (33,34)**	-0,198 (53,29)**
L1	*DP_PIB*	-0,044 (11,19)**	-8,33 (0,021)**	0,899 (31,91)**	1315,45 (395,2)**	0,623 (73,0)**
L1	*CE*	***-0,001*** (8,29)**	***-0,008*** (7,60)**	-0,000 (28,23)**	-0,45 (23,32)**	***-0,000*** (7,14)**

*Source: Auteurs, calculé sous stata 16. *p<0,05 **P<0,01*

Cet indice de stabilité financière a un effet négatif et significatif sur le déficit public. Pour ce qui est des variables liées au cycle financier et au cycle réel, on remarque que premièrement: i) l'indice de stabilité financière a un effet négatif et significatif au seuil de 10% sur le taux de croissance du PIB (sur l'évolution de l'activité économique); ii) l'indice de stabilité financière a un effet négatif et significatif sur le niveau des crédits à l'économie. Au vue de ces résultats, la stabilité financière semble être une option pour parvenir à la synchronisation des cycles économiques des pays de la sous-région CEMAC notamment parce que cet indice impacte à la fois l'évolution de l'activité économique aussi bien au niveau réel qu'au niveau financier.

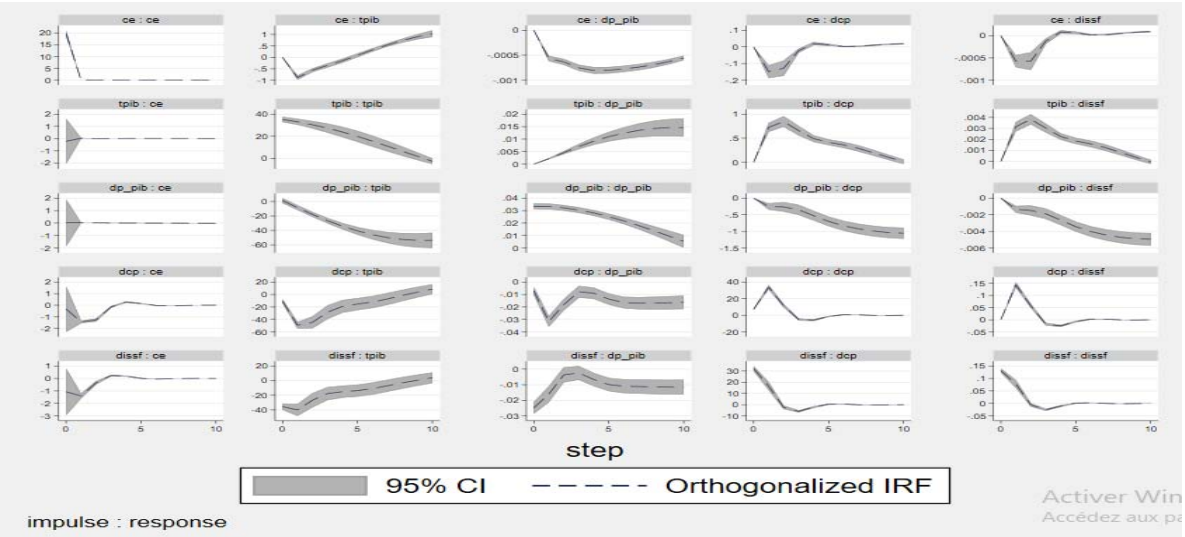
c) Analyse de la robustesse des résultats

Le test de stabilité du modèle (1) montre qu'en termes de robustesse, conformément aux résultats du

[6] Selon Nyanda (2021), l'estimation du MCE permet dans ce cas de réconcilier dans un même cadre, les comportements de court et long termes qui se manifestent sur des horizons temporels a priori antinomiques.

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tableau 2 en annexe et la figure 1 ci-dessous, toutes les variables sont contenues à l'intérieur du cercle unitaire. Autrement dit, de l'équation 2 jusqu'à l'équation 6, celles-ci sont globalement stables. De même, une causalité au sens de Granger entre ces différentes variables a pu être détectée (annexe tableau 4). L'analyse de la dynamique de la stabilité financière sur la synchronisation des cycles financier et réel est observée à partir de l'analyse des fonctions de réponses impulsionnelles basées sur les simulations de Monté Carlo pour 1000 itérations. En effet, s'agissant de l'impact de la stabilité financière sur la synchronisation des cycles liés notamment à l'évolution du crédit à l'économie et à l'évolution du taux de croissance du produit intérieur brut la figure ci-dessous ressort clairement l'impact de la stabilité du système financier.



Source: Auteurs, calculé sous stata 16.

Figure 2: Analyse des fonctions de réponses impulsionnelles

La figure 2 ci-dessus permet de constater que:

i). Une dynamique positive entre l'évolution du crédit à l'économie et l'indice de stabilité financière dans la CEMAC. A long terme, la stabilité financière améliore le niveau du crédit à l'économie. De plus, la stabilité financière a tendance à renforcer le niveau stabilisation du cycle financier et donc assure une meilleure synchronisation du cycle financier dans la CEMAC.

ii). Une dynamique positive et bien marquée entre l'évolution de l'activité économique et l'indice de stabilité financière dans la CEMAC. A court terme, on note un impact négatif, mais qui s'améliore sur le long terme.

En outre, l'analyse de l'effet dynamique de la stabilité financière sur le cours du pétrole nous montre que la stabilité financière permet également de stabiliser les fluctuations du cours du pétrole sur le marché. En effet, au cours des dernières années, les différents épisodes d'instabilité financière ont permis d'observer une évolution erratique des cours du pétrole sur le marché mondial, ce qui a contraint les économies de la CEMAC très fortement dépendant du pétrole dans la définition de leur politique économique.

L'effet dynamique décroit à court terme avant de se stabiliser sur le long terme. Ainsi dit, la stabilité financière permet de maitriser les fluctuations du cours du pétrole dans la CEMAC. Ces résultats confortent l'idée de la forte dépendance de toutes les composantes (réels et financiers) des économies de la CEMAC à l'orientation des cours de pétrole, principal produit d'exportation des économies de la CEMAC. Cela explique notamment la raison pour laquelle la Communauté Economique et Monétaire de l'Afrique Centrale a connu une instabilité financière à la suite de la chute des cours mondiaux du pétrole, ce qui a conduit à une aggravation de la dette des pays de la CEMAC. En somme, le constat est clair et celui-ci atteste que la stabilité financière joue un rôle important dans la dynamique de synchronisation des cycles économiques dans la CEMAC précisément des cycles réels et financiers dans la CEMAC au cours de la période de l'étude.

IV. Conclusion

Cet article s'est fixé comme objectif de montrer le rôle de la stabilité financière dans la dynamique de synchronisation des cycles réel et financier dans la CEMAC. Suivant la théorie économique étayée par l'observation des faits, il existe un cycle financier et un cycle réel dans la CEMAC fortement influencé par l'évolution du niveau de la stabilité financière. Pour parvenir à ce résultat, nous avons étudié théoriquement et empiriquement une problématique jusqu'alors

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insuffisamment explorée dans la littérature notamment dans le contexte des économies en développement. L'option de vérifier l'hypothèse selon laquelle la stabilité financière améliore la synchronisation des cycles réels (taux de croissance du PIB réel, déficit public, cours du pétrole) et financiers (provisions pour créances douteuses), une méthodologie duale a été retenue. La première a porté sur la construction et l'observation de la datation de l'indice synthétique par rapport aux cycles réel et financier. La seconde a porté sur une modélisation par le biais d'un modèle PVAR en GMM qui nous a permis d'analyser les fonctions de réponses impulsionnelles basées sur les simulations de Monté Carlo pour 1000 itérations.

Cette étude a conduit à deux principaux résultats : la stabilité financière a un effet significatif sur le taux de croissance du PIB, sur le déficit public et sur le cours du pétrole dans la CEMAC d'une part, et d'autre part, la stabilité financière a un effet positif et significatif sur le niveau des créances douteuses des établissements de crédit de la CEMAC. Partant de ces résultats, nous suggérons un renforcement de l'objectif de stabilité financière dans les économies de la CEMAC.

En revanche, cette décision ne révèle pas comment limiter les dommages causés à l'activité économique, ni comment garantir un équilibre entre sphère réelle et sphère financière. Le cas spécifique des économies de la CEMAC fait relever que, ces économies sont dépendantes de l'environnement extérieur, principale cause d'instabilité. Par conséquent, les autorités monétaires et financières sont concernées à plusieurs égards par ce phénomène qui a des répercussions potentielles sur la situation macroéconomique des pays membres de cette sous-région. La capacité à garantir une synchronisation du cycle réel et du cycle financier par la stabilité financière peut assurer que le canal financier dans la CEMAC est un déterminant important de synchronisation entre les pays membres de cette sous-région. Cette stabilisation joue un rôle plus important mais surtout doit occuper une place importante dans les stratégies de politiques plus que le canal commercial (se rapportant aux échanges) ou encore le canal commun (rapporté au cours du pétrole). De plus, le canal financier approximé par le taux d'intérêt dans la littérature peut être assisté de l'objectif de stabilité financière. Si cette stabilité financière est nécessaire à cause du rôle favorable qu'il assure pour le bon déroulement de la synchronisation des cycles réel et financier, il est nécessaire de maintenir un environnement macroéconomique et financier sain en permanence dans les pays de la CEMAC. Cette orientation permet en fait de compléter l'idée suffisamment soutenue dans la littérature portant sur le rôle de la stabilité financière retenue aujourd'hui comme outil de la politique monétaire.

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Annexes

Annexe 1: Identification des caractéristiques et datation des cycles réels et des cycles financiers

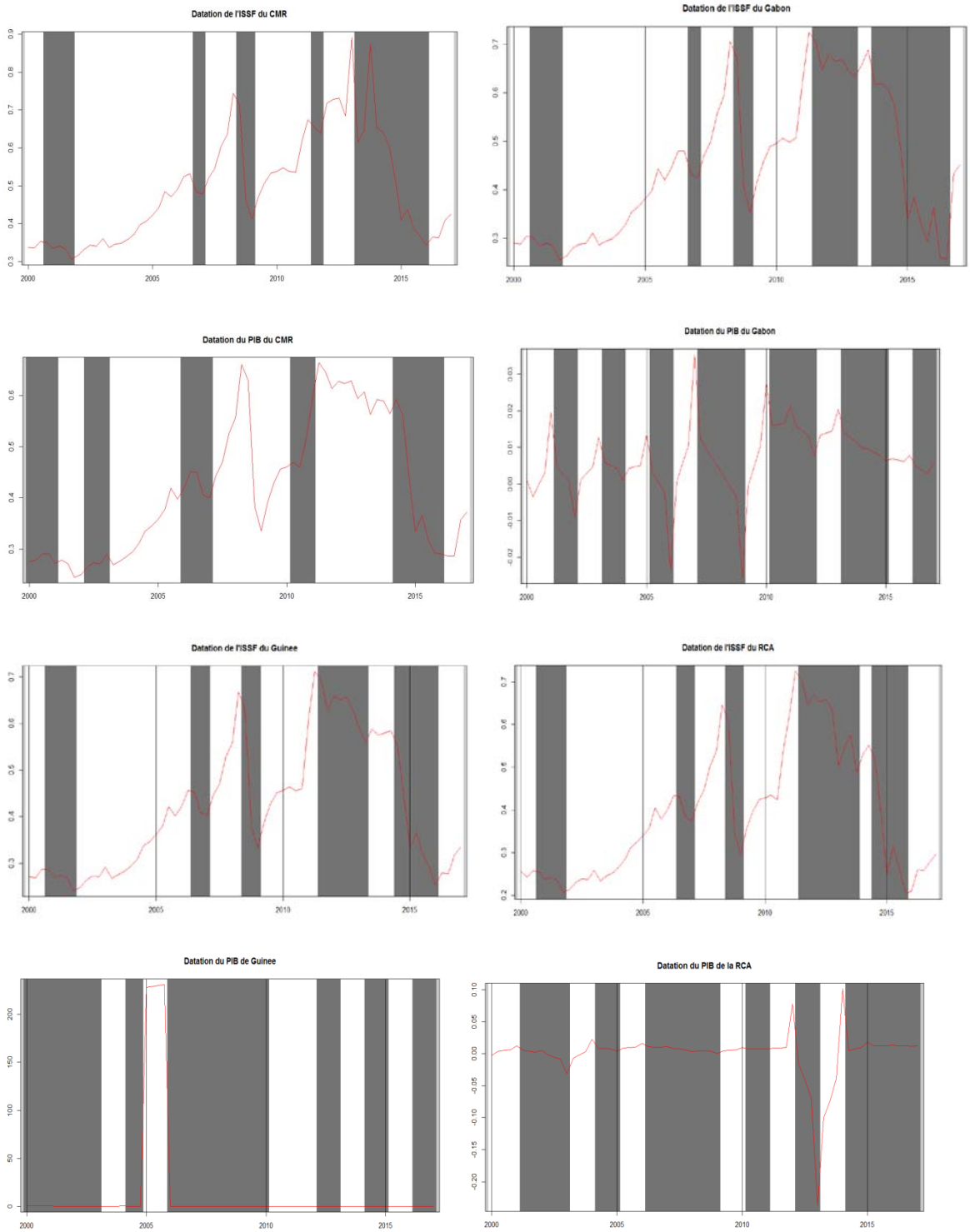
Cycle Financier							Cycle Réel						
	période de baisse des facteurs du cycle financier			période de hausse des facteurs du cycle financier				période de récession			période d'expansion		
Pays	période et durée	amp	durée	période et durée	amp	durée	Pays	période et durée	amp	durée	période et durée	amp	durée
CMR	2006Q3-2007Q1	0,1	2	2001Q4-2006Q3	0,2	19	CMR	2003Q1-2004Q1	0	4	2002Q1-2003Q1	0,1	4
	2008Q2-2009Q1	0,3	3	2007Q1-2008Q2	0,3	5		2005Q1-2007Q1	0	8	2004Q1-2005Q1	0,3	5
	2013Q1-2016Q1	0,5	12	2009Q1-2011Q2	0,3	9		2008Q1-2009Q1	0	4	2007Q1-2008Q1	0	4
				2011Q4-2013Q1	0,3	5		2010Q1-2012Q1	0,1	8	2009Q1-2010Q1	0	4
CNG	2006Q2-2007Q1	0,1	3	2001Q4-2006Q2	0,2	18		2013Q1-2014Q1	0	4	2012Q1-2013Q1	0	4
	2012Q3-2013Q2	0,3	3	2007Q1-2008Q2	0,3	5					2014Q1-2016Q1	0	8
	2008Q2-2009Q1	0,3	3	2009Q1-2011Q2	0,3	9	CNG	2002Q1-2003Q1	0	4	2001Q1-2002Q1	0	4
	2014Q2-2016Q3	0,3	9					2005Q4-2007Q1	231	5	2004Q1-2005Q5	231	11
GBN	2006Q3-2007Q1	0,1	2	2001Q4-2006Q3	0,2	19		2010Q1-2011Q1	0	4	2007Q1-2010Q1	0,1	12
	2008Q2-2009Q1	0,4	3	2007Q1-2008Q2	0,3	5		2014Q1-2016Q1	0	8	2011Q1-2014Q1	0	12
	2011Q2-2013Q1	0,1	7	2009Q1-2011Q2	0,4	9	GBN	2001Q1-2002Q1	0	4	2002Q1-2003Q1	0	4
	2013Q3-2016Q3	0,4	12	2009Q1-2011Q2	0,4	9		2003Q1-2004Q1	0	4	2004Q1-2005Q1	0	4
				2013Q1-2013Q3	0,1	2		2005Q1-2006Q1	0	4	2006Q1-2007Q1	0,1	4
GNE	2006Q2-2007Q1	0,1	3	2001Q4-2006Q2	0,2	18		2007Q1-2009Q1	0,1	8	2009Q1-2010Q1	0,1	4
	2008Q2-2009Q1	0,3	3	2007Q1-2008Q2	0,3	5		2010Q1-2012Q1	0	8	2012Q1-2013Q1	0	4
	2011Q2-2013Q2	0,2	8	2009Q1-2011Q2	0,4	9		2013Q1-2015Q1	0	8	2015Q1-2016Q1	0	4
	2014Q2-2016Q1	0,3	7				GNE	2004Q1-2004Q4	0,1	3	2003Q1-2004Q1	0,1	4
RCA	2000Q3-2001Q4	0,1	5	2001Q4-2006Q2	0,2	18		2005Q4-2010Q1	231	17	2004Q4-2005Q4	231	4
	2006Q2-2007Q1	0,1	3	2007Q1-2008Q2	0,3	5		2012Q1-2013Q1	0,1	4	2010Q1-2012Q1	0,1	8
	2008Q2-2009Q1	0,3	3	2009Q1-2011Q2	0,4	9		2014Q1-2015Q1	0,1	4	2013Q1-2014Q1	0,1	4
	2011Q2-2013Q4	0,2	10	2013Q4-2014Q2	0,1	2					2015Q1-2016Q1	0	4
TCD	2014Q2-2015Q4	0,3	4	2001Q4-2006Q3	0,2	19	RCA	2001Q1-2003Q1	0	8	2003Q1-2004Q1	0,1	4
	2000Q3-2001Q4	0	5	2007Q1-2008Q2	0,3	5		2004Q1-2005Q1	0	4	2005Q1-2006Q1	0	4
	2006Q3-2007Q1	0,1	2	2009Q1-2011Q2	0,3	9		2006Q1-2009Q1	0	12	2009Q1-2010Q1	0	4
	2008Q2-2009Q1	0,3	3					2010Q1-2011Q1	0	4	2011Q1-2012Q1	0,1	4
	2011Q2-2016Q1	0,4	19					2012Q1-2013Q1	0,3	4	2013Q1-2014Q1	0,3	4
							TCD	2001Q1-2002Q1	0	4	2002Q1-2004Q1	0,1	8
								2004Q1-2006Q1	0,2	8	2006Q1-2007Q1	0,1	4
								2007Q1-2008Q1	0,1	4	2008Q1-2010Q1	0,1	8

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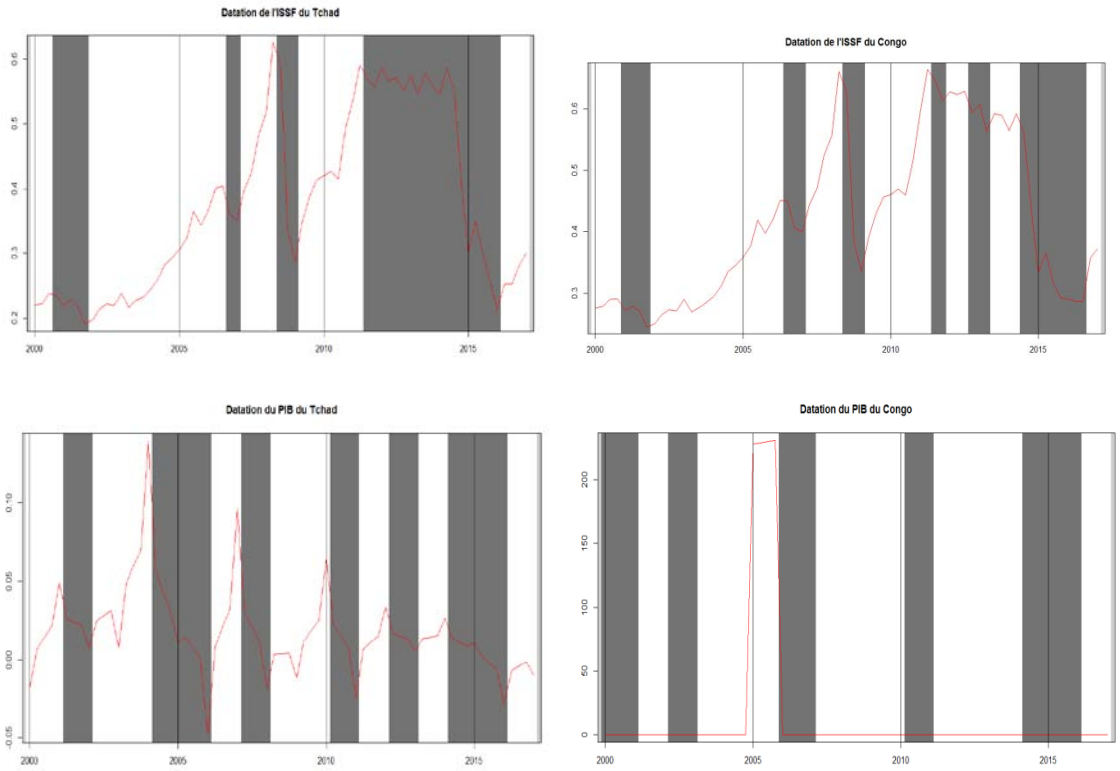
		2010Q1-2011Q1	0,1	4	2011Q1-2012Q1	0,1	4
		2012Q1-2013Q1	0	4	2013Q1-2014Q1	0	4
		2014Q1-2016Q1	0,1	8			

Source: Calcul des auteurs, sous Stata 16

Annexe 2: Superposition des cycles réels et des cycles financiers



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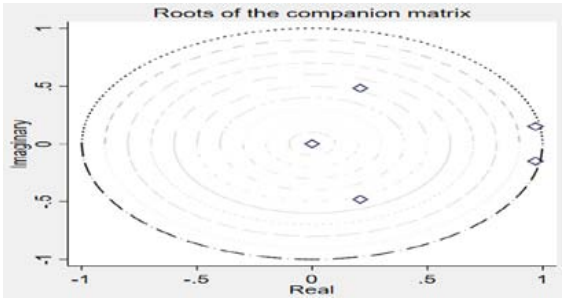


Source : Auteurs sous Stata 16

Observation

The graphs should be presented in this order (ISSF above and the GDP below for each country). This shows how in periods of increased financial pressure deteriorating periods of economic activity are followed and vice versa

Annexe 3: Test graphique de stabilité du modèle



Source: Calcul des auteurs, sous stata 16.

Annexe 4: Compléments des analyses statistiques et des estimations économétriques

Tableaux 1: Statistiques Descriptives

Variables	Observations	Moyenne	Ecart –type	Minimum	Maximum
TCPIB	504	4,260	30,975	-0,237	231
CE	504	1,021	19,563	0	406,666
CP	504	64,349	31,245	193,41	122,390
DP_PIB	504	0,247	0,866	-0,196	0,441
ISSF	504	0,241	0,143	0,190	0,891

Source: Calcul des auteurs, sous stata 16.

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Tableau 2: Test de stabilité du modèle PVAR

Valeurs propres		Modules
Réelles	Imaginaires	
0,96	-0,15	0,98
0,96	0,15	0,98
0,20	-0,48	0,52
0,000	0,48	0,52
-0,000	0	0,000

Source: Calcul des auteurs, sous stata 16.

Tableau 3: Choix du retard optimal

Retard	CD	J	J PVALUE	MBIC	MAIC	MQIC
1	-4,63	297,74	0,0002	-880,68	-116,25	-419,094
2	0,57	162,75	0,205	-602,86	-93,24	-295,14
3	0,98	76,21	0,140	-306,59	-51,78	-152,73

Source: Calcul des auteurs, sous stata 16.

Tableau 4: Test de causalité de Granger

Variable		Chi2	df	prob>Chi2
ISSF	ALL	2814,52	4	0,000
COURS_PETROLE		1652,19	4	0,000
DP_PIB		2481,84	4	0,000
TPIB		15507,03	4	0,000
PRO_CD		3874,35	4	0,000

Source: Calcul des auteurs, sous stata 16.

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Economic Empowerment Model of Coastal Communities

By Rukin
Universitas Teknologi Surabaya

Abstract- The research was conducted to determine the level of economic empowerment of coastal communities.

By using qualitative methods, it has been found that the economic level of coastal villages is still low.

This is because the community has not been able to take advantage of business opportunities from coastal natural resources. The unsuitable lifestyle of the people also triggers the low level of their economy.

The government does not provide them with entrepreneurship education.

To overcome this problem, the role of the government is expected to empower the economic level. One solution that can be taken is improving public policies related to the economic development model of coastal village communities. In addition, an understanding of business is needed to find opportunities that exist.

Keywords: *development economy, empowerment, coastal communities.*

GJHSS-E Classification: *DDC Code: 363.85610971 LCC Code: TX360.C3*



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I. Introduction

The coastal communities are proof that reflects the reality of imbalance in development compared to the land area. Socio-economic policies related to coastal communities need to be reorganized and directed for coastal communities' welfare while still preserving the resources so that socio-economic activities of coastal communities can be accelerated and sustainable.

Seeing the phenomenon that most of coastal communities work as fishermen, farmers and other unskilled laborers are still live in poverty. From these conditions researchers believe, to release them from the poverty and improve economy level, there should be held a sustainable economic empowerment program.

Nevertheless, the empowerment of coastal communities is inseparable from their generic local wisdom. Therefore, in order to empower the coastal communities, the socio-cultural order of society must be the basic element. Development and empowerment of these communities will not be accepted well by them if it never considering to the socio-cultural aspects of local communities.

Welfare essentially is the responsibility of the government, but in reality until now the government has not been able to spread evenly the community's welfare.

The economic matters and prosperity of the nation is the responsibility of the government. It has been explained that the prosperity of the people is most preferred not the prosperity of a person. Therefore, the economy is organized as a joint effort based on familial principles. Meanwhile, the economy is built on economic democracy for the prosperity of all.

II. Problem Statement

Based on the phenomenon above, it is necessary to conduct deeper study on: What is the model of economic empowerment of coastal communities in poverty alleviation?

III. Literature Review

Economic and poverty are two links that are always connected. The low level of the economy of a society leads to high levels of poverty. Therefore, it takes hard work continuously to solve it. The collaboration should be carried out by the government, the public and if possible including private sector and it's expected to be synergized together.

However, poverty problem is not easily to be solved, because poverty is a multidimensional problem that covers various aspects of life, not only covering the economic side, but also the social and cultural side.

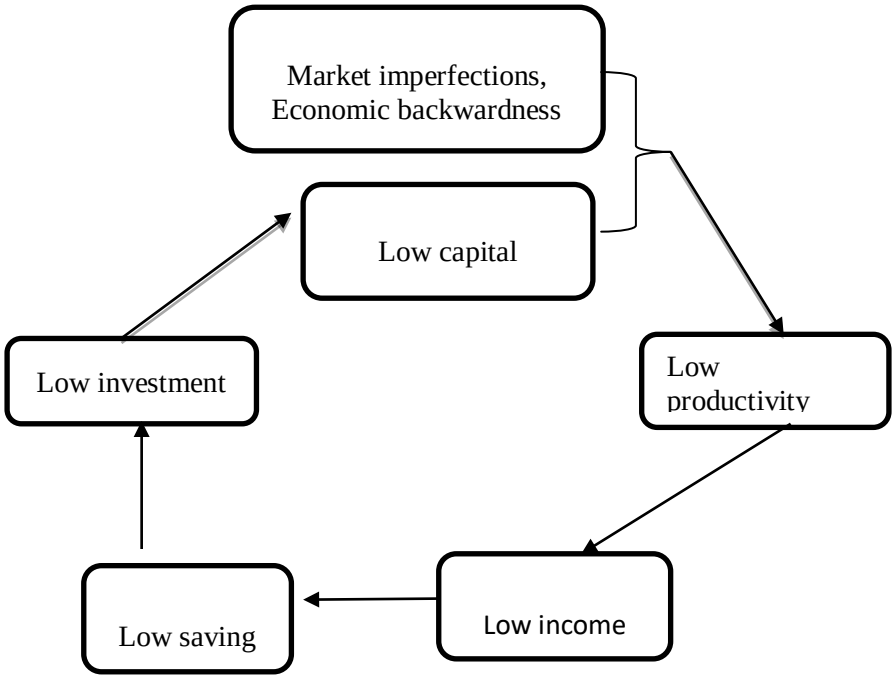
The number of poor people in rural area is caused by the lack of supporting infrastructure, as well as the limited access of transportation, health and education facilities and infrastructure for the people. Geographical conditions greatly affect their economic level.

IV. Poverty

Poverty can be interpreted as a situation where there is an inability to meet basic needs such as food, clothing, shelter, and drinking water. It is closely related to the life quality. Chambers (1998) poverty is an integrated concept that has five dimensions, namely: proper, Powerless, state of emergency, dependence and isolation both geographically and sociological.

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Pigure 1: Vicious Circle of Poverty

a) Poverty of Fishermen Communities

When clearly considered, in fact there are many factors that cause poverty of fishermen communities, in addition to internal factors there are also exist an external factors. According Kusnadi (2003), factors causing the poverty of fishermen divide in two groups: internal poverty and external poverty.

Meanwhile, Kusnadi (2003) also explained that internal poverty of fishermen include: (1) the limitations of human resource quality of fishermen; (2) the limited capacity of venture capital and fishing technology; (3) working relationships in fishing organizations that are often less profitable for workers; (4) difficulty in diversifying fishing business (5) high dependence on occupation go to sea; and (6) lifestyles that are considered wasteful, less oriented to the future.

b) Economic empowerment of Coastal communities on poverty alleviation

To reduce poverty in Indonesia, it is important to know what factors affect the high low level of poverty so that in the future can be formulated an effective public policy to reduce poverty level. In addition, the existence of strategy and alternative policies that take side to the poor become an absolute necessity to overcome poverty.

In addition strategies and alternative policies to overcome the poverty of rural people including coastal communities can be done by providing broad opportunities for people to obtain education services and adequate health services. It also need to strengthen the executive and legislative commitments to improve governmental order and encourages regional development agendas prioritizing poverty eradication as main priority. Pro-poor policies and programs need to be focused on the real economy sector and should adopt the paradigm that stands for the poor.

V. Research Methodology

To obtain accurate data, this study uses a qualitative method with a phenomenological approach. The phenomenological approach is a qualitative research tradition rooted in philosophy and psychology and focuses on the experience of human life (sociology). An important point that becomes the strength of the study of phenomenology is that the experiences hidden in the philosophical and psychological aspects of individuals will be revealed clearly. This agrees with Rukin, 2019 that critically phenomenology can be interpreted broadly as a philosophical movement that generally gives an implicit emancipatory influence to social research methods. Denzin, et. al., 2009 explained that the research strategy is only a tool, while the responsibility of the researcher is to understand the various models available and the desired goals in this study. The resource persons/ informants were selected using a purposive method. According to Rukin, 2021 purposive is a technique for determining informants not based on regions or strata, but based on considerations that focus on certain goals in this study. Thus, it can be interpreted that this purposive method, the selected informants are considered to understand the research to be carried out. Meanwhile, to get accurate results, in-depth interviews with knowledgeable people who understand about the

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problem being studied are conducted. In addition to using interviews, data mining also uses observation and literature study.

This data processing and analysis is used to draw data and information obtained from the field into a theory. Mc Nabb, 2002 states that there are two approaches in processing and analyzing research data, namely Staurissian and Glaserian. This data processing and analysis is used to draw data and information obtained from the field into a theory. Mc Nabb (2002) states that there are two approaches in processing and analyzing research data, namely Staurissian and Glaserian. However, in general, in terms of fundamentals, both approaches emphasize the same thing, namely emphasizing the importance of coding as the key to analysis. This analysis process is carried out continuously starting from the beginning of data collection until the adequacy of data is met. Therefore, in this study, it is very possible for researchers to retrieve data repeatedly from informants when needed. On the other hand, researchers must also formulate the truth of events/events with in-depth interviews or interviews. Smith, 2009 explains that the data obtained by in-depth interviews can be analyzed by using interpretative phenomenological analysis.

VI. Results and Discussion

From depth interviews result, found various problems that make the low economic level of coastal communities. These problems include lack of education of coastal communities. In addition, health insurance is also not comprehensive. While infrastructure facilities and village infrastructure is rudimental.

From the various problems that exist result lacking of community creativeness. Thus, the community is less able to take the business opportunities that exist. While potential of coastal areas are very abundant.

Synergistically and systematically poverty alleviation must be done so that all citizens are able to enjoy the results of development and dignified life. Therefore, the synergy of all stakeholders as well as the participation of the community is necessary.

The strategy is run with various poverty reduction programs. Activities undertaken by the government, businesses, and communities are to improve welfare of the poor through social assistance, community empowerment, empowerment of micro and small economic enterprises, and other programs in order to improve economic activity.

However, in the implementation of the program, it seems the government has not included public participation so all programs that are tackled by the government is on target and as desired. Therefore, in the future, the government should involve community participation. Beside the program can be run on target, with community participation is expected to be a control in the implementation of the program.

It also found the low income levels of society and the amount of spending make coastal communities increasingly chained in poverty. Odd Jobs with low salary sometimes create a problem for them.

Experience the problem, coastal communities finally tried to build another business. Such as fish and shrimp farming with tarpaulin as media or make fish and shrimp crackers and all of it is done with limited capital. In addition there is also a small part of the community who opened the small shop and food stalls with very little capital. All that effort is done to meet their personal needs and their family's needs.

Some other communities rely solely on the results of fish catching at sea and along Kepetingan River. However, the results also declined. The high spending of fuel used for fishing is not proportional to the results obtained

From this phenomenon the community must innovate with other businesses in order to meet the needs of his family life. To meet this need, some people make a semi-permanent fish pond made from tarpaulins in the front yard of their house. The pools are for raising catfish and shrimp in the hope that the harvest can be used to support their economy.

Meanwhile, from the field observation, the community has not been able to open new business opportunities from sea and fish ponds both for fish and shrimp except only to make crackers that are still less optimal. This is all due to their lack of knowledge and lack of coaching from the government.

Coaching program is necessary to improve their economy, whether the program is held by the government or by private sector that share same desire to improve the economy of coastal community. Apparently the role of government in entrepreneurship development to coastal villagers is still lacking. This happens because of geographical factors, it's difficult to reach.

From the various problems above it seems clear that the government is still lacking in empowering the community, mainly to the efforts in order to get optimal results in improving their economy. Meanwhile, the government is lack in providing insight to the community about home-based business marketing conducted by coastal communities.

Furthermore, the mistake of government system is by simply providing assistance without providing solutions how to use it. Because it became a community habit when they get help, then their lifestyle will increase. Their purchasing power will rise for a moment without thinking of the future. This is a weakness for people in this coastal area.

From the field observations result that their low education level also affect the level of the economy.

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Since long time coastal communities mostly just worked as traditional fishermen and ponds farmers, always assume that education has not become an important requirement.

Beside of things mentioned above, many of coastal communities work as fishermen. However, the wrong habits are sometimes done by the fishermen. When going to fishing at sea sometimes they borrowing money from the fish collectors. Hopefully the catch can be sold to the collectors and reduce their loans.

However, if the fishermen get lot fish then they will go home with the remaining money from the catch. However, if the fish catches only slightly and decline, it is certain opportunity to close the loan becomes less, thus their debt to the collectors will be more and more. Therefore they certainly will be more entangled by the debts to these fish collectors.

The same thing is done by the pond farm farmers. When they start working on the ponds, spreading the seeds of the fish feeding them until the harvesting process, sometimes they also use the loan money. When the results are good enough then they will get maximum results. However, on the contrary it is certain that they will experience a lot of losses.

This problem is less thought by community. Seeing this phenomenon should be increase the effort to coaching or lending capital for them to start a business with a very flexible repayment system. If this can happen then surely they will not be in a debt winding.

Meanwhile their wives have no skills. After the field observation, their inability because of low education level, least experience and lack of entrepreneurship empowerment from the government. Whereas the manufacture of food from these processed products can be sold out of the village or even out of the area.

But in reality people have not been able to grasp this opportunity, while the outcome of it can be used to sustain their economy. This matter really needs serious attention. Nor the absences of awareness from the communities or it just because of their laziness alone so opportunities are never caught by them.

It is necessary to held entrepreneur coaching from government or private parties to be their companion including up to the marketing process. And if it possible provides capital aid to start a business with an easier payment system. If this happens then it is believed their economic level will increase.

These responsibilities must all be managed in groups, not individually. Due to the number of occurrences in some areas that many of the community's loan money sourced from government funds are not returned. To avoid it, it is better to make loan in groups and the person who take responsibility is the head of the group. It is more possible to make the condition becomes more secure with one financial responsibility. Because of the habits that occur in the field that if the loan is on behalf of the individual then the possibility of returning the loan is very difficult.

In addition to the various problems above, there are other things that are less neglected in this community that is the existence of goat farms that lack of coaching from the government. While the owners of this goat farm just follow the tradition of heredity that is to let the animals cattle out the cage in the morning and go home on the day. They just rely solely on eating grass from the embankment and without ever giving other nutrients to make these goats healthier. Meanwhile, usual healthy check of livestock is usually done by the livestock service department every five months and even if it requested by breeder groups.

If managed well and modern, this farm is likely to get maximum results and certainly can sustain their economy. Because the animal stool for a day if collected almost reaches 2-3 quintals. Therefore, if this is well maintained, it is possible become a fairly large goat farming center in this area.

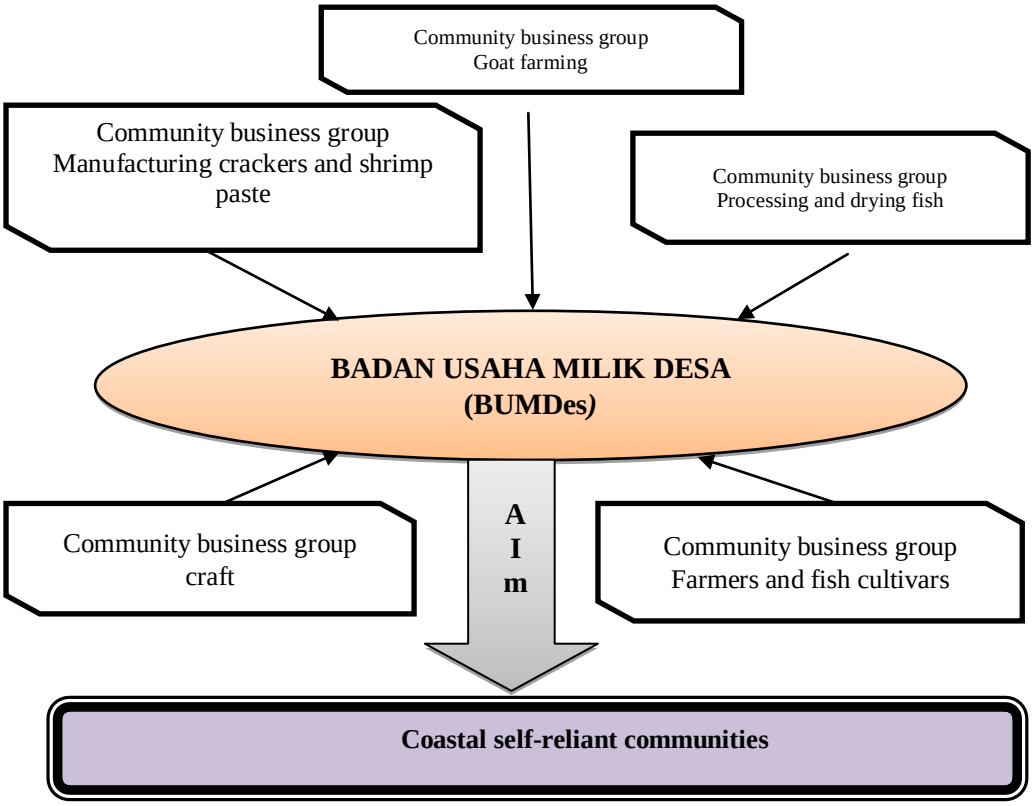
For that high effort is required from these breeders and assisted and given maximum coaching by the government to create new innovations in the management of this farm. In addition, at least this cooperation in farm management can make the level of marketing of goat livestock farming in a good management.

VII. Recommended Modeling of Economic Empowerment for Coastal Communities

From the findings above, actually the government has provided assistance to coastal communities in order to improve their welfare. But it does not seem right on the target yet. While the core problems faced by the main community especially the crackers maker, namely lack of appropriate government role in order to improve their economy.

Beside that the community is less able to catch new business opportunities from fish and shrimp product. Actually they can process the less marketable fish become other forms that will be easier to sell and of course the price can be more expensive.

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Picgure 2: Recommended Model of empowerment for Coastal communities

The marketing process will be managed by Badan Usaha Milik Desa (BUMDes) as mandated in Law Number 6 Year 2014 that the Village is expected to have BUMDes as one of the efforts to improve the welfare of the community. BUMDes is expected to be managed by professionals in marketing and other processes. The point is to find new breakthroughs for marketing of processed marine products made by the people of this village.

It takes the role of government to provide guidance to the community to open a new business opportunity that is making processed except cracker fish. These attempts include the manufacture of meatball from fish and shrimp, as well as the drying fish enterprise directed by the government.

Businesses that have been pioneered by the community in the form of crackers and shrimp paste home industry and marketing is still not good, it is expected this BUMDes can make new breakthroughs for better marketing. By cooperate with modern shop and supermarkets. With good marketing it is possible that the production will increase, thus it is believed that the addition of workers that are come from the local community.

Along with growing business managed by this community, BUMDes also become bigger. This is due to the inclusion of a percentage of each sale that occurred goes into the cash BUMDes. With the growing development of this managed business is expected later the village will become Self-sufficiency village and also become the Center of Processed Sea Product village.

This is the main asset for coastal community to expand their business into larger ones. In relation to the problems of home industry and fishery sector, goat farmers need to be empowered by government with more intense guidance.

Thus, it is believed their farm will be great. In this case the marketing system held in personal and group, can also through BUMDes that already have breakthroughs in marketing. From here it is certain that new jobs will occupy for these coastal communities. In addition, the farmers who are not member of existing breeder groups should immediately join, in order to get the same farming services.

Meanwhile, through maritime tourism, coastal tourism and religious tourism is also expected to sustain the economy of coastal communities. Moreover, it is expected that the government will immediately manage the coastal tourism of Permisan Bay and religious tourism to the grave site of Dewi Sekardadu. Well managed handling to these matters is expected to improve the economics of coastal villagers.

Thus, there will be new business opportunities as well as open jobs for local communities. This will all happen with the courage of the government and other parties and of course with the support and participation of local communities widely.

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To speed up the process of managing this tourism potential, community can cooperate with third parties and the investors to handle it. When this collaboration occurs then the process of tourism management will soon be resolved. And of course it will open a new job opportunity. With the opening of new jobs, it is possible that the economic level of the communities will increase. Furthermore, with the opening of this tourism object is expected to open the insight of this coastal community. Thus, they will soon get out of the shackles of poverty that they have faced so far.

Moreover, this tourism management system actually can be done jointly between the private sector, government and coastal communities. This system is more effective than if directly managed by the private sector, because the original aim was to improve the coastal community's economy.

Still, because in this area is very difficult to communicate using a cellular phone, it is expected that the cooperation with provider who willing and ready to make transmission transmitter in this area. This is possible because the tourists would want a smooth communication network. Thus, it is expected that the government will invite one or more providers to create a transmitting antenna in this area. Due to the smooth communication is expected tourists will be more happy to come to this place

VIII. Conclusion

From the analysis above, can be drawn conclusion as follows: (1) The economic level of coastal communities is still relatively low because there are still many people who are in the poverty line and almost poor, (2) People are less able to grasp the business opportunities that exist due to lack of coaching from the government, (3) It needs entrepreneurship coaching by government and private sector.

In order to solve these problems, both the government and the private sector are concerned, among others, to do some actions as follows: (1) The government provides entrepreneurship guidance to the community so that people will immediately grasp the existing business opportunities without always relying on government assistance, (2) The village government immediately established the BUMDes as well as looking for breakthroughs to sell processed products and livestock of the community. This is intended to accommodate all processed products made by the community to be marketed, (3) Optimized religious tourism area of Dewi Sekardadu grave site and Permisan Bay beach tourism and Mangrove Forest tour that will support the economics of coastal villagers.

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Tourism and Economy Growth in the Ecuadorian Province of Pastaza

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Abstract- Tourism in Ecuador is one of the main economic sectors, considered a strategic activity in the post- oil scenario. It's thought to be able to sustain local development as well as contributing to the country's progress in spheres such as economy, nature and culture. Tourism is one of the programs included within the Plan for Social and Economy Development at Pastaza Province. Research was performed with a descriptive approach, aimed at determining tourism contribution to Pastaza province economy, in the period 2010- 2019. Based on a documentary design, which included information from secondary sources, interviews and surveys of professionals, academics and managers of the sector. Relaying on data received from the province it was possible to set the foundation for identifying tourism behavior as well as its economic contribution. Summing up, tourism economic contribution to Pastaza province decreased, without there being a direct relationship between tourist activities and all economy within the period 2010-2019. This research shows the main causes influencing Pastaza touristic sector performance.

Keywords: *contribution to economic growth, economic impact of tourism, pastaza province.*

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Tourism and Economy Growth in the Ecuadorian Province of Pastaza

Julián Leoncio Rodríguez Rodríguez [α], Clímaco Geovani Espín Ortiz [σ] & Rafael Ángel Fuentes García [ρ]

Abstract- **Tourism in Ecuador is one of the main economic sectors, considered a strategic activity in the post- oil scenario. It's thought to be able to sustain local development as well as contributing to the country's progress in spheres such as economy, nature and culture. Tourism is one of the programs included within the Plan for Social and Economy Development at Pastaza Province. Research was performed with a descriptive approach, aimed at determining tourism contribution to Pastaza province economy, in the period 2010-2019. Based on a documentary design, which included information from secondary sources, interviews and surveys of professionals, academics and managers of the sector. Relaying on data received from the province it was possible to set the foundation for identifying tourism behavior as well as its economic contribution. Summing up, tourism economic contribution to Pastaza province decreased, without there being a direct relationship between tourist activities and all economy within the period 2010-2019. This research shows the main causes influencing Pastaza touristic sector performance.**

Keywords: contribution to economic growth, economic impact of tourism, pastaza province.

I. Introduction

Tourism is being seen as a sector which positively contributes to economic growth and development. Its contribution to world economy is significant; being currently the global second largest "industry". It's estimated it contributes with about the 10% of the world's GDP (WTO, 2021). Tourism main economic effects are related to foreign exchange income, job creation and its role as a catalyst of other sectors of local economies. (Brida et al., 2008; Aznar et al., 2016; Hall, 2019; Ozturk & Al-Kuwari, 2021).

Tourism is the third source of non-oil income in Ecuador. Foreign currency annual behavior from tourism in that country has registered a positive fluctuation over the past few years, moving from 781 MMUSD in 2010 to 2.282 MMUSD in 2019. Nonetheless, this sector hasn't have the same share in economy throughout all Ecuadorian regions. Tourism contribution to national economy among all the country's regions: Tourism contribution to domestic economy in all zones was as follows: 50% to the Coast, 46% to Mountain range and only 4% to the Amazonia (INEC, 2020).

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For decades the Amazonia's social and economic development has been distinguished by conflicts over land use, internal migration, and unequal opportunities. There's a high rate of poverty in Pastaza, because of unsatisfied basic needs (UBN), with a value of 69.7%; out of eight of the 21 parishes show very high levels of poverty, with NBI values between 96.7 and 100% (INEC, 2019). At provincial level, 65.4% of the population is urban and 34.6% is rural, a value above national average, which is of 62.8% for urban population. Pastaza dwells the least populated rural parishes in the country, with less than 1 000 inhabitants.

According to the World Tourism Barometer, the growth dynamics of Ecuador's tourism sector paused in 2020 due to Covid 19 pandemic, causing a reduction in international tourist arrivals by -75.9% and revenues by - 69.2%. (OMT, 2021). The World Tourism Organization's (UNWTO) predictions for July 2021, are no better. At the end of the first semester of 2021, Ecuador registers a contraction in international tourist arrivals of about -81.4%, compared to 2019 (UNWTO, 2021).

This paper is mainly aimed at determining tourism contribution to Pastaza economy; a province distinguished by its large biodiversity and cultural richness which is displayed throughout all its territory by all native peoples and nationalities living there. (GADPPz, 2019). Pastaza dwells seven native nationalities living through all the zone. Each of them preserving its own language and culture. (Luna and Lastra, 2020). All these particular features become both recreational tourist attractions and of scientific interest. (Izurieta, et al., 2021)

II. Public Policy on Tourism in Ecuador

Public policy on tourism is endorsed in the Constitution of the Republic enacted in 2008. According to what's legislated in the constitution, a legal framework for tourism management has been set up, being focused on sustainable development in the economic, socio- cultural and environmental dimensions. Among the main documents that govern tourism policy in Ecuador there are as follows:

- The Constitution of Ecuador (art. 38, 48 and 383) and (art. 275, 283, 275 and 283).
- The National Tourism Development Plan 2030 (Axes 1, 2, 4 and 5).
- Tourism Law and General Regulations.

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According to Piguave and Suárez (2021), in Ecuador's public tourism policy, the following principles can be highlighted: recreational rights, its inclusiveness, sustainable economic development, socio-cultural development and improvement of living conditions.

In 2008, Ecuador's new public policy and its implementation principles came into force for 14 productive sectors, including tourism, in hopeful expectation it would do far in changing the country's economic structure. Although progress was made in the touristic sector's economic revitalization, compared to years prior to 2008; tourism goals concerted on the plans for tourism development were not achieved, despite the institutional priority and the legal framework update, defined for tourism management.

III. Theoretical Framework

a) Tourism as a Factor of Growth

Tourism sector is perceived as a positive contributor to economic growth and development. Its contribution to world economy is significant, being currently the second largest "industry" in the world (WTTC, 2020). Its contribution to world GDP is estimated at around 10%. Tourism main economic effects are related to foreign currency earnings, job creation and its role as a catalyst for other sectors of local economies. (Brida et al., 2016; Hall, 2019; Sharpley, 2020) The link between tourism and economic growth has been widely analyzed through various theoretical approaches. For better understanding upon which are tourism transferring mechanisms to a region economy, it is vital to previously understand what the determining factors for economic growth can be.

b) The Concept of Development

The Concept Development has been the object of reflections throughout the history of thought. This issue began to be studied more systematically in the discipline of economics. The concern for development is inherent part of economy since its very dawn; this concept first notions can be found in authors from the seventeenth and eighteenth century or in today's authors. (Sen, 2013)

As for the concept of sustainable development, its meaning is not yet completely clear since many authors have different approaches. On the one hand, there is a conception that natural resources exploitation and GDP growth are necessary. According to Hickel (2019), followers of this approach to economic growth consider that technology will be able to mitigate the problems of inefficient use of resources; which will make it possible to grow economically at a rate that allows the regeneration of the environment. However, in practical terms, this hypothesis has been developed with unquestionable weaknesses that have not allowed its full application. (Lalangui, et al., 2017; Tugcu, 2020; Menegaki, et al., 2021; Ostero & Al-Kuwari, 2021)

The contradiction between development and natural resources was a central theme of the United Nations Conference on the Human Environment, which was held in June 1972 in Stockholm, Sweden. In this context, the report carried out by a group of researchers from the Massachusetts Institute of Technology at the request of the Club of Rome stands out, whose conclusions were:

> "If current trends in world population growth, industrialization, environmental pollution, food production and resource depletion continue, this planet will reach the limits of its growth over the next hundred years. The most likely outcome would be a sudden and uncontrollable decline in both population and industrial capacity" (Meadows, 1972)

c) The Concept of Sustainability

In 1987, the United Nations World Commission for Environment and Development released the report known as "Our Common Future" or Brundtland Report, which reflects the best known and most widespread definition of sustainable development (United Nations, 1987):

> "One who seeks to satisfy the needs of the present without compromising the ability of future generations to meet their own needs".

The concept of sustainability becomes the necessary model to establish development strategies in all spheres and sectors of production. In tourist activity, numerous actions and definitions for the development of sustainable tourism have been exposed by international organizations.

d) Sustainable Tourism

UNWTO defines sustainable tourism as the one that "... meets the needs of present tourists and host regions, while protecting and enhancing future opportunities. It is focused on managing all resources in such a way that all economic, social and aesthetic needs are met while respecting cultural integrity, essential ecological processes, biological diversity and life support systems" (OMT, 2004).

Three decades after the definition of the concept of sustainable development, institutional advances do not prove to have achieved its practical application. The fact leads to question whether the approaches and the media can change current trends or if on the contrary they favor them. Table 1

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Table 1: Key Facts Associated to the Definition of Sustainable Development Concept

Year	Event/Contributions
1980	"I World Strategy for the Conservation of Nature and Natural Resources" (United Nations Environment Program).
1987	"Our Common Future" Report (Brundtland Report of the United Nations World Commission on Environment and Development).
1991	"The World Strategy for the Conservation of Nature and Natural Resources" (United Nations Environment Program and World Wide Fund for Nature).
2012	Rio + 20 Conference of Nations. A new sharing is presented whose objectives were focused on renewing the commitment to sustainable development.
2015	International Network on Regional Economics, Mobility and Tourism Organization. This event is considered as a first step of basic statistical information for the regions and other territorial aggregates.
2018	18th Meeting of the Statistics Committee at UNWTO. Progress towards a consistent and coherent statistical approach to measure sustainable tourism.
2019	UNWTO/UN, 2019. "Reference report on the integration of sustainable consumption and production patterns in tourism policies." PR 1904.

IV. Methodology

a) Methods for Measuring Tourism Contribution to Economic Growth

Various methods have been used to measure the economic impact of tourism, such as the significance analysis that analyzes the size and structure of the tourism sector; the impact analysis that analyzes the money spent by tourists and the cost-benefit analysis focused on evaluating the feasibility and efficiency of tourism projects. (Zurub, et al., 2015) Specifically, there are some methodologies to estimate the impact of tourism on GDP, such as the Tourism Satellite Accounts, the Computable General Equilibrium, as well as the growth of tourism GDP as a percentage of GDP growth total (Ivanov & Webster, 2007; Rasool et al., 2021).

Ivanov and Webster (2007) developed a method for assessing tourism contribution to economic growth by means of the real GDP growth rate per capita, because by definition economic growth is equal to the real GDP growth rate per capita. This is taken in a disaggregated way in order to have, separately, growth generated by tourism and the generated by other sectors. The methodology proposed by Ivanov and Webster has been applied in several countries (Brida, et al., 2008; Such, et al., 2009; Fuinhas, et al., 2020).

Information collected from secondary sources, based on papers and researches already issued, was also included. Likewise, data was collected from entities such as the UNWTO, the Ministry of Tourism of Ecuador (MINTUR) and the National Institute of Statistics and Censuses (INEC), accountability reports from autonomous governments, as well as Interviews and surveys carried out to tourism professionals, academics and managers.

The current state of tourism in Pastaza was verified from the Weighed Participatory Strategic Test (WPST), a combination of two traditional test methods, SWOT and Delphi (Miller, 2001; Choi & Sirakaya, 2005).

A workshop was held in order to assess tourism performance in Pastaza, where key players involved in local tourism management attended, furthermore SWOT analysis was applied. After all the criteria had been analyzed and evaluated, the lists were reduced and the prevailing ideas identified by voting were used for the Analysis, together with tourist environment elements (Weaknesses, Threats, Strengths and Opportunities).

The environmental elements identified in the SWOT analysis upon Pastaza tourism development were evaluated by experts with close links between professional, institutional and/or research activity. The analysis was carried out using a Likert-type scale (1-5) (from 1 = none to 5 = maximum), by means of which it was granted the importance each element in the tourist context of the province has. The elements were validated using Cronbach's alpha reliability coefficients, an internal consistency analysis using corrected total correlation coefficients of elements and questions of the quantitative aspects with different reliability levels to validate those items.

Tourism sector is analyzed in this research based on statistics from hotels and restaurants. A Gross Added Value (GAV) indicator was used for measuring the added value performed by each sector in the final goods and services production process. GAV was studied in each specific activity in the period between 2010 and 2019.

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b) *Scope of the Study Area: Characteristics and Location*

Pastaza province is located in the center of the Ecuadorian Amazon Region, between the geographic coordinates of 1 ° 10 south latitude and 78 ° 10 west longitude; and 2 ° 35 of south latitude and 76 ° 40 of west longitude. It borders the province of Napo and Orellana to the North, the province of Morona Santiago to the South, the Republic of Peru to the east and the province of Tungurahua to the west. It belongs to the humid tropical zone of the continent with an annual average temperature between 18 and 24 ° C. Figure 1.



Source: Extracted from https://imagenesnoticias.com/mapa-del-ecuador

Figure 1: Pastaza province geographic location in Ecuador

c) *Players' identification and their tourism perception in Pastaza province*

Players' identification and their perception of tourism in Pastaza province was carried out mainly through semi-structured interviews. This type of interview gives freedom not only but also to the interviewee and the interviewer as well, allowing all relevant topics to be included and all the necessary information can be collected. (Chan & Cheung, 2020; Husband, 2020).

In order to guarantee the results to show the internal and external conditions affecting the development of tourism and its contribution to the province's economy. It was settled that the interviewees to be people devoted to different areas of knowledge:

- University professors linked to research on tourism planning of natural spaces and environment.
- Trained professionals from public, tourist and environmental institutions.
- Institutions and / or public and private organizations members related to natural spaces planning and management.
- Professionals from private companies with experience in tourism planning and management of natural spaces.
- Community representatives in areas used for tourism.

In all cases, the existence of a close link between the professional, institutional and / or research activity of the invited experts to collaborate and the subjects under study was established as a requirement. The surveys and interviews technical sheet include the process core elements. Table 2

Table 2: Surveys and interviews Technical file

Items	Details
Unit	Hotels, hostels, accommodation, guest houses, travel agencies, universities and public and private organizations.
Interviewees	Directors, professionals, academics, owners and tourism managers.
Extension	Pastaza, Mera, Santa Clara and Arajuno municipalities, the Ministry of Environment, Pastaza Chambers of Commerce and Chamber of Tourism
Time	Fieldwork, August 2017 to February 2018 and July to September 2019.
Response rate	100% of the managers from the province four municipalities, managers and appointed professionals from the Ministries of Tourism and Environment.
Program	SPSS version 25.0, SWOT analysis on the tourism sector in Pastaza province, Cronbach's Alpha 0.944 based on standardized elements.

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36% of those surveyed are doctors in different branches of knowledge. The presidents of the Chamber of Commerce and the Chamber of Tourism attended. A Seminar-Workshop was held where 57 businessmen and professionals from the sector participated.

V. Results

a) *Identification of entrepreneurs and their perception of tourism in Pastaza*

Stakeholders participation in planning tourism on surveys and interviews with many tourism stakeholders in Pastaza, allowed the community to be involved and to learn about the key principles helping to create unions and foster cooperation. Furthermore, by means of these actions, criteria were shared on tourism benefits and threats from the point of view of the community, professionals, government managers and public entrepreneurs.

Understanding tourist environment of the sector in Pastaza, based on SWOT analysis, will give the chance to define strategic lines of action that can be organized to ensure the sector stability, but above all this to favor its growth.

Those ones consulted attribute similar importance to internal factors (Weaknesses and Strength) as to external factors (Opportunities and Threats). However, there is consensus among those ones consulted on the need to increase the socioeconomic weight of tourism in the province. In addition, they recognize that there are problems in the province on basic aspects to achieve tourism real development demanding a greater national institutional support. Table 3

Table 3: Elements of touristic environment in Pastaza province

	Strengths		Weaknesses
1	Amazonia with great diversity at a global level.	11	Lack of promotion and marketing channels.
2	The existing natural, cultural and historical heritage.	12	Limited integration between tourism and the rest of the sectors.
3	Need to increase the sector weight.	13	Lack of strategies for tourism development in the region.
4	Hospitality and peacefulness	14	Lack of information for decision making.
5	Being close to destinations with a large flow of visitors.	15	15 Seasonality and tourists stay.
	Opportunities		**Threats**
6	National policy on conscious tourism.	16	Lack of promotion and marketing channels. .
7	Creation of new marketing channels.	17	Geographical situation.
8	Tourism as a catalyst for Amazonia development.	18	Meteorological instability affecting tourist offer.
9	Tourism for poverty reduction.	19	Strong competition with tourism markets in the region. .
10	Tourism for environmental protection.	20	National and international economic situation.

Source: Based on a workshop seminar held in 2016, 2019

Analysis' elements related to tourist environment being ranked based on the ratings given by the experts. Table 4

Table 4: Elements at SWOT Analysis tied to the touristic environment in Pastaza province

Item	Elements*	Rate	Order
Strength	1, 2, 3, 4, 5	4,24	IV
Opportunities	6, 7, 8, 9, 10	4,25	III
Weaknesses	17, 18, 19, 20	4,26	II
Threats	11, 12, 13, 14, 15	4,31	I

*Elements identification as per numbers appearing within the list on Table 3

Source: Based on survey results.

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The interviews and to a lesser extent the surveys carried out in this sector show us that the approach, to face the unfavorable situation that tourism in Pastaza is going through. Firstly it's focused on overcoming its weaknesses, which is justified by the province little development of as a tourist destination suggesting a lack of management and leadership experience within the sector.

b) *Pastaza province main economic and productive activities*

According to data provided by Banco Central de Ecuador (2019), Pastaza province activity with the highest participation in the economy is oil and natural gas drilling with 52.0% of the GAV, followed by the public administration with 5.7% and transport and storage activities with 5.6%. Tourist activities, accommodation and restaurant services only represent 2.2%. Table 5

Table 5: Pastaza Province Main Economic Activities in 2019

	Economic and Productive Activities	Contribution GAV $(000)	% from total GAV
1	Oil drilling, gas and related services	380,453	52.0
2	Administración pública, defensa, seguridad social	54,306	7.4
3	Education	42,256	5.7
4	Construction	37,595	5.1
5	Transport and Warehousing	33,296	4.5
6	Social and Health Services	29,830	4.1
7	Trade and automotive vehicle repairs	26,035	3.6
8	Forestry, timber harvest and related activities	18,379	2.5
9	Financial services activities	17,369	2.2
10	Accommodation and food services	16,078	2.1
11	Real Estate Activities	14,529	1.6
12	Other productive and service activities	60,822	8.3
	Total general	730,948	100.0

Source: Based on data provided by Banco Central de Ecuador (2020).

c) *Behavior of economic sectors in Pastaza province*

Oil export and banana, cocoa and roses sales, among other products, have been increased in Ecuador in the last few years. In order to achieve sustainable development but not depending on oil drilling, the country's strategy is to transform the productive matrix aimed at exporting products and services with greater added value. It's been raises to take advantage of human resources, raw materials transforming industries together with agriculture development, which eventually will gradually make possible imports substitution and exports growth. This research was based on figures provided by Banco Central de Ecuador (2020), the following sectors were considered as parts of Pastaza economy:

– *Primary:* Oil and Natural gas drilling and service activities related to agriculture and forestry, timber production and activities related to fishing and fish farming (except shrimp), mining and quarrying. In 2010 this sector contributed with 535 million dollars and 409.2 in 2019, which meant a reduction of 23.5%.

– *Secondary:* Meat production, wood production and wooden products, textile products manufacturing, clothing; and leather goods, milling products, bakery and pasta, paper manufacturing, furniture and metal products, heavy industry, dairy products, beverages and cigar products, among other foodstuff. The secondary sector contributed with 9.2 million dollars to the province's economy and 16.3 in 2019, representing an increase of 76.9% in 2010

– *Tertiary*: Administrative, social and health services, commerce, financial services activities, accommodation and food services, real estate activities, courier and communications, professional activities. Electricity and water supply. In 2010, the tertiary sector contributed with 214.1 million dollars to the province's economy and 303.9 million in 2019, which represents a growth of 41.9%.

d) *Comparing tourism contribution between Pastaza and four selected provinces*

Assessing tourism as an economic growth engine is directly based on the hypothesis which

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considers exports as a driving force for economic growth. According to Brida et al. (2013), tourism fuels economic growth, which admits a two-way relationship between both variables.

In the period 2010-2019 the differences between Ecuadorian provinces economies were huge. Pichincha and Guayas contributed with 54.6% of the country's GAV and 58.3% of the tourism sector's GAV. Last decade, the Ecuadorian economy grew a 51.6% in terms of an absolute variation. This growth has contributed to a reduction in poverty rates. The provinces of Pichincha, Guayas, Tungurahua and Azuay rank among the ones with the lowest poverty rate in the country. (INEC, 2019) Meanwhile, Pastaza economy did not grow in the period. Table 6

Table 6: Ecuadorian economy behavior nationwide and within Pichincha, Guayas, Tungurahua, Azuay y Pastaza Provinces. (GAV in Thousand of dollars)

Year	Ecuador	Pichincha	Guayas	Tungurahua	Azuay	Pastaza
2010	66,499,460	16,449,770	1,792,863	1,792,863	3,353,436	759,702
2011	76,536,215	18,292,542	2,029,842	2,029,842	3,727,619	1,134,771
2012	83,856,171	20,662,585	2,271,712	2,271,712	3,944,848	1,042,881
2013	90,533,862	22,956,885	2,375,376	2,375,376	4,222,873	1,032,771
2014	96,894,741	25,865,822	2,524,414	2,524,414	4,432,976	981,797
2015	92,042,505	25,312,810	2,757,000	2,757,000	4,765,706	613,011
2016	93,038,286	25,650,241	2,682,274	2,682,274	4,782,811	546,685
2017	97,082,733	26,406,871	2,857,483	2,857,483	5,013,920	634,614
2018	99,955,953	26,571,645	2,866,045	2,866,045	5,343,370	713,844
2019	100,871,577	27,025,827	2,799,401	2,799,401	5,414,337	730,948

Source: Based on data provided by Banco Central de Ecuador (2020).

Annual tourism revenues nationwide as well as in the provinces of Pichincha, Guayas, Tungurahua and Azuay grew. The provinces Tungurahua and Azuay stand out, reaching annual growth rates of 35.7% and 12.2% respectively. Though Pastaza annual rate decreased by 1.57%. Table 7

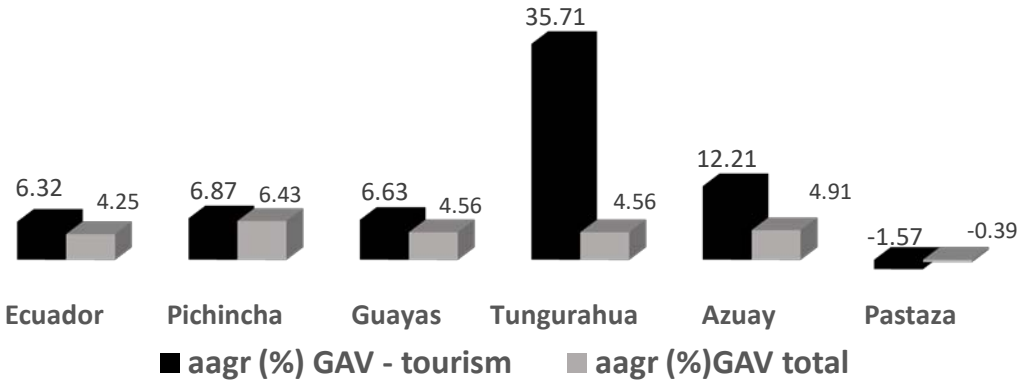
Table 7: Tourism sector contribution nationwide and in the provinces of Pichincha, Guayas, Tungurahua, Azuay and Pastaza. (GAV Thousands of dollars)

Year	Ecuador	Pichincha	Guayas	Tungurahua	Azuay	Pastaza
2010	1,312,445	333,026	459,820	54,161	46,839	18,829
2011	1,427,889	386,472	481,965	67,984	56,613	15,110
2012	1,631,804	477,044	495,421	94,979	68,384	19,608
2013	1,877,562	543,926	619,778	97,121	70,544	18,504
2014	2,054,398	615,151	721,742	85,708	69,222	17,108
2015	2,083,056	625,220	715,490	83,077	77,855	16,152
2016	2,123,199	649,042	717,626	88,993	74,648	17,894
2017	2,225,384	673,288	733,036	103,968	105,874	13,757
2018	2,314,342	664,007	687,524	138,458	132,688	17,285
2019	2,422,591	647,137	764,704	147,592	148,203	16,078

Source: Based on data provided by Banco Central de Ecuador (2020).

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Tourism in Pastaza province registered negative rates, unlike the national and selected provinces performance in the period 2010-2019. Figure 2



Source: Based on the figures reported in tables 6 and 7

Figure 2: Average annual growth rate (aagr) of tourism in Ecuador and the provinces: Pichincha, Guayas, Tungurahua, Azuay and Pastaza, in the period 2010-2019

Correlation between tourism contribution and economy growth was determined using data on Tables 6 and 7, combining a temporal dimension with a transversal one in order to apply Pearson's correlation as well as contrasting work hypothesis.

Table 8: Correlations of tourism contribution to Pastaza economy, Ecuador and some selected provinces within 2010-2019 period. (Thousands of dollars)

	GAV	Average	Deviation	Pearson
Ecuador	Tourism	1.947.267	389.444	,965**
	Total	89.731.150	1.096.230	,965**
Pichincha	Tourism	561.431	122.572	,992**
	Total	23.519.499	378.577	,992**
Guayas	Tourism	639.711	117.200	,921**
	Total	2.495.641	371.160	,921**
Azuay	Tourism	85.087	68.82	,897**
	Total	4.500.189	330.97	,897**
Tungurahua	Tourism	96.204	28.650	,751*
	Total	2.495.641	371.160	,751*
Pastaza	Tourism	17.032	1.793	,236
	Total	819.102	209.482	,236

**meaningful at 0, 05 level; ** meaningful at 0, 01 level*
Source: Based on data provided by Banco Central de Ecuador (2020).

e) *Pearson's correlation among (non-oil) economic sectors with the highest contribution to GDP and tourism in Ecuador in the period 2010-2019*

Data from the Ministry of Tourism of Ecuador and INEC were used. The information was processed using the SPSS 25 software. The combination of a temporal dimension with another transversal to apply Pearson's correlation contrasted the working hypothesis: accommodation and food services as economic activity has a significant impact on other sectors economic growth. Table 9

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Table 9: Correlation among tourism GAV and other economic sectors in Ecuador provinces.

Activity	Pichincha	Guayas	Tungurahua	Azuay	Pastaza	Ecuador
Construction	,751*	,835**	,340	,880**	-,406	,912**
Forestry	,686	,848**	,490	,719*	-,150	,597
Trade	,360	,929**	,614	,675	-,413	,851**
Real Estate	,597	,740*	-,130	,670*	,216	,831**

***Meaningful correlation at 0, 01 level; * Meaningful correlation at 0, 05 level*

VI. Discussion

Previous research on tourism participation in Ecuador's economy has been focused on measuring its nationwide contribution, without estimating its impact on each of the country's provinces; something important in Ecuador as it is a very heterogeneous country where the economic growth generated by tourism is different for each region. Thus, public policies focused on tourism must be different as per the zone in question.

In the 2010-2019 period, the tourism average annual growth rate registered negative figures in Pastaza, despite the fact that in the same period the province tertiary sector grew by 41.9%. Tourism is considered a relevant activity for the tertiary sector, however, in Pastaza it has not represented an important contribution to this sector growth.

Despite the fact that researches being carried out in other countries demonstrate tourism relationship with trade and real estate services at international level, there is little research on this relationship within provincial level. (Brida et al., 2008; Aznar et al., 2016; Hall, 2019). This article shows there is a direct relationship between tourism and other sectors, regarding Ecuadorian provinces cases where the economy is growing.

Pastaza has a surprising potential for sustainable tourism, because of its natural and cultural heritage. Among its tourist attractions, however, this tourist potential has not yet become a source of income and employment. Based on different methods and sources, it is considered the main problems tourism faced in Pastaza province are:

- Limited integration between tourism and the rest of the sectors.
- Lack of strategies for developing tourism in the region.
- Lack of useful information for decision making.

VII. Conclusions

The research, without attempting to be exhaustive, provides elaboration statistics where various estimates are highlighted on tourism contribution to Pastaza province economy, as well as expert evaluations on inner and outer elements involved in tourism development. These results are considered a must to define policies, strategies and concrete actions needed to support tourism sustainable development.

The annual behavior of foreign currency earnings from tourism in Ecuador has registered a positive variation for the last 10 years. However, tourism sector has not had the same participation in the economy in all regions. The Coast contributed 50% of GDP and the Sierra 46%, while the Amazon only contributed 4%. Analyzes by provinces have shown an uneven development level of the tourism sector, which tend to believe accurate public policies for tourism are needed in order to suit their characteristics.

The research showed the main causes affecting tourism performance in Pastaza are influenced by: the current economic scenario, a limited integration between tourism and the rest of the sectors, a lack in renewing strategies for tourism development and a lack of statistical records and strategic information for decision-making.

Tourism as an alternative to reduce poverty in the province of the Amazon regions requires comprehensive solutions involving not only to face other problems related to basic infrastructure construction but also using heritage for tourism purposes as well.

A strengthening of tourism sustainable development in Pastaza requires a work orientation that fosters, starting from tourism, companies' competitiveness, jobs creation and public-private alliances based on mechanisms that allow an integration between tourism and the all other sectors of the economy and society.

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We accept the manuscript submissions in any standard (generic) format.

We typeset manuscripts using advanced typesetting tools like Adobe In Design, CorelDraw, TeXnicCenter, and TeXStudio. We usually recommend authors submit their research using any standard format they are comfortable with, and let Global Journals do the rest.

Alternatively, you can download our basic template from https://globaljournals.org/Template.zip

Authors should submit their complete paper/article, including text illustrations, graphics, conclusions, artwork, and tables. Authors who are not able to submit manuscript using the form above can email the manuscript department at submit@globaljournals.org or get in touch with chiefeditor@globaljournals.org if they wish to send the abstract before submission.

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Acknowledgments

Contributors to the research other than authors credited should be mentioned in Acknowledgments. The source of funding for the research can be included. Suppliers of resources may be mentioned along with their addresses.

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The following is the official style and template developed for publication of a research paper. Authors are not required to follow this style during the submission of the paper. It is just for reference purposes.

Manuscript Style Instruction (Optional)

- Microsoft Word Document Setting Instructions.
- Font type of all text should be Swis721 Lt BT.
- Page size: 8.27" x 11'", left margin: 0.65, right margin: 0.65, bottom margin: 0.75.
- Paper title should be in one column of font size 24.
- Author name in font size of 11 in one column.
- Abstract: font size 9 with the word "Abstract" in bold italics.
- Main text: font size 10 with two justified columns.
- Two columns with equal column width of 3.38 and spacing of 0.2.
- First character must be three lines drop-capped.
- The paragraph before spacing of 1 pt and after of 0 pt.
- Line spacing of 1 pt.
- Large images must be in one column.
- The names of first main headings (Heading 1) must be in Roman font, capital letters, and font size of 10.
- The names of second main headings (Heading 2) must not include numbers and must be in italics with a font size of 10.

Structure and Format of Manuscript

The recommended size of an original research paper is under 15,000 words and review papers under 7,000 words. Research articles should be less than 10,000 words. Research papers are usually longer than review papers. Review papers are reports of significant research (typically less than 7,000 words, including tables, figures, and references)

A research paper must include:

a) A title which should be relevant to the theme of the paper.
b) A summary, known as an abstract (less than 150 words), containing the major results and conclusions.
c) Up to 10 keywords that precisely identify the paper's subject, purpose, and focus.
d) An introduction, giving fundamental background objectives.
e) Resources and techniques with sufficient complete experimental details (wherever possible by reference) to permit repetition, sources of information must be given, and numerical methods must be specified by reference.
f) Results which should be presented concisely by well-designed tables and figures.
g) Suitable statistical data should also be given.
h) All data must have been gathered with attention to numerical detail in the planning stage.

Design has been recognized to be essential to experiments for a considerable time, and the editor has decided that any paper that appears not to have adequate numerical treatments of the data will be returned unrefereed.

i) Discussion should cover implications and consequences and not just recapitulate the results; conclusions should also be summarized.
j) There should be brief acknowledgments.
k) There ought to be references in the conventional format. Global Journals recommends APA format.

Authors should carefully consider the preparation of papers to ensure that they communicate effectively. Papers are much more likely to be accepted if they are carefully designed and laid out, contain few or no errors, are summarizing, and follow instructions. They will also be published with much fewer delays than those that require much technical and editorial correction.

The Editorial Board reserves the right to make literary corrections and suggestions to improve brevity.



Format Structure

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Author details

The full postal address of any related author(s) must be specified.

Abstract

The abstract is the foundation of the research paper. It should be clear and concise and must contain the objective of the paper and inferences drawn. It is advised to not include big mathematical equations or complicated jargon.

Many researchers searching for information online will use search engines such as Google, Yahoo or others. By optimizing your paper for search engines, you will amplify the chance of someone finding it. In turn, this will make it more likely to be viewed and cited in further works. Global Journals has compiled these guidelines to facilitate you to maximize the web-friendliness of the most public part of your paper.

Keywords

A major lynchpin of research work for the writing of research papers is the keyword search, which one will employ to find both library and internet resources. Up to eleven keywords or very brief phrases have to be given to help data retrieval, mining, and indexing.

One must be persistent and creative in using keywords. An effective keyword search requires a strategy: planning of a list of possible keywords and phrases to try.

Choice of the main keywords is the first tool of writing a research paper. Research paper writing is an art. Keyword search should be as strategic as possible.

One should start brainstorming lists of potential keywords before even beginning searching. Think about the most important concepts related to research work. Ask, “What words would a source have to include to be truly valuable in a research paper?” Then consider synonyms for the important words.

It may take the discovery of only one important paper to steer in the right keyword direction because, in most databases, the keywords under which a research paper is abstracted are listed with the paper.

Numerical Methods

Numerical methods used should be transparent and, where appropriate, supported by references.

Abbreviations

Authors must list all the abbreviations used in the paper at the end of the paper or in a separate table before using them.

Formulas and equations

Authors are advised to submit any mathematical equation using either MathJax, KaTeX, or LaTeX, or in a very high-quality image.

Tables, Figures, and Figure Legends

Tables: Tables should be cautiously designed, uncrowned, and include only essential data. Each must have an Arabic number, e.g., Table 4, a self-explanatory caption, and be on a separate sheet. Authors must submit tables in an editable format and not as images. References to these tables (if any) must be mentioned accurately.

Figures

Figures are supposed to be submitted as separate files. Always include a citation in the text for each figure using Arabic numbers, e.g., Fig. 4. Artwork must be submitted online in vector electronic form or by emailing it.

Preparation of Eletronic Figures for Publication

Although low-quality images are sufficient for review purposes, print publication requires high-quality images to prevent the final product being blurred or fuzzy. Submit (possibly by e-mail) EPS (line art) or TIFF (halftone/ photographs) files only. MS PowerPoint and Word Graphics are unsuitable for printed pictures. Avoid using pixel-oriented software. Scans (TIFF only) should have a resolution of at least 350 dpi (halftone) or 700 to 1100 dpi (line drawings). Please give the data for figures in black and white or submit a Color Work Agreement form. EPS files must be saved with fonts embedded (and with a TIFF preview, if possible).

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Tips for writing a good quality Social Science Research Paper

Techniques for writing a good quality homan social science research paper:

1. Choosing the topic: In most cases, the topic is selected by the interests of the author, but it can also be suggested by the guides. You can have several topics, and then judge which you are most comfortable with. This may be done by asking several questions of yourself, like "Will I be able to carry out a search in this area? Will I find all necessary resources to accomplish the search? Will I be able to find all information in this field area?" If the answer to this type of question is "yes," then you ought to choose that topic. In most cases, you may have to conduct surveys and visit several places. Also, you might have to do a lot of work to find all the rises and falls of the various data on that subject. Sometimes, detailed information plays a vital role, instead of short information. Evaluators are human: The first thing to remember is that evaluators are also human beings. They are not only meant for rejecting a paper. They are here to evaluate your paper. So present your best aspect.

2. Think like evaluators: If you are in confusion or getting demotivated because your paper may not be accepted by the evaluators, then think, and try to evaluate your paper like an evaluator. Try to understand what an evaluator wants in your research paper, and you will automatically have your answer. Make blueprints of paper: The outline is the plan or framework that will help you to arrange your thoughts. It will make your paper logical. But remember that all points of your outline must be related to the topic you have chosen.

3. Ask your guides: If you are having any difficulty with your research, then do not hesitate to share your difficulty with your guide (if you have one). They will surely help you out and resolve your doubts. If you can't clarify what exactly you require for your work, then ask your supervisor to help you with an alternative. He or she might also provide you with a list of essential readings.

4. Use of computer is recommended: As you are doing research in the field of homan social science then this point is quite obvious. Use right software: Always use good quality software packages. If you are not capable of judging good software, then you can lose the quality of your paper unknowingly. There are various programs available to help you which you can get through the internet.

5. Use the internet for help: An excellent start for your paper is using Google. It is a wondrous search engine, where you can have your doubts resolved. You may also read some answers for the frequent question of how to write your research paper or find a model research paper. You can download books from the internet. If you have all the required books, place importance on reading, selecting, and analyzing the specified information. Then sketch out your research paper. Use big pictures: You may use encyclopedias like Wikipedia to get pictures with the best resolution. At Global Journals, you should strictly follow here.



6. Bookmarks are useful: When you read any book or magazine, you generally use bookmarks, right? It is a good habit which helps to not lose your continuity. You should always use bookmarks while searching on the internet also, which will make your search easier.

7. Revise what you wrote: When you write anything, always read it, summarize it, and then finalize it.

8. Make every effort: Make every effort to mention what you are going to write in your paper. That means always have a good start. Try to mention everything in the introduction—what is the need for a particular research paper. Polish your work with good writing skills and always give an evaluator what he wants. Make backups: When you are going to do any important thing like making a research paper, you should always have backup copies of it either on your computer or on paper. This protects you from losing any portion of your important data.

9. Produce good diagrams of your own: Always try to include good charts or diagrams in your paper to improve quality. Using several unnecessary diagrams will degrade the quality of your paper by creating a hodgepodge. So always try to include diagrams which were made by you to improve the readability of your paper. Use of direct quotes: When you do research relevant to literature, history, or current affairs, then use of quotes becomes essential, but if the study is relevant to science, use of quotes is not preferable.

10. Use proper verb tense: Use proper verb tenses in your paper. Use past tense to present those events that have happened. Use present tense to indicate events that are going on. Use future tense to indicate events that will happen in the future. Use of wrong tenses will confuse the evaluator. Avoid sentences that are incomplete.

11. Pick a good study spot: Always try to pick a spot for your research which is quiet. Not every spot is good for studying.

12. Know what you know: Always try to know what you know by making objectives, otherwise you will be confused and unable to achieve your target.

13. Use good grammar: Always use good grammar and words that will have a positive impact on the evaluator; use of good vocabulary does not mean using tough words which the evaluator has to find in a dictionary. Do not fragment sentences. Eliminate one-word sentences. Do not ever use a big word when a smaller one would suffice.

Verbs have to be in agreement with their subjects. In a research paper, do not start sentences with conjunctions or finish them with prepositions. When writing formally, it is advisable to never split an infinitive because someone will (wrongly) complain. Avoid clichés like a disease. Always shun irritating alliteration. Use language which is simple and straightforward. Put together a neat summary.

14. Arrangement of information: Each section of the main body should start with an opening sentence, and there should be a changeover at the end of the section. Give only valid and powerful arguments for your topic. You may also maintain your arguments with records.

15. Never start at the last minute: Always allow enough time for research work. Leaving everything to the last minute will degrade your paper and spoil your work.

16. Multitasking in research is not good: Doing several things at the same time is a bad habit in the case of research activity. Research is an area where everything has a particular time slot. Divide your research work into parts, and do a particular part in a particular time slot.

17. Never copy others' work: Never copy others' work and give it your name because if the evaluator has seen it anywhere, you will be in trouble. Take proper rest and food: No matter how many hours you spend on your research activity, if you are not taking care of your health, then all your efforts will have been in vain. For quality research, take proper rest and food.

18. Go to seminars: Attend seminars if the topic is relevant to your research area. Utilize all your resources.
Refresh your mind after intervals: Try to give your mind a rest by listening to soft music or sleeping in intervals. This will also improve your memory. Acquire colleagues: Always try to acquire colleagues. No matter how sharp you are, if you acquire colleagues, they can give you ideas which will be helpful to your research.

19. Think technically: Always think technically. If anything happens, search for its reasons, benefits, and demerits. Think and then print: When you go to print your paper, check that tables are not split, headings are not detached from their descriptions, and page sequence is maintained.

20. Adding unnecessary information: Do not add unnecessary information like "I have used MS Excel to draw graphs." Irrelevant and inappropriate material is superfluous. Foreign terminology and phrases are not apropos. One should never take a broad view. Analogy is like feathers on a snake. Use words properly, regardless of how others use them. Remove quotations. Puns are for kids, not grunt readers. Never oversimplify: When adding material to your research paper, never go for oversimplification; this will definitely irritate the evaluator. Be specific. Never use rhythmic redundancies. Contractions shouldn't be used in a research paper. Comparisons are as terrible as clichés. Give up ampersands, abbreviations, and so on. Remove commas that are not necessary. Parenthetical words should be between brackets or commas. Understatement is always the best way to put forward earth-shaking thoughts. Give a detailed literary review.

21. Report concluded results: Use concluded results. From raw data, filter the results, and then conclude your studies based on measurements and observations taken. An appropriate number of decimal places should be used. Parenthetical remarks are prohibited here. Proofread carefully at the final stage. At the end, give an outline to your arguments. Spot perspectives of further study of the subject. Justify your conclusion at the bottom sufficiently, which will probably include examples.

22. Upon conclusion: Once you have concluded your research, the next most important step is to present your findings. Presentation is extremely important as it is the definite medium though which your research is going to be in print for the rest of the crowd. Care should be taken to categorize your thoughts well and present them in a logical and neat manner. A good quality research paper format is essential because it serves to highlight your research paper and bring to light all necessary aspects of your research.

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Informal Guidelines of Research Paper Writing

Key points to remember:

- Submit all work in its final form.
- Write your paper in the form which is presented in the guidelines using the template.
- Please note the criteria peer reviewers will use for grading the final paper.

Final points:

One purpose of organizing a research paper is to let people interpret your efforts selectively. The journal requires the following sections, submitted in the order listed, with each section starting on a new page:

The introduction: This will be compiled from reference matter and reflect the design processes or outline of basis that directed you to make a study. As you carry out the process of study, the method and process section will be constructed like that. The results segment will show related statistics in nearly sequential order and direct reviewers to similar intellectual paths throughout the data that you gathered to carry out your study.

The discussion section:

This will provide understanding of the data and projections as to the implications of the results. The use of good quality references throughout the paper will give the effort trustworthiness by representing an alertness to prior workings.

Writing a research paper is not an easy job, no matter how trouble-free the actual research or concept. Practice, excellent preparation, and controlled record-keeping are the only means to make straightforward progression.

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To make a paper clear: Adhere to recommended page limits.



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- In every section of your document, use standard writing style, including articles ("a" and "the").
- Keep paying attention to the topic of the paper.
- Use paragraphs to split each significant point (excluding the abstract).
- Align the primary line of each section.
- Present your points in sound order.
- Use present tense to report well-accepted matters.
- Use past tense to describe specific results.
- Do not use familiar wording; don't address the reviewer directly. Don't use slang or superlatives.
- Avoid use of extra pictures—include only those figures essential to presenting results.

Title page:

Choose a revealing title. It should be short and include the name(s) and address(es) of all authors. It should not have acronyms or abbreviations or exceed two printed lines.

Abstract: This summary should be two hundred words or less. It should clearly and briefly explain the key findings reported in the manuscript and must have precise statistics. It should not have acronyms or abbreviations. It should be logical in itself. Do not cite references at this point.

An abstract is a brief, distinct paragraph summary of finished work or work in development. In a minute or less, a reviewer can be taught the foundation behind the study, common approaches to the problem, relevant results, and significant conclusions or new questions.

Write your summary when your paper is completed because how can you write the summary of anything which is not yet written? Wealth of terminology is very essential in abstract. Use comprehensive sentences, and do not sacrifice readability for brevity; you can maintain it succinctly by phrasing sentences so that they provide more than a lone rationale. The author can at this moment go straight to shortening the outcome. Sum up the study with the subsequent elements in any summary. Try to limit the initial two items to no more than one line each.

Reason for writing the article—theory, overall issue, purpose.

- Fundamental goal.
- To-the-point depiction of the research.
- Consequences, including definite statistics—if the consequences are quantitative in nature, account for this; results of any numerical analysis should be reported. Significant conclusions or questions that emerge from the research.

Approach:

- Single section and succinct.
- An outline of the job done is always written in past tense.
- Concentrate on shortening results—limit background information to a verdict or two.
- Exact spelling, clarity of sentences and phrases, and appropriate reporting of quantities (proper units, important statistics) are just as significant in an abstract as they are anywhere else.

Introduction:

The introduction should "introduce" the manuscript. The reviewer should be presented with sufficient background information to be capable of comprehending and calculating the purpose of your study without having to refer to other works. The basis for the study should be offered. Give the most important references, but avoid making a comprehensive appraisal of the topic. Describe the problem visibly. If the problem is not acknowledged in a logical, reasonable way, the reviewer will give no attention to your results. Speak in common terms about techniques used to explain the problem, if needed, but do not present any particulars about the protocols here.

The following approach can create a valuable beginning:

- Explain the value (significance) of the study.
- Defend the model—why did you employ this particular system or method? What is its compensation? Remark upon its appropriateness from an abstract point of view as well as pointing out sensible reasons for using it.
- Present a justification. State your particular theory(-ies) or aim(s), and describe the logic that led you to choose them.
- Briefly explain the study's tentative purpose and how it meets the declared objectives.

Approach:

Use past tense except for when referring to recognized facts. After all, the manuscript will be submitted after the entire job is done. Sort out your thoughts; manufacture one key point for every section. If you make the four points listed above, you will need at least four paragraphs. Present surrounding information only when it is necessary to support a situation. The reviewer does not desire to read everything you know about a topic. Shape the theory specifically—do not take a broad view.

As always, give awareness to spelling, simplicity, and correctness of sentences and phrases.

Procedures (methods and materials):

This part is supposed to be the easiest to carve if you have good skills. A soundly written procedures segment allows a capable scientist to replicate your results. Present precise information about your supplies. The suppliers and clarity of reagents can be helpful bits of information. Present methods in sequential order, but linked methodologies can be grouped as a segment. Be concise when relating the protocols. Attempt to give the least amount of information that would permit another capable scientist to replicate your outcome, but be cautious that vital information is integrated. The use of subheadings is suggested and ought to be synchronized with the results section.

When a technique is used that has been well-described in another section, mention the specific item describing the way, but draw the basic principle while stating the situation. The purpose is to show all particular resources and broad procedures so that another person may use some or all of the methods in one more study or referee the scientific value of your work. It is not to be a step-by-step report of the whole thing you did, nor is a methods section a set of orders.

Materials:

Materials may be reported in part of a section or else they may be recognized along with your measures.

Methods:

- Report the method and not the particulars of each process that engaged the same methodology.
- Describe the method entirely.
- To be succinct, present methods under headings dedicated to specific dealings or groups of measures.
- Simplify—detail how procedures were completed, not how they were performed on a particular day.
- If well-known procedures were used, account for the procedure by name, possibly with a reference, and that's all.

Approach:

It is embarrassing to use vigorous voice when documenting methods without using first person, which would focus the reviewer's interest on the researcher rather than the job. As a result, when writing up the methods, most authors use third person passive voice.

Use standard style in this and every other part of the paper—avoid familiar lists, and use full sentences.

What to keep away from:

- Resources and methods are not a set of information.
- Skip all descriptive information and surroundings—save it for the argument.
- Leave out information that is immaterial to a third party.



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Results:

The principle of a results segment is to present and demonstrate your conclusion. Create this part as entirely objective details of the outcome, and save all understanding for the discussion.

The page length of this segment is set by the sum and types of data to be reported. Use statistics and tables, if suitable, to present consequences most efficiently.

You must clearly differentiate material which would usually be incorporated in a study editorial from any unprocessed data or additional appendix matter that would not be available. In fact, such matters should not be submitted at all except if requested by the instructor.

Content:

- Sum up your conclusions in text and demonstrate them, if suitable, with figures and tables.
- In the manuscript, explain each of your consequences, and point the reader to remarks that are most appropriate.
- Present a background, such as by describing the question that was addressed by creation of an exacting study.
- Explain results of control experiments and give remarks that are not accessible in a prescribed figure or table, if appropriate.
- Examine your data, then prepare the analyzed (transformed) data in the form of a figure (graph), table, or manuscript.

What to stay away from:

- Do not discuss or infer your outcome, report surrounding information, or try to explain anything.
- Do not include raw data or intermediate calculations in a research manuscript.
- Do not present similar data more than once.
- A manuscript should complement any figures or tables, not duplicate information.
- Never confuse figures with tables—there is a difference.

Approach:

As always, use past tense when you submit your results, and put the whole thing in a reasonable order.

Put figures and tables, appropriately numbered, in order at the end of the report.

If you desire, you may place your figures and tables properly within the text of your results section.

Figures and tables:

If you put figures and tables at the end of some details, make certain that they are visibly distinguished from any attached appendix materials, such as raw facts. Whatever the position, each table must be titled, numbered one after the other, and include a heading. All figures and tables must be divided from the text.

Discussion:

The discussion is expected to be the trickiest segment to write. A lot of papers submitted to the journal are discarded based on problems with the discussion. There is no rule for how long an argument should be.

Position your understanding of the outcome visibly to lead the reviewer through your conclusions, and then finish the paper with a summing up of the implications of the study. The purpose here is to offer an understanding of your results and support all of your conclusions, using facts from your research and generally accepted information, if suitable. The implication of results should be fully described.

Infer your data in the conversation in suitable depth. This means that when you clarify an observable fact, you must explain mechanisms that may account for the observation. If your results vary from your prospect, make clear why that may have happened. If your results agree, then explain the theory that the proof supported. It is never suitable to just state that the data approved the prospect, and let it drop at that. Make a decision as to whether each premise is supported or discarded or if you cannot make a conclusion with assurance. Do not just dismiss a study or part of a study as "uncertain."



Research papers are not acknowledged if the work is imperfect. Draw what conclusions you can based upon the results that you have, and take care of the study as a finished work.

- You may propose future guidelines, such as how an experiment might be personalized to accomplish a new idea.
- Give details of all of your remarks as much as possible, focusing on mechanisms.
- Make a decision as to whether the tentative design sufficiently addressed the theory and whether or not it was correctly restricted. Try to present substitute explanations if they are sensible alternatives.
- One piece of research will not counter an overall question, so maintain the large picture in mind. Where do you go next? The best studies unlock new avenues of study. What questions remain?
- Recommendations for detailed papers will offer supplementary suggestions.

Approach:

When you refer to information, differentiate data generated by your own studies from other available information. Present work done by specific persons (including you) in past tense.

Describe generally acknowledged facts and main beliefs in present tense.

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Introduction	Containing all background details with clear goal and appropriate details, flow specification, no grammar and spelling mistake, well organized sentence and paragraph, reference cited	Unclear and confusing data, appropriate format, grammar and spelling errors with unorganized matter	Out of place depth and content, hazy format
Methods and Procedures	Clear and to the point with well arranged paragraph, precision and accuracy of facts and figures, well organized subheads	Difficult to comprehend with embarrassed text, too much explanation but completed	Incorrect and unorganized structure with hazy meaning
Result	Well organized, Clear and specific, Correct units with precision, correct data, well structuring of paragraph, no grammar and spelling mistake	Complete and embarrassed text, difficult to comprehend	Irregular format with wrong facts and figures
Discussion	Well organized, meaningful specification, sound conclusion, logical and concise explanation, highly structured paragraph reference cited	Wordy, unclear conclusion, spurious	Conclusion is not cited, unorganized, difficult to comprehend
References	Complete and correct format, well organized	Beside the point, Incomplete	Wrong format and structuring

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