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Exploration

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Solutions

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# Unveiling Caesar: A Linguistic and Cognitive Exploration in Shakespearean Plays

*Bin ZHOU*

*China Foreign Affairs University*

## ABSTRACT

Utilizing the “polysemy model” of semantic change in historical linguistics, “mapping” and “conceptual integration” of metaphor, the “classical taxonomic structure” of categorization theories in cognitive linguistics, and literary conventions of structuralist poetics, this article explores Caesar’s characterization in Shakespeare’s Julius Caesar and other plays. Through an analysis of the semantic change of “Caesar” and the characters’ varying cognition within the fictional world shaped by dialogues and character interactions, the study unveils a complex portrayal produced by the negotiation between the cultural milieu and Shakespeare’s artistic pursuit.

*Keywords:* shakespearean plays, caesar, characterization, structuralist poetics, literary competence, literary conventions, fictional world, intertextuality, historical linguistics, semantic change, polysemy model, cognitive linguistics, classical taxonomic structure, conceptual integration.

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# Unveiling Caesar: A Linguistic and Cognitive Exploration in Shakespearean Plays

Bin ZHOU

## ABSTRACT

*Utilizing the “polysemy model” of semantic change in historical linguistics, “mapping” and “conceptual integration” of metaphor, the “classical taxonomic structure” of categorization theories in cognitive linguistics, and literary conventions of structuralist poetics, this article explores Caesar’s characterization in Shakespeare’s Julius Caesar and other plays. Through an analysis of the semantic change of “Caesar” and the characters’ varying cognition within the fictional world shaped by dialogues and character interactions, the study unveils a complex portrayal produced by the negotiation between the cultural milieu and Shakespeare’s artistic pursuit. In Julius Caesar, an ambiguous yet great and unique Caesar emerges. Within two kinds of intertext, comprising characters’ discourses scattered in other plays, Caesar’s ambiguity dissipates, and his greatness and uniqueness become more pronounced. The article concludes by connecting Shakespeare’s adept manipulation of literary conventions to the nuanced portrayal of Caesar, offering a distinctive contribution to the understanding of Shakespearean characters and Shakespeare’s literary competence.*

**Keywords:** shakespearean plays, caesar, characterization, structuralist poetics, literary competence, literary conventions, fictional world, intertextuality, historical linguistics, semantic change, polysemy model, cognitive linguistics, classical taxonomic structure, conceptual integration.

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## I. INTRODUCTION

Julius Caesar is one of the most influential politicians in Western history. Among various artistic forms representing him, Shakespearean plays are the most unique. Caesar is presented in *Julius Caesar* and 15 other plays; in *Julius Caesar*, Caesar is shown in his discourses, other characters’ direct evaluative comments, and their reported evaluative comments; in 15 other plays, Caesar is presented inadvertently in the characters’ direct evaluative comments and their reported evaluative comments; in *Julius Caesar* and seven other plays, Caesar is canonized from a man to an icon; etc.

Under the influence of these textual features, Caesar, the complex politician elaborated by Shakespeare, causes the hottest debate in academia. Some praise him as a great hero (Schlegel, 1811; Bonjour, 1958) and argue that his spirit represents the tendency towards Monarchism (Ulrici, 1839; Whitaker, 1953); some debase him as a notorious dictator (Hudson, 1872; Wilson, 1948; Corti, 1993); some distinguish between Caesar, the commoner, and his powerful spirit (Dowden, 1881; Knight, 1931; Rice, 1973), the selfish and unselfish Caesar (Lowenthal, 1982; Miola, 1985; Blits, 1993), and the early and late Caesar (Kujawinska-Courtney, 1993). Three subjective factors contribute to the controversy: most critics focus only on Caesar in *Julius Caesar*, neglecting Caesar in 15 other plays; many overlook the fact that “dialogue and character interaction” (Feng & Shen, 2001: 80) are the focuses of historical play studies; almost all ignore Caesar’s canonization in *Julius Caesar* and seven other plays. So, it is these critics who make Shakespeare’s Caesar a mess rather than Shakespeare’s Caesar being a mess because the latter as a literary construct objectively exists

within Shakespearean plays. Only by overcoming these subjective defects can the researchers give Shakespeare's Caesar an impartial comment; only by unveiling the internalized literary "conventions" (Culler, 2001: 6) or "codes (13) Shakespeare uses to characterize Caesar can the researchers discover Shakespeare's extraordinary "literary competence"<sup>1</sup> (55) in characterizing literary characters.

Among Shakespeare's various literary conventions or codes, canonization and intertextuality are the pivotal ones that can eliminate Caesar's ambiguity caused by other literary conventions or codes. So, this article will focus on Caesar's canonization across *Julius Caesar* and other Shakespearean plays with the help of semantic change theory in historical linguistics. Historical linguistics "investigates the processes of language change" (Trask, 2000: 150), which involves changes "[I]n vocabulary, in pronunciation, in grammar, in meaning, and to some extent in spelling" (1994: 58). By revealing how the semantic change of "Caesar" caused by characters' cognition of Caesar functions in/across *Julius Caesar* and other Shakespearean plays to canonize Caesar, the study can not only discover Caesar's characterization in Shakespearean plays but also uncover Shakespeare's extraordinary literary competence.

## II. SEMANTIC CHANGE THEORY & CHARACTERIZATION STUDY

Semantic change is one of the main focuses of historical linguistics. It is the process "where the existing meaning  $M_1$  of a word acquires a new meaning  $M_2$ , so that the word becomes polysemous with the two senses/readings  $M_1$  and

$M_2$ " (Koch, 2016: 24), or to be more precisely, it is "not a change in meanings per se, but the addition of a meaning to the semantic system or the loss of a meaning from the semantic system while the form remains constant ... all semantic changes within a speech community involve polysemy at their beginning point or at their end point" (Wilkins, 1996: 269). For example, the old English word *witnes* only had the meaning "testimony" at the beginning; after acquired a new meaning "person giving testimony," it became a polysemy; as time went on, its form became *witness*, but the two meanings were kept. The process can be illustrated as follows:

<sup>1</sup> Inspired by linguistic studies, in which the purpose is to discover "langue/speech" from "parole/language" (De Saussure, 1983: 13), or "competence" from "performance" (Chomsky, 2015: 2), literary study is to discover literary conventions or codes governing "the production and interpretation of character, of plot structure, of thematic synthesis, of symbolic condensation, and displacement" (Culler, 2001: 129) from concrete literary works. So, "point of view" (Shen & Wang, 2010: 52), "speech presentation" (67), direct evaluative comment, reported evaluative comment, canonization, and intertextuality all function as literary conventions or codes in characterizing Shakespearean characters. A writer's "literary competence" comprises all his internalized conventions or codes.

TIME	FORM	MEANING	FEATURES
T <sub>1</sub>	F	M <sub>1</sub>	p, q, r
T <sub>2</sub>	F	M <sub>1</sub> (M <sub>2</sub> )	p, q, r (q, r, s)
T <sub>3</sub>	F	M <sub>1</sub> > M <sub>2</sub>	p, q, r > q, r, s
T <sub>4</sub>	F	M <sub>1</sub> = M <sub>2</sub>	p, q, r = q, r, s

Figure 1: Process of semantic change [an integration of figures by Wilkins (1996: 269) & Koch (2016: 25)]

In Figure 1, from T<sub>1</sub> to T<sub>4</sub>, the form is constant, but the meaning is different. At T<sub>1</sub>, the word has only one meaning M<sub>1</sub> possessing features “p, q, r.” At T<sub>2</sub>, a new meaning M<sub>2</sub> surfaces, which is not independent of M<sub>1</sub>, and possesses partial features “q, r” of M<sub>1</sub> and a new feature “s.” At T<sub>3</sub>, M<sub>2</sub> is independent of M<sub>1</sub>, and feature “s” becomes more prominent, but it has not gained the equal status of M<sub>1</sub>. At T<sub>4</sub>, M<sub>2</sub> and M<sub>1</sub> have similar statuses, possessing features “p, q, r” and “q, r, s,” respectively. Restrained by the genre of history, historical writers care more about historical “facts,” which prevents them from using imagination boldly. So, it is challenging to restore Caesar’s canonization from historical texts with historical methods. Different from historical writers, playwrights/novelists can restore some lost historical events in their works by reasonable imagination. So, literary researchers can reveal Caesar’s canonization from the literary texts with literary methods. In Shakespearean plays’ fictional world created by dialogues and character interactions on the “character and character” (Short, 1989: 149) level, “Caesar” has changed gradually from a monoseme to a polyseme, i.e., M<sub>1</sub> (“Caesar, the man”) → M<sub>1</sub> (M<sub>2</sub>) “Caesar, the man” (“the title of monarchs”) → M<sub>1</sub> > M<sub>2</sub> (“Caesar, the man” > “the title of monarchs”) → M<sub>1</sub> = M<sub>2</sub> (“Caesar, the man” = “the title of monarchs”). When “Caesar” has the meaning M<sub>1</sub>, the characters’ cognition of Caesar is complex because different characters’ attitudes towards Caesar are different in different periods. When “Caesar” means M<sub>2</sub>, their cognition of Caesar is positive because the premise for them to use M<sub>2</sub> is to accept the regime created by Caesar. On the “playwright and audience/reader” (149) level, the

characters’ cognition of Caesar is an indirect and direct way to characterize Caesar and these characters, respectively. Thus, by analyzing the semantic change of “Caesar” and exploring different characters’ cognition of “Caesar, the man” and “the title of monarchs,” this study can reveal Caesar’s characterization through the lens of semantic change theory.

This article plans to study the characterization of Caesar from the historical-cognitive linguistics perspective by using “The Arden Shakespeare Complete Works”<sup>2</sup> (Revised, 2001) and subsequently included *King Edward III* (2017) as the text. First, the process, reasons, and influences of the semantic change of “Caesar” within Shakespeare’s fictional world and Shakespeare’s characterization of Caesar in different semantic change periods of “Caesar” will be analyzed by using the integrated semantic change theory illustrated in Figure 1 and the theory of literary conventions, respectively; then, Shakespeare’s characterization of Caesar with literary conventions, especially canonization and intertextuality, will be studied; finally,

<sup>2</sup> Compared with Wadsworth Shakespeare, Riverside Shakespeare, Royal Shakespeare Company, Norton Shakespeare, Folger Shakespeare Library, etc., Arden Shakespeare has many unique advantages: first, all works are annotated by internationally renowned Shakespearean scholars, aiming at advanced readers as Shakespearean scholars, Shakespearean actors, postgraduate students in English department, etc.; second, it updates very quickly, absorbing the newest discoveries timely; third, it gives the most insightful introduction, including almost all the essential information; fourth, it provides the most detailed annotations, including spelling variances in the *First Folio*, many quartos, etc., different scholars’ textual researches, and explanations of words, phrases, clauses, and paragraphs.

Shakespearean plays' advantages in representing the historical figure Caesar will be discussed. The study of Caesar's characterization from the historical-cognitive linguistics perspective can supplement Caesar's characterization study, overcome the historical study's difficulties in reconstructing characters' mental activities and Caesar's canonization, and reveal Shakespeare's extraordinary literary competence.

### III. CAESAR IN SHAKESPEAREAN PLAYS

According to the "story time" (Chatman, 1978: 62), the semantic change of "Caesar" in Shakespeare's fictional world can be roughly divided into four periods. (1) Caesar's early and middle ages (before his defeat of Pompey's descendants). During this period, Caesar gradually comes into the center of Roman political arena; "Caesar" has only one meaning, "Caesar, the man," which is reflected in Cassius's, Antony's, and Murellus's discourses in *Julius Caesar*. (2) Caesar's late age (from his defeat of Pompey's descendants to his death). In this period, Caesar becomes the only controller of Rome, causing Brutus and the conspirators' dissatisfaction; the meaning "Caesar, the man" ("the title of monarchs") emerges from "Caesar, the man," which is reflected in Caesar's discourses in *Julius Caesar*. (3) Octavius's age (from Caesar's death to Octavius's death). In this period, at first the triumvirs (Octavius, Antony, and Lepidus) defeat Brutus and the conspirators, and then Octavius defeats Antony, becoming the only ruler of Rome; "the title of monarchs" appears in the plebeians' and Antony's discourses after Caesar's assassination in *Julius Caesar*, and in Cloten's discourses in the subsequent *Cymbeline*. Still, it doesn't gain the similar position of "Caesar, the man." (4) The age after Octavius (after Octavius's death). During this period, "Caesar, the man" becomes a household name; "the title of monarchs" gains the similar position of "Caesar, the man," which is reflected in Bassianus's discourse in *Titus Andronicus*, in Countess Salisbury's, Audley's, and Prince Edward's/the Commons' discourses in *King Edward III*, in Pistol's discourse in *King Henry IV, Part 2*, in the Host's discourse in *The Merry Wives of Windsor*, in Henry VI's discourse in *King Henry VI, Part 3*,

and in Richard III's discourse in *King Richard III* chronologically. In surfacing, spreading, and stabilizing "the title of monarchs," "Caesar, the man" exists independently and never declines.

By studying the semantic change of "Caesar" in the four periods, this article can reveal Caesar's canonization within Shakespeare's fictional world, eliminate the controversy around Caesar's characterization, and establish Caesar's status as a brilliant politician in history.

#### 3.1 Caesar's Early and Middle Ages

In Caesar's early and middle ages, i.e., before his "triumph over Pompey's blood" (*Julius Caesar*, 1.1.52<sup>3</sup>), Caesar gradually comes into the center of Roman politics. Although Shakespeare starts his narration from Caesar's late age in *Julius Caesar*, Caesar's life in his early and middle ages, which consist of four episodes chronologically, i.e., being sick in Spain, overcoming Nervii, swimming, and defeating Pompey's descendants<sup>4</sup>, can be constructed from Cassius's, Antony's, and Murellus's discourses. In (1), (2), and (3), the unshaded parts are the comments on Caesar's life in his early and middle ages. Although in Cassius's, Antony's, and Murellus's discourses, "Caesar" has only one meaning, "Caesar, the man," its features differ.

(1) **CASSIUS** But ere we could arrive the point proposed / **Caesar** cried, 'help **me**, Cassius, or **I** sink!' / I, as Aeneas, our great ancestor, / Did from the flames of Troy upon his shoulder / **The old Anchises** bear, so from the waves of Tiber / Did I the tired **Caesar**: and **this man** / Is now become a god, and Cassius is / A wretched creature and must bend his body / If Caesar carelessly but nod on him. / **He** had a fever when **he** was in Spain, / And when the fit was on **him** I did mark / How **he** did shake. 'Tis true, **this god** did shake: / **His** coward lips did from their colour

<sup>3</sup> In quoting Shakespearean plays, this article follows the international convention, i.e., act, scene, and line are arranged in order. For example, 1.1.52 means Act 1, Scene 1, and Line 52 here.

<sup>4</sup> In *The Life of Julius Caesar* (Plutarch, 1907), Caesar's life in his early and middle ages are also reflected in the four episodes. Still, Cassius's narrations differ from those of Plutarch, in which Caesar "yielded not to the disease of his body" (18) and "saved himself by swimming" when "the Egyptians made towards him with their oars" (52).

fly, / And that same eye, whose bend doth awe the world, / Did lose his lustre: I did hear him groan: / Ay, and that tongue of his that bade the Romans / Mark him and write his speeches in their books, / 'Alas,' it cried, 'give me some drink, Titinius,' / As a sick girl. (*Julius Caesar*, 1.2.110-128)

Cassius shows Caesar's mediocrity by depicting the sick Caesar's behaviors and appearance and comparing the tired Caesar with "[T]he old Anchises." In doing so, he adopts the "direct speech" (Leech & Short, 2007: 260).

"[s]hake" and "groan" are the descriptions of Caesar's actions, possessing features "weak and fragile" and "painful and brittle," respectively. "[c]oward" and "did from their colour fly" are the descriptions of Caesar's "lips": the former itself is a feature, and the latter possesses features "weak and pale." "[s]ame (coward)" and "[D]id lose his lustre" are the descriptions of Caesar's "eye": the former itself is a feature, and the latter possesses features "dull and dim." "[c]ried" is the description of Caesar's "tongue," containing features "coward and vulnerable." By first putting "shake" and "groan" into the "container"<sup>5</sup> (Lakoff, 1987: 272) of their superordinate category "Caesar's action," and "lips," "eye," and "tongue" into the container of their superordinate category "Caesar's appearance," then putting "Caesar's action" and "Caesar's appearance" into the container of their superordinate category "Caesar in illness," Cassius constructs a weak, fragile, brittle, and coward Caesar, totally on the contrary of a qualified soldier and "[A]s a sick girl." Cassius's comparison of Caesar with Aeneas's father, "[T]he old Anchises," and "a sick girl" can be well explained by "projection mapping."<sup>6</sup> "The

<sup>5</sup> Cognitive linguists regard we recognize the world by activating the schemas stored in our mind, which are based on our bodily experiences. As to the CONTAINER schema, its bodily experience is that "we experience our bodies both as containers and as things in containers (e.g., rooms) constantly," its structural elements include "interior, boundary, (and) exterior," and its basic logic is that "[E]verything is either inside a container or out of it – P or not P. If container A is in container B and X is in A, then X is in B – which is the basis for modus ponens: If all A's are B's and X is an A, then X is a B" (Lakoff, 1987: 272).

<sup>6</sup> Many linguists believe that to understand the target domain, we have to use the structure of the source domain and the corresponding vocabulary. "Projection mapping will project part of the structure of one domain (source domain)

old Anchises" and "a sick girl" are in the "source domain," possessing features "old, stupid, and foolish" and "sick, weak, and frail," respectively; Caesar is in the "target domain" (Fauconnier, 1997: 9). After mapping from the source to the target, Anchises's and the girl's features are transferred to Caesar. So, in Cassius's eyes, Caesar is just a weak, sick, stupid, and ridiculous ruler.

By adopting the direct speech, Cassius "quotes the words used verbatim" (Leech & Short, 2007: 260) by Caesar. "[h]elp me" and "give me some water" are Caesar's supplications to Cassius and Titinius, respectively. So, Caesar gives himself features "helpless and tired, and weak and sick." Because Cassius is present on both occasions, he also gives Caesar these features after judging the situations by himself.

(2) **ANTONY** You all know this mantle. I remember / The first time ever Caesar put it on. / 'Twas on a summer's evening in his tent, / That day he overcame the Nervii. (*Julius Caesar*, 3.2.168-171)

(3) **MURELLUS** And do you now strew flowers in his way, / That comes in triumph over Pompey's blood? (*Julius Caesar*, 1.1.51-52)

"[o]vercame" in Antony's discourse is the description of Caesar's military achievement, possessing features "talented and brilliant," and "triumph over Pompey's blood" in Murellus's rhetorical question is the description of Caesar's victory in the internal war, possessing feature "cruel and bloody."

Compared with the relevant parts in *The Life of Julius Caesar* (Plutarch, 1907), which is generally regarded as a significant reference of Shakespeare's *Julius Caesar* and other Roman works, and in which Caesar is brave enough to face the sickness (18), overcomes the Nervii with difficulties (22-23), is a good swimmer (52), and defeats Pompey's descendants for his safety (57-58), Cassius's, Murellus's, and Antony's comments on Caesar, and Caesar's self-presentation in Cassius's discourses are all changed to some extent for their purposes. Debasing Caesar with all means, Cassius wants

onto another (target domain)" (Fauconnier, 1997: 9).

Brutus to join in the conspiracy; soliciting Cassius and Titinius, Caesar wants to save his own life; showing to the plebeians Caesar's cruelty, Murellus wants to use them to curb Caesar; highlighting Caesar's military achievements, Antony wants the plebeians to revenge for Caesar. Which Caesar is closer to history is not essential here, not only because "[A] distinction between 'fact' and 'fiction' ... seems unlikely to get us very far ... our own opposition between 'historical' and 'artistic' truth does not apply at all to ..." (Eagleton, 1996: 1) historical narratives/narrated histories, but also the purpose here is to study Caesar's characterization by focusing on the meaning of "Caesar" and its features for different characters in Caesar's early and middle ages.

By using the integrated semantic change theory illustrated in Figure 1, the meaning of "Caesar" in Caesar's early and middle ages for different characters can be summed up as follows:  $T_1$  = Caesar's early and middle ages;  $F$  = Caesar;  $M_1$  = Caesar, the man;  $F_1$  = weak and sick, stupid and ridiculous, and helpless and tired (for Cassius); vulnerable and tired, and frail and ill (for Caesar); talented and brilliant (for Antony); cruel and bloody (for Murellus). In this period, although "Caesar" has only one meaning, "Caesar, the man," the characters' evaluations of him are different. Here, the most salient literary conventions used by Shakespeare are direct evaluative comment, reported evaluative comment, "point of view"<sup>7</sup> (Prince, 2003: 75), "speech presentation"<sup>8</sup> (Leech & Short, 2007: 260), and canonization. Theoretically, Shakespeare has five types of direct evaluative comment and reported evaluative comment, i.e., entirely correct, partially correct, obscure, contradictory, and incorrect; three types of point of view, i.e., single, medium, and multiple; six types of characters' speech presentation, i.e., "free direct speech, direct speech, free indirect speech, indirect speech, narrative report of speech action, and narrative report of action" (260); and four types of Caesar's canonization, i.e., "Caesar, the

man," "Caesar, the man" ("the title of monarchs"), "Caesar, the man" > "the title of monarchs," and "Caesar, the man" = "the title of monarchs." In Caesar's early and middle ages, he chooses contradictory (Cassius's direct evaluative comments contradict those of Antony's and Murellus's), incorrect (Cassius's reported evaluative comments), multiple (the mingling of Cassius's, Caesar's, Antony's, and Murellus's points of view), direct speech (Cassius's presentation of Caesar's speech) and narrative report of action (Antony's and Murellus's presentations of Caesar's victory over the Nervii and Pompey's descendants, respectively), and "Caesar, the man," respectively. They function together to characterize Caesar as a controversial politician.

### 3.2 Caesar's Late Age

Caesar's late age extends from his "triumph over Pompey's blood" (*Julius Caesar*, 1.1.52) to his death. Caesar becomes the only powerful politician in Rome, but Brutus and the conspirators plan to overthrow his rule. Shakespeare starts his story of *Julius Caesar* here.

During this period, Caesar's contemporaries still widely use "Caesar" to refer to "Caesar, the man," but the features they give him differ from those in Caesar's early and middle ages. Here, the discourses of the three characters influencing Caesar's fate, i.e., Cassius's, Antony's, and Brutus's comments on Caesar, are chosen for analysis.

Cassius uses "god" (*Julius Caesar*, 1.2.111, 1.2.116), "lion" (*Julius Caesar*, 1.3.75, 1.3.106), "[C]olossus" (*Julius Caesar*, 1.2.132), "dreadful night" (*Julius Caesar*, 1.3.73), "strange eruptions" (*Julius Caesar*, 1.3.78), "tyrant" (*Julius Caesar*, 1.3.103), "a wolf" (*Julius Caesar*, 1.3.104), and "[S]o vile a thing" (*Julius Caesar*, 1.3.111), Antony uses "my lord" (*Julius Caesar*, 1.1.2) and "most noble" (*Julius Caesar*, 2.2.118), and Brutus uses "a serpent's egg" (*Julius Caesar*, 2.1.32), "the adder" (*Julius Caesar*, 2.1.14), and "a dish fit for the gods" (*Julius Caesar*, 2.1.161) to recognize "Caesar, the man," respectively. All these elements are in the source domain, and Caesar is in the

<sup>7</sup> Point of view is "[T]he perceptual or conceptual position in terms of which the narrated situations and events are presented" (Prince, 2003: 75).

<sup>8</sup> Speech presentation is the mode an author chooses to present character speech.

target domain. After mapping from the source to the target, Cassius, Antony, and Brutus construct “Caesar, the man” into a monster with features “holy and powerful, dreadful and dangerous, strange and destructive, despotic and dictatorial, cruel and bloody, and vile and wicked,” “respectable and noblest,” and “(potentially) dangerous and evil, and pure and sacred,” respectively.

Caesar’s contemporaries’ new attitudes towards Caesar no doubt bolster Caesar’s arrogance, which finally entails the new meaning, “the title of monarchs,” in his discourses.

(4) **CAESAR** Speak. **Caesar** is turned to hear. (*Julius Caesar*, 1.2.17)

(5) **CAESAR** Would he were fatter! But **I** fear him not: / Yet if **my name** were liable to fear / **I** do not know the man **I** should avoid / So soon as that spare Cassius ... / **I** rather tell thee what is to be feared / Than what **I** fear: for always **I** am **Caesar**. / Come on **my** right hand, for this ear is deaf, / And tell **me** truly what thou think’st of him. (*Julius Caesar*, 1.2.197-213)

(6) **CAESAR** **Caesar** shall forth. The things that threatened **me** / Ne’er looked but on **my** back: when they shall see / The face of **Caesar**, they are vanished. (*Julius Caesar*, 2.2.10-12)

(7) **CAESAR** Yet **Caesar** shall go forth, for these predictions / Are to the world in general as to **Caesar**. (*Julius Caesar*, 2.2.28-29)

(8) **CAESAR** **Caesar** should be a **beast** without a heart / If **he** should stay at home today for fear. / No, **Caesar** shall not. Danger knows full well / That **Caesar** is more dangerous than he. / We are two lions littered in one day, / And **I** the **elder and more terrible**, / And **Caesar** shall go forth. (*Julius Caesar*, 2.2.42-48)

(9) **CAESAR** Shall **Caesar** send a lie? / Have **I** in conquest stretched **mine** arm so far / To be afeard to tell greybeards the truth? / Decius, go tell them **Caesar** will not come. (*Julius Caesar*, 2.2.65-68)

(10) **CAESAR** Caius Ligarius, / **Caesar** was ne’er so much your enemy / As that same ague which hath made you lean. (*Julius Caesar*, 2.2.111-113)

(11) **CAESAR** Are we all ready? What is now amiss / That **Caesar** and **his** Senate must redress? (*Julius Caesar*, 3.1.31-32)

(12) **CAESAR** **I** must prevent thee, Cimber: / ... Be not fond / To think that **Caesar** bears such rebel blood / ... **I** mean sweet words, / Low-crooked curtsies and base spaniel fawning. / ... / **I** spurn thee like a cur out of my way. / Know, **Caesar** doth not wrong, nor without cause / Will **he** be satisfied. (*Julius Caesar*, 3.1.35-48)

(13) **CAESAR** *Et tu, Brute?* — Then fall, **Caesar**. (*Julius Caesar*, 3.1.77)

In his discourses above, except using self-referential pronouns and metaphors to refer to “Caesar, the man,” Caesar uses “Caesar” 15 times, “he” twice, and “my name” and “his” once to refer to “Caesar, the man” (“the title of monarchs”).

When Caesar uses self-referential pronouns and metaphors to refer only to “Caesar, the man,” he gives himself different features on different occasions. By using “deaf” to describe his “ear” in (5) and “prevent” and “spurn” to scold Metellus in (12), Caesar provides himself features “sick, old, and mortal,” and “just and impartial,” respectively. In other discourses, Caesar gives himself features “powerful and awful.”

When Caesar uses “Caesar,” “he,” “my name,” and “his” to refer to “Caesar, the man” (“the title of monarchs”), he gives “Caesar, the man” features “sick, old, and mortal, just and impartial, and powerful and awful.” By combining “just and impartial, and powerful and awful” with new features, “royal and imperial,” he creates “the title of monarchs” and attaches it to “Caesar, the man.” The surfacing of “the title of monarchs” in Caesar’s mind can be well explained by “conceptual integration” theory. First, a “genetic space” and two “input spaces” (Fauconnier, 1997: 149) are set up. The genetic space controls the two inputs, ensuring the elements in Input A correspond to those in Input B. The “emperor” is in Input A, and “Caesar” is in Input B, possessing features “powerful and awful, and royal and imperial,” and “sick, old, and mortal, just and impartial, and powerful and awful,” respectively. After the integration, “Caesar” in the “integrated space” (150) obtains the features of the “emperor”

and “Caesar” from Inputs A and B, respectively. Yet Caesar not only cannot escape from being sick, old, and mortal but also cannot realize the dream of being the emperor. To avoid these tortures, he unconsciously uses the psychological defense mechanism “fantasy” (Millon et al., 2004: 451) and creates two independent meanings, “Caesar, the man” and “the title of monarchs,” by giving them features “sick, old, and mortal, just and impartial, and powerful and awful” and “just and impartial, powerful and awful, and royal and imperial,” respectively, and attaches the latter to the former.

When Caesar utters (5), (6), (7), and (8), the hearers include only “the addressees” he intends to communicate with. When he utters (9) and (10), the hearers include not only the addressees but also the unintended “bystanders.” Although Caesar has no intention to communicate with the bystanders, they are in his awareness. When he utters (4), (11), (12), and (13) at the Lupercal and the Senate, the hearers include not only the addressees and the bystanders but also many “eavesdroppers” (Xia, 2012: 111), who are not in Caesar’s awareness. The plebeians are bystanders, and foreign spies and peddlers in the crowds are eavesdroppers. Most of them have never seen Caesar and can’t tell the difference between Republicanism and Monarchism. When they hear an important person surrounded and flattered by the officers use “Caesar” rather than “I” to refer to himself, they can easily connect “Caesar” to the title Monarch and regard the critical person as the present “Caesar,” i.e., the present Monarch. Assemblies at the Lupercal and the Senate are beneficial to spreading “the title of monarchs” in Rome; the touring spies and peddlers can spread it to farther places.

When Caesar utters (5), only Antony is present. Although Antony would not connect “Caesar” to “the title of monarchs,” he understands Caesar’s implication by recalling his use on other occasions. So, he can quickly respond to the plebeians’ use after Caesar’s death.

The meaning of “Caesar” in Caesar’s late age for different characters can be summed up as follows:  $T_2$  = Caesar’s late age; F = Caesar;  $M_1$  ( $M_2$ )=

Caesar, the man (the title of monarchs);  $F_1$  ( $F_2$ ) = holy and mighty, dreadful and dangerous, strange and destructive, despotic and dictatorial, cruel and bloody, and vile and wicked (for Cassius), respectable and noblest (for Antony), (potentially) dangerous and evil, and pure and sacred (for Brutus), sick, old, and mortal, just and impartial, and powerful and awful (for Caesar) [just and fair, robust and terrible, and royal and imperial (for Caesar)]. In this period, the dominant meaning of “Caesar” is still “Caesar, the man.” Still, almost all the characters’ views of him have changed from a commoner into a semi-god, which catalyzes the surfacing of “the title of monarchs” in Caesar’s discourses. Although it is still attached to “Caesar, the man,” Caesar’s use of “the title of monarchs” signals that he’s already viewed himself as an emperor and his name as a new regime. Here, the most salient literary conventions Shakespeare uses are direct evaluative comment, point of view, speech presentation, and canonization. He chooses contradictory (Cassius’s and some characters’ direct evaluative comments contradict those of Antony and others, and Brutus’s and Caesar’s direct evaluative comments themselves are contradictory, respectively, etc.), multiple (the mingling of Cassius’s, Brutus’s, Antony’s, Caesar’s, and other’s points of view), narrative report of action (Cassius’s, Brutus’s, Antony’s, Caesar’s, and other’s presentations of Caesar), and “Caesar, the man” (“the title of monarchs”), respectively. All contribute to the characterization of Caesar as an ambiguous politician.

### 3.3 Octavius’s Age

Octavius’s age is restricted to the period between Caesar’s death and Octavius’s death. Octavius first defeats Brutus and the conspirators with Antony and Lepidus, then defeats Antony, becoming the only ruler in Rome. According to the story time, the relevant plays are *Julius Caesar* (after 3.1.77), *Antony and Cleopatra*, and *Cymbeline*. During this period, many characters still widely use “Caesar” to refer to “Caesar, the man,” but the plebeians and Antony in *Julius Caesar* (after 3.1.77) and Cloten in *Cymbeline* begin to use it to refer to “the title of monarchs” independently.

When “Caesar” refers to “Caesar, the man” in the three plays, except Caesar’s or the Romans’ enemies occasionally debase him, most characters give him positive evaluative comments. Antony’s and Brutus’s comments in *Julius Caesar* (after 3.1.77), Cleopatra’s comment in *Antony and Cleopatra*, and Cymbeline’s comment in *Cymbeline* are chosen for analysis here.

Antony uses “brave hart” (*Julius Caesar*, 3.1.204), “the heart of the world” (*Julius Caesar*, 3.1.208), “a deer” (*Julius Caesar*, 3.1.209), and “a monarch” (*Julius Caesar*, 3.1.272) to recognize “Caesar, the man.” All these elements are in the source domain, and “Caesar” is in the target domain. After mapping from the source to the target, “Caesar, the man” is given features “innocent and pitiful, brave and heroic, central and dominating, and powerful and charismatic.” Brutus first debases Caesar as “the dust” (*Julius Caesar*, 3.1.116), then declares to give him “true rites and lawful ceremonies” (*Julius Caesar*, 3.1.241), and finally calls him “great Julius” and “the foremost man of all this world” (*Julius Caesar*, 4.3.22). So, his cognition of “Caesar, the man” ranges from “worthless and trivial” through “contributory and patriotic” to “great and foremost.” By using “[B]road-fronted” (*Antony and Cleopatra*, 1.5.30) and “hath mused of taking kingdoms in” (*Antony and Cleopatra*, 3.13.87) to praise Caesar, Cleopatra gives “Caesar, the man” features “clever and intelligent, and careful and considerate.” In “Caesar’s ambition, / ... did almost stretch / The sides o’ th’ world, against all colour here / Did put the yoke upon’s” (*Cymbeline*, 3.1.49-52) and “our laws, whose use the sword of Caesar / Hath too much mangled” (*Cymbeline*, 3.1.56-57), Cymbeline gives Caesar negative features “ambitious and oppressive, and destroying and destructive.” Cleopatra and Cymbeline have nothing to do with Caesar’s death. So, they can be seen as credible commentators for Caesar.

The assembly on the square after Caesar’s death is crucial for separating “the title of monarchs” from “Caesar, the man.”

(14) **3 PLEBEIAN** Let him be **Caesar**. (*Julius Caesar*, 3.2.51)

(15) **PLEBEIAN Caesar’s** better parts / Shall be crowned in Brutus. (*Julius Caesar*, 3.2.51-52)

(16) **1 PLEBEIAN This Caesar** was a tyrant.

**3 PLEBEIAN** Nay, that’s certain. / We are blest that Rome is rid of him. (*Julius Caesar*, 3.2.69-70)

(17) **ANTONY** Here was **a Caesar**: when comes **such another?** (*Julius Caesar*, 3.2.243)

In (14), (15), and (16), the plebeians use “Caesar” three times to refer to “the title of monarchs.” As the previous analysis shows, there is a close connection between the plebeians’ understanding of “Caesar” as “the title of monarchs” and Caesar’s calling of himself “Caesar” in public. Because no one corrects their faults, they now have a fixed cognition that “Caesar” is “the title of monarchs.” So, it is no surprise that they use it in this way.

Antony has heard Caesar call himself “Caesar” many times. Now, when Antony hears the plebeians use “Caesar” to refer to “the title of monarchs,” he knows the reasons. Even if he didn’t know the reasons at that moment, he would adopt this usage expediently to utilize the plebeians against Brutus and the conspirators. Antony’s use of “Caesar” in this way in (17) ensures those plebeians who are still doubtful about this usage because in their view, the dead critical person’s friend Antony will not mistake his title as “Caesar.” It should be noticed that even if the plebeians discover “Caesar” is the critical person’s name later, they continue to use it to refer to “the title of monarchs.” The plebeians’ behaviors are related to their different experiences before and after Caesar’s death. Rome is strong, glorious, wealthy, and stable with Caesar, and becomes fragmented, inglorious, poor, and unstable without Caesar. The plebeians’ continuance to use “the title of monarchs” reflects their yearnings for Caesar’s age and their appreciation for Caesar. So, in both the plebeians’ and Antony’s eyes, “the title of monarchs” possesses features “just and impartial, powerful and awful, and royal and imperial.”

The story of *Cymbeline* takes place after Octavius becomes the only ruler of Rome. In this play, even the foreigner Cloten can playfully use “Caesar” to refer to “the title of monarchs.”

(18) CLOTEN There be **many Caesars** Ere **such another / Julius**. (*Cymbeline*, 3.1.12-13)

(19) CLOTEN (as I / said) there is no moe **such Caesars**, **other of them** may / have crook'd noses, but to owe such straight arms, / none. (*Cymbeline*, 3.1.36-39)

In (18) and (19), Cloten not only uses “many Caesars” and “other of them” directly to refer to “the title of monarchs” but also in “such another / Julius” and “such Caesars” uses “Caesar, the man” as the reference point to recognize “the title of monarchs.” So, in his eyes, “Caesar, the man” possesses features “brilliant and talented,” but on the contrary, “the title of monarchs” has features “ordinary and common.” His use of “Caesar” in this way has two main reasons. First, “the title of monarchs” has already become independent in language. He is just following the “semiotic convention” (Culler, 2001: 27). Second, Lucius is now demanding England to pay tribute to Rome. By using “Caesar” in this way, he wants Lucius to know that only Julius Caesar can conquer England, and even if Octavius and others have the title “Caesar” and possess Caesar’s strong will, they lack his talents. Cloten’s playful use of “Caesar” shows that within just several decades, the two meanings have already spread to the corner of Europe, and “the title of monarchs” has been accepted by the upper class.

The meaning of “Caesar” in Octavius’s age for different characters can be summed up as follows:  $T_3 = \text{Octavius's age}$ ;  $F = \text{Caesar}$ ;  $M_1 > M_2 = \text{Caesar, the man} > \text{the title of monarchs}$ ;  $F_1 > F_2 = \text{innocent and pitiful, brave and heroic, central and dominating, and powerful and charismatic (for Antony), (at first) worthless and trivial, (then) contributory and patriotic, and (finally) tremendous and foremost (for Brutus), clever and intelligent, and careful and considerate (for Cleopatra), ambitious and oppressive, and destroying and destructive (for Cymbeline), brilliant and talented (for Cloten)} > \text{just and impartial, robust and awful, and regal and imperial (for the plebeians and Antony), ordinary and mediocre (for Cloten)}$ . In this period, “the title of monarchs” is independent of “Caesar, the man.” Still, it hasn’t gained the similar position of the latter. Except Cloten debases “the title of

monarchs” to refuse the Romans’ unreasonable demands, all the other characters give it positive evaluations. Although Brutus initially thinks “Caesar, the man” in death is powerless, all the other characters, even the Romans’ enemies, admit he is an extraordinary politician.

To represent “the title of monarchs,” here, the most salient literary conventions Shakespeare uses are direct evaluative comment, point of view, and speech presentation. Shakespeare’s choices are partially correct (Cloten’s comments are incorrect, but the plebeians’ and Antony’s remarks are correct), medium (the mingling of the plebeians’, Antony’s, and Cloten’s points of view), and narrative report of action (the plebeians’, Antony’s, and Cloten’s presentations of it), respectively. All contribute to representing “Caesar” as an icon or a new regime.

To characterize “Caesar, the man,” here, the most salient literary conventions Shakespeare uses are direct evaluative comment, point of view, speech presentation, and canonization. Shakespeare’s choices are partially correct (Brutus’s initial comment, “worthless and trivial,” and some of Caesar’s or the Roman enemies’ comments on him are incorrect, but Brutus’s other comments on him and other characters’ comments on him are correct), multiple (the mingling of Antony’s, Brutus’s, Cleopatra’s, Cymbeline’s, and other characters’ points of view), narrative report of action (Antony’s, Brutus’s, Cleopatra’s, Cymbeline’s, and other’s presentations of him), and “Caesar, the man” > “the title of monarchs,” respectively. The independence of “the title of monarchs” shows that some people now accept “Caesar” as an icon or a new regime, which indirectly proves Caesar’s greatness. So, all the chosen types of these literary conventions function to characterize Caesar as a great and influential politician.

### 3.4 Age after Octavius

The age after Octavius starts from Octavius’s death. In this period, people witness the Roman empire’s rise, division, and fall, and the rise of the Britain Empire. The relevant plays are *Titus Andronicus*, *Hamlet*, *King Edward III*, *King*

*Richard II, King Henry IV, Part 2, King Henry VI, Part 1, King Henry VI, Part 2, King Henry VI, Part 3, King Richard III, As You Like It, Measure for Measure, Othello, Love's Labour's Lost, All's Well That Ends Well, and The Merry Wives of Windsor.* During this period, "the title of monarchs" gains the similar status of "Caesar the man."

"Caesar" referring to "Caesar the man" is used in two ways:

First, it is used directly by Boyet in *Love's Labour's Lost*, by Hamlet and Horatio in *Hamlet*, by King Edward III in *King Edward III*, by King Richard II's Queen in *King Richard II*, by Suffolk and Saye in *King Henry VI, Part 2*, and by Prince Edward in *King Richard III*. King Richard II's Queen in sorrow evaluates "Caesar, the man" negatively; Hamlet evaluates him both positively and negatively; all the other characters give him positive evaluative comments. Because of the complexity of Hamlet's perspective, his evaluations of "Caesar, the man" are chosen for analysis here.

Hamlet uses "clay" (*Hamlet*, 5.1.211) and "earth" (*Hamlet*, 5.1.213) to recognize "Caesar, the man" in death, and "so capital a / calf" (*Hamlet*, 3.2.106-107), "[I]mperious" (*Hamlet*, 5.1.211), and "kept the world in awe" (*Hamlet*, 5.1.213) to recognize "Caesar, the man" alive. "[c]lay"/"earth" and "so capital a / calf" are in the source domain, possessing features "trivial and unimportant" and "very important and very strong," respectively. "Caesar, the man" in death and "Caesar, the man" alive are in the target domain. After mapping from the source to the target, "Caesar, the man" in death and "Caesar, the man" alive obtain the features of "clay" and "earth," and "so capital a / calf," respectively. By using "keep the world in awe," Hamlet also gives "Caesar, the man" alive features "fearful and powerful." So, Hamlet gives "Caesar, the man" alive and "Caesar, the man" in death positive features "imperious, essential, powerful, fearful, and powerful," and negative features "trivial and unimportant," respectively. Because Hamlet is sighing for his inability to revenge for his father's death now, these negative features given to "Caesar, the man" in death are

just the "projection"<sup>9</sup> (de Mijolla, 2005: 1334-1335) of his feelings towards himself. So, they are not his honest opinions on "Caesar, the man."

Second, it is used as a reference point for comparison by the Second Lord in *As You Like It*, by Escalus and Lucio in *Measure for Measure*, by Iago in *Othello*, by Rosalind in *All's Well That Ends Well*, by King Edward III in *King Edward III*, by Bardolph in *King Henry IV, Part 2*, by Joan and Benford in *King Henry VI, Part 1*, and by Queen Margaret in *King Henry VI, Part 3*. Rosalind evaluates "Caesar, the man" negatively, but the other characters give him positive evaluative comments. Because Benford's way of using Caesar as the reference point is different from those of the others, i.e., in "[A] far more glorious star thy soul will make / Than Julius Caesar or bright" (*King Henry VI, Part 1*, 1.1.55-56), Benford uses Caesar as the reference point to elevate Henry V, his use of Caesar as the reference point will be analyzed here.

When Benford says Henry V's star is "far more glorious ... / Than Julius Caesar," he is at Henry V's funeral. So, it is no surprise that he elevates Henry V above "Caesar, the man." Using "Caesar, the man" as the reference point, he has already given him positive features, such as "talented and brilliant, and glorious and holy."

"Caesar" referring to "the title of monarchs" is used in two kinds of discourses:

First, it is used in the direct evaluative comments by Bassianus in *Titus Andronicus*, by the Host in *The Merry Wives of Windsor*, by King Richard III in *King Richard III*, by Pistol in *King Henry IV, Part 2*, by King Henry VI in *King Henry VI, Part 3*, and by Countess Salisbury and Audley in *King Edward III*.

(20) **BASSIANUS** If ever Bassianus, **Caesar's** son, / Were gracious in the eyes of royal Rome. (*Titus Andronicus*, 1.1.10-11)

<sup>9</sup> In psychoanalysis, projection is "an intrapsychic process that creates or shapes a perception (or a collection of perceptions) with reference to an object in the outside world, which, although the subject believes he or she is perceiving it 'objectively,' is actually being perceived according to the subject's own characteristics" (de Mijolla, 2005: 1334-1335).

By calling himself “Caesar’s son” in (20), Bassianus gives “the title of monarchs” features “just and impartial, powerful and awful, and regal and imperial.”

(21) **HOST** Thou’rt an emperor- **Caesar, Kaisar** and Vizier. / ... / Said I well, bully Hector? (*The Merry Wives of Windsor*, 1.3.9-11)

The Host uses “Caesar” and its German form “Kaisar” to refer to “the title of monarchs” in (21). In both forms, he gives “the title of monarchs” features “powerful and awful, and regal and imperial.”

(22) **PISTOL** Shall pack-horses / And hollow pampere’d jades of Asia, / ... / Compare with **Caesars** and with Cannibals, / And Troyant Greeks? (*King Henry IV, Part 2*, 2.4.161-165)

Comparing “pack-horses” and “hollow pampere’d jades of Asia” with “Caesar,” “Cannibals,” and “Troyant Greeks” in (22), Pistol gives “the title of monarchs” features “talented and brilliant, powerful and awful, and royal and imperial.”

(23) **KING RICHARD III** And she shall be sole victoress, **Caesar’s Caesar**. (*King Richard III*, 4.4.336)

(24) **KING HENRY VI** No bending knee will call thee **Caesar** now. (*King Henry VI, Part 3*, 3.1.18)

By using “Caesar’s Caesar” in (23) and “Caesar” in (24) to refer to “the title of monarchs,” both King Richard III and King Henry VI give it features “powerful and awful, and royal and imperial.”

(25) **COUNTESS SALISBURY** That love you offer me you cannot give, / For **Caesar** owes that tribute to **his Queen**. (*King Edward III*, 1.2.417-418)

By saying “[F]or Caesar owes that tribute to his Queen” in (25), Countess Salisbury gives ‘the title of monarchs’ features “responsible and loyal.”

(26) **AUDLEY** Victorious Prince — that thou art so, behold / **A Caesar**’s fame in kings’ captivity. (*King Edward III*, 4.9.37-38)

Audley uses a pun in “[A] Caesar’s fame in kings’ captivity” in (26). First, “Caesar” refers to “Caesar, the man” because, after the conquest of Gaul, Caesar humiliates the King of Gaul publicly. Second, “Caesar” refers to “the title of monarchs”

because the present “Caesar” is Prince Edward’s father, Edward III. So, he gives “Caesar, the man” and “the title of monarchs” features “talented and brilliant” and “just and impartial, powerful and awful, and regal and imperial,” respectively.

Second, it is used in the reported evaluative comment by Prince Edward in *King Edward III*.

(27) **PRINCE** This tumult is of war increasing broils / As at the Coronation of **a king** / The joyful clamours of the people are, / When ‘Ave **Caesar**’ they pronounce aloud. (*King Edward III*, 1.1.161-164)

In (27), Prince Edward uses the direct speech “[A]ve Caesar” to report the Commons’ salutations to his father, King Edward III. The direct speech guarantees that he hasn’t changed the Commons’ original discourse, i.e., they use “Caesar” to refer to “the title of monarchs” and give it features “powerful and awful, and regal and imperial.” Prince Edward’s report of “[A]ve Caesar” shows that he can use “the title of monarchs” easily. In the system of language appraisal, “they pronounce” belongs to “expand” of the “engagement” (Martin & White, 2005: 133-134), i.e., it is the Commons rather than Prince Edward who gives these features to “the title of monarchs.” But because Prince Edward loves the present “Caesar,” his father, and is the legal heir to the throne, it can be inferred that he not only accepts the features given by the Commons but also endows it with other features as “just and impartial, and talented and brilliant.”

“Caesar” referring to “the title of monarchs” is used by all ranks, in its German form, in a pun, and in the reported evaluative comment shows that after many centuries’ of applying, “the title of monarchs” has already been accepted by all European languages, rooted in all Europeans’ hearts, and acquired the equal status of “Caesar, the man.”

The meaning of “Caesar” after Octavius’s age for different characters can be summed up as follows:  $T_4$  = after Octavius’s age; F = Caesar (Kaisar ...);  $(M_1 = M_2)$  = (Caesar, the man = the title of monarchs);  $(F_1 = F_2)$  = [imperious, essential, and powerful, and fearful and influential (for Hamlet); talented and brilliant, and glorious and holy (for Benford); talented and intelligent (for Audley) = just and impartial, robust and awful, and royal

and imperial (for Audley and Bassianus); terrible and awful, and royal and imperial (for the Host, the Commons, King Richard III, and King Henry VI); talented and brilliant, powerful and awful, and royal and imperial (for Pistol); responsible and loyal (for Countess Salisbury); just and impartial, talented and brilliant, powerful and awful, and royal and imperial (for Prince Edward)]. During this period, “Caesar, the man” gains the similar status of “the title of monarchs” and almost all the characters give them positive evaluations.

To represent “the title of monarchs,” here, the most salient literary conventions Shakespeare uses are direct evaluative comment, reported evaluative comment, point of view, and speech presentation. Shakespeare chooses entirely correct (Bassianus’s, the Host’s, King Richard III’s, Pistol’s, King Henry VI’s, Countess Salisbury’s, and Audley’s direct evaluative comments), entirely correct (Prince Edward’s reported evaluative comment), multiple (the mingling of Bassianus’s, the Host’s, King Richard III’s, Pistol’s, King Henry VI’s, Countess Salisbury’s, Audley’s, and Prince Edward’s/the Commons’ points of view), and narrative report of action (Bassianus’s, the Host’s, King Richard III’s, Pistol’s, King Henry VI’s, Countess Salisbury’s, and Audley’s presentations of it) and direct speech (Prince Edward’s presentation of it), respectively – All reinforce “Caesar” as a historical icon or a vital regime.

To characterize “Caesar, the man,” here, the most salient literary conventions Shakespeare uses are direct evaluative comment, point of view, speech presentation, and canonization. Shakespeare chooses partially correct (King Richard II’s Queen and Rosalind give “Caesar, the man” negative comments, Hamlet in his sadness gives him complex comments, but the other characters give him positive comments), multiple (the mingling of Boyet’s, Hamlet’s, Horatio’s, King Edward III’s, King Richard II’s Queen’s, Suffolk’s, Saye’s, Prince Edward’s, the Second Lord’s, Escalus’s, Lucio’s, Iago’s, Rosalind’s, King Edward III’s, Bardolpha’s, Joan’s, Benford’s, and Queen Margaret’s points of view), narrative report of action (Boyet’s, Hamlet’s, Horatio’s, King Edward III’s, King

Richard II’s Queen’s, Suffolk’s, Saye’s, Prince Edward’s, the Second Lord’s, Escalus’s, Lucio’s, Iago’s, Rosalind’s, King Edward III’s, Bardolpha’s, Joan’s, Benford’s, and Queen Margaret’s presentations of him), and “Caesar, the man” = “the title of monarchs,” respectively. “the title of monarchs” gains the similar status of “Caesar, the man” shows that “Caesar” as an icon or a regime has already rooted in the Europeans’ hearts, which again indirectly signals Caesar’s greatness. So, the chosen types of these literary conventions strengthen the characterization of Caesar as a great and influential politician.

### 3.5 Caesar's Characterization in Shakespearean Plays

Julius Caesar is canonized from an ordinary man into an icon by characters in different historical periods in Shakespearean plays. He is viewed as a brilliant, talented, but cruel and bloody general with a weak and sick body in his early and middle ages, which is reflected in Cassius’s (*Julius Caesar*, 1.2.110-128), Antony’s (*Julius Caesar*, 3.2.168-171), and Murellus’s (*Julius Caesar*, 1.1.51-52) discourses. Although he is weak, suffering, and old, he is viewed as a semi-god by himself and most characters in his late age, which is reflected in his (*Julius Caesar*, 1.2.17, 1.2.197-213, 2.2.10-12, 2.2.28-29, 2.2.42-48, 2.2.65-68, 2.2.111-113, 3.1.31-32, 3.1.35-48, 3.1.77), and Cassius’s (*Julius Caesar*, 1.2.111, 1.2.116, 1.3.75, 1.3.106, 1.2.132, 1.3.73, 1.3.78, 1.3.103, 1.3.104, 1.3.111), Antony’s (*Julius Caesar*, 1.1.2, 2.2.118), and Brutus’s (*Julius Caesar*, 2.1.32, 2.1.14, 2.1.161) discourses. He is not only respected and adored almost by everyone but also viewed as the title of monarchs in Octavius’s age: the former is mainly reflected in Antony’s (*Julius Caesar*, 3.1.204, 3.1.208, 3.1.209, 3.1.272), Brutus’s (*Julius Caesar*, 3.1.241, 4.3.22), Cleopatra’s (*Antony and Cleopatra*, 1.5.30, 3.13.87), and Cymbeline’s (*Cymbeline*, 3.1.49-52, 3.1.56-57) discourses; the latter is reflected in the plebeians’ (*Julius Caesar*, 3.2.51, 3.2.51-52, 3.2.69-70), Antony’s (*Julius Caesar*, 3.2.243), and Cloten’s (*Cymbeline*, 3.1.12-13, 3.1.36-39) discourses. His historical status as one of the greatest politicians in the world and the icon of the Roman imperial regime is stable after

Octavius's age: the former is reflected in Hamlet's (*Hamlet*, 3.2.106-107, 5.1.211, 5.1.213) and Benford's (*King Henry VI, Part 1*, 1.1.55-56) discourses; the latter is reflected in Bassianus's (*Titus Andronicus*, 1.1.10-11), the Host's (*The Merry Wives of Windsor*, 1.3.9-11), King Richard III's (*King Richard III*, 4.4.336), Pistol's (*King Henry IV, Part 2*, 2.4.161-165), King Henry VI's (*King Henry VI, Part 3*, 3.1.18), Countess Salisbury's (*King Edward III*, 1.2.417-418), Audley's (*King Edward III*, 4.9.37-38), and Prince Edward's/the Commons' (*King Edward III*, 1.1.161-164) discourses.

So ambiguous, so great, and so unique a Caesar is the product of the "negotiation and exchange" (Greenblatt, 1988: vii) between "the totality of the institutions, social practices, and discourses" (Abrams & Harpham, 2009: 219) and Shakespeare's artistic pursuit. When Shakespeare wrote *Julius Caesar* in 1599, he had to cater to different Londoners' different tastes to obtain commercial interests, respond to his patron Southampton's possible demand to praise the future conspirator, Essex, escape the harsh book censorship, implicitly remind the Queen to correct her faults, etc. At the same time, his artistic pursuit propelled him to create his ideal Caesar.

It is a tremendous challenge for Shakespeare's literary competence to regulate all his internalized literary conventions to produce such a Caesar. In *Julius Caesar*, Caesar is presented in Caesar's discourses, other characters' direct evaluative comments, and their reported evaluative comments. When presented in his discourses, Caesar stresses his greatness almost all the way. When presented in the direct evaluative comments and the reported evaluative comments, Caesar is given different evaluations through other characters' points of view. When presented in the reported evaluative comments, varieties of speech presentation such as direct speech, narrative report of speech acts, and free indirect speech are adopted. All these literary conventions are maneuvered to produce the effects of ambiguity and greatness. Still, the impact of uniqueness can only be made by the functioning of canonization.

Caesar's canonization takes four steps in Shakespeare's fictional world, which is reflected in the semantic change of "Caesar" as follows:  $M_1$  ("Caesar, the man")  $\rightarrow M_1 (M_2)$  ["Caesar, the man" ("the title of monarchs")]  $\rightarrow M_1 > M_2$  ("Caesar, the man"  $>$  "the title of monarchs")  $\rightarrow M_1 = M_2$  ("Caesar, the man" = "the title of monarchs").

To foreground Caesar's assassination and its aftermath, Shakespeare skillfully conceals Caesar's life in his early and middle ages in Cassius's, Antony's, and Murellus's direct evaluative comments, and in Cassius's reported evaluative comments. Canonization now takes the form  $M_1$  with different features for different characters (See the analysis in 3.1), which is beneficial to showing not only Caesar's life in his early and middle ages but also these characters' characteristics.

In Caesar's late age, although it still takes the form  $M_1$  in Cassius's discourses, it is very close to  $M_1 (M_2)$  (See the analysis in 3.2). The drastic change of Cassius's cognition of Caesar has twofold functions in characterization: first, it signals Caesar's status increases quickly; second, it shows Cassius is a man envying "a greater" (*Julius Caesar*, 1.2.208) than himself. In Caesar's discourses, it takes either the form  $M_1$  or the form  $M_1 (M_2)$ . Caesar's alternative adoption of  $M_1$  and  $M_1 (M_2)$  can successfully show his complex inner activities, i.e., the conflict between the ideal of being immortal and the reality of being mortal.

The story of the second half of *Julius Caesar* (from 3.1.78) happens in Octavius's early age.  $M_2$  becomes independent and canonization takes the form  $M_1 > M_2$  (See the analysis in 3.3). On the one hand, the wide use of  $M_1$  is beneficial to showing the other characters' renewed attitudes towards Caesar and revealing their characteristics; on the other hand, the independence of  $M_2$  signals that "Caesar" as a regime begins to be accepted by others.

The harmonious functioning of the chosen types of literary conventions, i.e., direct evaluative comment, reported evaluative comment, point of view, speech presentation, and canonization, has already helped Shakespeare successfully create an

ambiguous, great, and unique Caesar in *Julius Caesar*. Yet it is still not easy for most readers to give Caesar an impartial comment, even if they try many times.

So, only by referring to the intertexts in other Shakespearean plays can most readers have a more impartial comment on Caesar. An intertext “is a corpus of texts, textual fragments, or text-like segments of the sociolect that shares a lexicon and, to a lesser extent, a syntax with the text we are reading (directly or indirectly) in the form of synonyms, or even conversely, in the form of antonyms. In addition, each member of this corpus is a structural homologue of the text” (Riffaterre, 1984: 142). For example, Hamlet’s evaluative comment “keep the world in awe” (*Hamlet*, 5.1.213) on Caesar in *Hamlet* is the homologue of Cassius’s evaluative comments “dreadful night” (*Julius Caesar*, 1.3.73), “strange eruptions” (*Julius Caesar*, 1.3.78), etc. on Caesar in *Julius Caesar*. Both function to support each other, strengthening Caesar’s features “awful, dreadful, and terrible.” In Shakespearean plays, except in *Julius Caesar* (marked the main text), Caesar is presented in two kinds of intertext: discourses scattered in 15 other plays in which “Caesar” has the meaning “Caesar, the man” (marked Intertext A); discourses spread in seven different plays in which “Caesar” has the meaning “the title of monarchs” (marked Intertext B). The relationships between the main text and the two kinds of intertext are controlled by “intertextuality,” i.e., “the web of functions that constitutes and regulates the relationships between text and intertext” (Riffaterre, 1990: 57). Caesar’s greatness and uniqueness are much more evident in the two kinds of intertext than in *Julius Caesar*. Because Shakespeare needn’t worry about the outside pressures when he praises Caesar in the discourses scattered within these plays, the chosen types of literary conventions are relatively easy to coordinate to achieve the effects of greatness and uniqueness.

The stories of *Antony and Cleopatra* and *Cymbeline* happen in Octavius’s middle and late ages. Canonization still takes the form  $M_1 > M_2$ . Although the main literary conventions within the two kinds of intertext are still point of view, direct

evaluative comment, reported evaluative comment, and speech presentation, most of the comments on  $M_1$  are positive and the upper class has already accepted  $M_2$ . Caesar’s greatness and uniqueness are further strengthened.

After Octavius’s age, it takes the form  $M_1 = M_2$ . By adopting the same literary conventions, giving  $M_1$  positive evaluations, and using  $M_2$  freely, Shakespeare makes Caesar’s unique and outstanding status in history and the regime Caesar created become everyday facts.

To explain intertextuality’s function in characterizing Caesar, this article needs to explore the possible ways that the main text and the intertext are combined. Theoretically, intertextuality can be arranged into four types: “(main text) positive + (intertext) positive,” “(main text) ambiguous/negative + (intertext) positive,” “(main text) positive + (intertext) ambiguous/negative,” and “(main text) ambiguous/negative + (intertext) ambiguous/negative.” Because a conscientious artist such as Shakespeare always wants to convey some messages to his readers, he can’t choose “(main text) ambiguous/negative + (intertext) ambiguous/negative.” So, the other three types are the common ones in practice. “(main text) positive + (intertext) positive” is adopted by Shakespeare in his characterization of Henry V, in which both the main text (*King Henry V*) and the intertext (*King Henry VI, Part I*, *King Henry VI, Part II*, and *King Henry VI, Part III*) are positive. “(main text) positive + (intertext) ambiguous/negative” can be found in Shakespeare’s characterization of Octavius: in the main text (*Antony and Cleopatra*), Octavius is portrayed as a Machiavellian politician, but in the intertext (*Julius Caesar* and *Cymbeline*), he is either in the shadows of Caesar, Brutus, Cassius, and Antony or is described as a mediocre politician. Because the great and unique Caesar is concealed beneath the ambiguous Caesar, Shakespeare uses “(main text) ambiguous + (intertext) positive” as to the relationships between the main text (*Julius Caesar*) and Intertext A (15 other plays in which “Caesar” has the meaning “Caesar, the man”), and between the main text (*Julius Caesar*) and Intertext B (seven other plays in which “Caesar” has the meaning “the title of monarchs”).

The sharp contrast between the ambiguous Caesar in *Julius Caesar* and the incredible and unique Caesar in Intertext A and Intertext B can not only create “conflict, contradiction, and tension” (Wellek & Warren, 1942: 120) between *Julius Caesar* and the two kinds of intertext but also solve them by creating an “equilibrium” (85) between them. The main text and the two kinds of intertext are like the arch’s two sides, opposite but inescapable to each other. They are bound together by intertextuality along Caesar’s canonization, which functions as the keystone linking the arch’s two opposite sides, creating a balance between them. So, the exquisite structure between the main text and the two kinds of intertext again proves that Shakespearean works have high “literary values” (238).

Jameson (1981) argues that history is “fundamentally non-narrative and nonrepresentational” (82), “that history is not a text, not a narrative, master or otherwise, but that, as an absent cause, it is inaccessible to us except in textual form, and that our approach to it and to the Real itself necessarily passes through its prior textualization, its narrativization in the political unconscious” (35). That is to say, “[H]istory as ground and untranscendable horizon needs no particular theoretical justification” (102), and it is stored in various types of text. It can only be approached by semiotic and narrative methods. Caesar as a man did exist in history, but all about him can only be approached through all kinds of text well wrought with historical/literary/artistic conventions. Theoretically, every type of text has advantages in representing one or more aspects of Caesar. Compared with other types of text, Shakespearean plays have two advantages: first, by focusing on Caesar’s assassination in *Julius Caesar*, Shakespeare shows “eine wahrhaft historische, eine Sternstunde der Menschheit” (Zweig, 1962: 5), including the crucial moment of Caesar’s canonization, vividly in dramatic ways; second, by extending Caesar’s story, including his canonization, to other plays, Shakespeare objectively represents Caesar’s status as a great politician in history. Shakespeare’s representation of Caesar may differ from the irretrievable “Real” in some details. Still, his extraordinary talents in

revivifying the complex political conflicts, Caesar’s mentalities, other characters’ mentalities towards Caesar, and Caesar’s canonization are the most persuasive among all types of text, including historical texts. So, Shakespearean plays have their unique advantages in representing history, and the study of Caesar’s characterization from the historical-cognitive linguistics perspective has objectively proved Caesar’s greatness in history.

#### IV. CONCLUSION

Studying Caesar’s characterization along the semantic change of “Caesar,” this article discovers that “Caesar” only has the meaning “Caesar, the man” in Caesar’s early and middle ages, and “the title of monarchs” is first used by Caesar in his discourses in his late age, becomes independent in other characters’ discourses in Octavius’s age, and finally gains the equal status of “Caesar, the man” after Octavius’s age; to characterize Caesar in the four periods, Shakespeare uses many literary conventions, such as direct evaluative comment, reported evaluative comment, point of view, canonization, and intertextuality, and it is his elaborated choice of each type from each literary convention and the harmonious functioning of the chosen types that construct Caesar from an ambiguous politician into the Roman empire icon propelling history forward. Analyzing the semantic change of “Caesar” in Shakespearean plays, this article confirms Shakespeare’s positive attitude towards the historical figure Caesar. This Caesar is the product of Shakespeare’s skillful maneuvering of different literary conventions, which compose his extraordinary literary competence. Shakespeare’s complex and nuanced characters, such as Hamlet, Lear, etc., are also constructed from these literary conventions.

Compared with traditional literary studies, the study of Caesar’s characterization from the historical-cognitive linguistics perspective reveals Shakespeare’s great literary competence to maneuver literary conventions in characterizing Caesar by focusing on different characters’ cognition and evaluations of “Caesar, the man” and “the title of monarchs” along the semantic change of “Caesar,” complements historical studies’ difficulties in revealing different

characters' mental activities and reasonably revivifying the details of historical events as the critical moment of the detachment of "the title of monarchs" from "Caesar, the man" in Caesar's canonization, and provides a convenient method to study Shakespearean characters by uncovering Shakespeare's extraordinary literary competence, its major components, i.e., the literary conventions, each literary convention's possible types, and the harmonious functioning of the chosen types. So, the investigation of literary conventions and their functioning mechanisms should and will be the key to uncover the language of literature.

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# Caregiver-Infant Interaction: Effects of Gender and Prematurity Infant-Caregiver Interaction and Prematurity

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## ABSTRACT

This study analyzed the effect of caregiver's gender (mother/father) and infant's gestational age (preterm/term) on caregiver-infant interaction. Eleven mother-infant dyads and 18 father-infant dyads participated, observed for five minutes. The behaviors of the caregiver and of the infant were analyzed by Interadiade. Two-way ANOVAs showed significant differences for intrusiveness [ $F(1, 25) = 8.659$ ;  $p = 0.007$ ]. Mothers of full-term infants were more intrusive when interacting with their infant compared to fathers of full-term infants ( $p=0.004$ ) and mothers of preterm infants ( $p=0.010$ ). No effects on the infant's behaviors were found. The results suggest that families may benefit from intervention focused on the promotion of responsiveness.

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# Caregiver-Infant Interaction: Effects of Gender and Prematurity Infant-Caregiver Interaction and Prematurity

Interação Cuidador-Bebê: Efeitos do Gênero do Cuidador e da Prematuridade Interação Cuidador-Bebê e Prematuridade

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## ABSTRACT

*This study analyzed the effect of caregiver's gender (mother/father) and infant's gestational age (preterm/term) on caregiver-infant interaction. Eleven mother-infant dyads and 18 father-infant dyads participated, observed for five minutes. The behaviors of the caregiver and of the infant were analyzed by Interadiade. Two-way ANOVAs showed significant differences for intrusiveness [ $F(1, 25) = 8.659; p = 0.007$ ]. Mothers of full-term infants were more intrusive when interacting with their infant compared to fathers of full-term infants ( $p=0.004$ ) and mothers of preterm infants ( $p=0.010$ ). No effects on the infant's behaviors were found. The results suggest that families may benefit from intervention focused on the promotion of responsiveness.*

**Keywords:** mother child relations. parent child relations. premature birth.

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## RESUMO

*Este estudo analisou o efeito do gênero do cuidador (mãe/pai) e da idade gestacional do bebê (pré-termo/termo) sobre a interação cuidador-bebê. Participaram 11 díades mãe-bebê e 18 díades pai-bebê observadas durante cinco minutos. Os comportamentos do cuidador e do bebê foram analisados pelo Interadiade. ANOVAs de duas vias evidenciaram diferenças*

*significativas para o comportamento parental de intrusividade [ $F(1, 25) = 8,659; p = 0,007$ ]. Mães de bebês a termo apresentaram intrusividade por mais tempo na interação com seus filhos em comparação aos pais de bebês a termo ( $p=0,004$ ) e às mães de bebês pré-termo ( $p=0,010$ ). Não foram encontrados efeitos sobre os comportamentos do bebê. Os resultados sugerem que as famílias podem beneficiar-se de intervenção com foco na promoção de responsividade.*

**Palavras-chave:** relações mãe-criança. relações pais-criança. nascimento prematuro.

## I. INTRODUÇÃO

As interações estabelecidas entre os pais (cuidadores) e seus filhos constituem oportunidades para que eles conheçam a criança e exercitem novos comportamentos. Contribuem para a ampliação de seu repertório comportamental e desenvolvimento de habilidades para lidar com os cuidados básicos, discriminar a função do choro e atender as necessidades da criança em busca de respondê-las de forma apropriada (Alvarenga et al., 2016). Desta forma, vinculam-se ao seu filho.

A criança também aprende nas interações com sua família. Seu desenvolvimento social, cognitivo, motor e de linguagem é impactado pela maneira como as interações com os adultos significativos acontecem (Rocha et al., 2019). Durante as trocas, a criança consegue variar a forma e o contexto das suas vocalizações e movimentos influenciando a resposta parental e

estabelecendo interações sociais que facilitam o desenvolvimento da sua comunicação (Albert et al., 2017). Seus comportamentos interativos também favorecem a construção de vínculo com seus cuidadores (Izidoro et al., 2020).

Considerando esses aspectos, torna-se relevante investigar como as interações acontecem, quais comportamentos são emitidos pelos cuidadores e pelas crianças e o que controla a sua ocorrência. Entre os comportamentos parentais destaca-se a responsividade, definida por Alvarenga et al. (2016) como “respostas contingentes aos comportamentos apresentados pelo bebê, sendo que diferentes probabilidades de ocorrência estariam associadas a diferentes tipos de resposta” (p. 7). O cuidador responsivo é aquele que responde diferencialmente aos variados comportamentos da criança ou ao mesmo comportamento em contextos diferentes, atendendo adequadamente às suas necessidades.

A oferta de um cuidado responsivo é recomendada pela Organização Mundial da Saúde (WHO et al., 2018) como uma maneira de promover o desenvolvimento infantil e garantir os direitos da criança à saúde, nutrição, segurança e proteção. A responsividade pode favorecer o desenvolvimento de apego seguro com o cuidador (Becker et al., 2019), a autorregulação infantil (Zarske et al., 2021) e o desenvolvimento de habilidades motoras e cognitivas nos primeiros anos de vida de bebês nascidos pré-termo (McMahon et al., 2022, Mesquita et al., 2020). Além da responsividade, os comportamentos parentais que envolvem a estimulação da criança, incluindo o envolvimento em atividades lúdicas, comunicação e apresentação de objetos, também podem atuar como promotores do seu desenvolvimento e bem-estar com melhores índices em desenvolvimento cognitivo e socioemocional de pré-escolares (Jeong et al., 2019).

Por outro lado, comportamentos parentais intrusivos, como estimulação intensa, interrupção de atividades de regulação da criança sem respeitar a sua autonomia e excesso de diretividade na interação (Chiodelli, 2020), podem produzir contextos aversivos para a

criança (Alvarenga et al., 2016). São comportamentos não responsivos e pouco contingentes às suas respostas e necessidades. A exposição prolongada da criança a esse tipo de cuidado pode associar-se a problemas de comportamento internalizante nos primeiros anos escolares (Gueron-Sella et al., 2018).

Ao longo dos anos, diversos estudos sobre desenvolvimento infantil e interação estiveram focados no binômio mãe-bebê (Cabrera, 2019). O autor ressalta que, embora o número de estudos com pais tenha aumentado, eles ainda são menos frequentes do que os estudos com mães, o que sinaliza a necessidade de investigar as relações entre a criança e seu pai, aprender sobre o seu papel no desenvolvimento infantil e promover a corresponsabilidade paterna. Variáveis como a cultura e os papéis de gênero contribuem para a compreensão dos motivos que levaram os pais a serem negligenciados nos estudos sobre a infância (Cabrera et al., 2018).

Amodia-Bidakowska et al. (2020) realizaram uma revisão sistemática da literatura para caracterizar a interação pai-criança na primeiríssima infância (zero a 3 anos). Foram analisados 78 estudos com relação a frequência da interação, o tipo de interação e os efeitos para o desenvolvimento infantil. Sobre a frequência, as brincadeiras dos pais com seus bebês aumentaram do nascimento até o final da primeira infância (0-6 anos) e diminuíram conforme a criança cresceu e tornou-se mais envolvida com o ambiente externo à família. Esse resultado poderia sugerir o papel paterno de ativar a criança para explorar o mundo, favorecendo sua autonomia e contemplando as necessidades desenvolvimentais dela. Quanto ao tipo de brincadeira, os autores identificaram uma preferência paterna por brincadeiras que envolviam contato físico e movimento com seus filhos. Suas brincadeiras diferenciam-se das maternas, sendo os efeitos associados positivamente com a autorregulação da criança e desenvolvimento social e cognitivo. Nenhum estudo revisado pelos autores era brasileiro, o que sinaliza a escassez de estudos nacionais sobre o tema.

Investigações que considerem a variedade de comportamentos maternos e paternos na interação com seus filhos e descrevam as similaridades ou diferenças na interação de cada cuidador com a criança podem auxiliar na compreensão da parentalidade (Cabrera et al., 2018). No Brasil, Piccinini et al. (2010) realizaram um estudo com 58 díades mãe-bebê e 52 díades pai-bebê para identificar os efeitos do nível socioeconômico, suporte social percebido e o sexo do bebê sobre a interação diádica. Os participantes eram casados, pais de primeiro filho e os bebês tinham três meses de idade. Os autores destacaram entre seus achados que os cuidadores interpretaram/falaram mais com os bebês do mesmo sexo que o seu, que as díades mãe-bebê apresentaram mais os comportamentos de interpretar/falar pelo seu bebê e as díades pai-bebê o comportamento de tocar/estimular. Os bebês moveram-se mais nas interações com seus pais, quando comparados às suas mães.

Yago et al. (2014), em um estudo realizado no Japão, investigaram diferenças e semelhanças na interação de 16 crianças com suas mães e pais. As crianças tinham idade até 36 meses. Entre os resultados, não encontraram diferenças nos comportamentos de mães e pais na interação com seus filhos. Todavia, as crianças foram significativamente mais contingentes, isto é, responderam imediatamente às iniciativas de interação dos pais do que das mães.

Kokkinaki e Vasdekis (2015), na Grécia, compararam a correspondência entre as expressões faciais e a sintonização da intensidade emocional na interação de 11 bebês com suas mães e pais. Os bebês tinham idade entre dois e seis meses. As microanálises mostraram que as interações entre os pais e seus bebês foram mais lúdicas em comparação à interação das díades mãe-bebê. Os comportamentos dos bebês não diferiram em relação ao parceiro de interação.

Cerezo et al. (2017), na Espanha, investigaram a influência do gênero do cuidador e o sexo do bebê na interação de 26 díades mãe-bebê e 26 díades pai-bebê. Os bebês tinham idade entre seis e dez meses. Os dados indicaram que não houve diferença na interação com relação ao sexo do

bebê. Quanto ao gênero do cuidador, os pais se mostraram mais ativos na interação com seus bebês do que as mães, com predomínio da resposta positiva dos bebês ao comportamento interativo, mesmo que neutro. As díades mãe-bebê apresentaram frequências maiores de repetições do mesmo evento diádico, e os bebês envolveram-se em comportamentos não interativos diante de respostas neutras de suas mães.

Pereira et al. (2018), em Portugal, descreveram e compararam a qualidade observada nas interações de 183 bebês, com seus pais e com suas mães, aos dois e aos seis meses. Os resultados mostraram que, aos dois meses, as mães apresentaram frequências maiores de sensibilidade, responsividade, presença, comunicação, contentamento e se mostraram mais impositivas na interação com os bebês. Aos seis meses as diferenças permaneceram para responsividade, comunicação, contentamento, atividade e relaxamento. Não houve diferença nos comportamentos dos bebês durante interação com suas mães e pais nas duas idades analisadas. Com relação à qualidade geral da interação, aos seis meses a interação mãe-bebê apresentou mais satisfação mútua em comparação à interação pai-bebê. As autoras discutiram que as mães discriminaram melhor os comportamentos do filho, incluindo reações faciais e corporais fazendo com que respondessem de forma mais adequada às respostas da criança. Elas concluíram que isso também teria uma implicação cultural, dos papéis sociais divergentes atribuídos a cada um dos cuidadores e as expectativas sociais em relação ao seu papel na interação com o bebê.

Além do gênero do cuidador, outros fatores podem influenciar a interação dos cuidadores com seus bebês e, entre eles, a prematuridade. O nascimento pré-termo ocorre antes das 37 semanas completas de gestação e anualmente nascem aproximadamente 15 milhões de bebês pré-termo no mundo, com uma taxa de prevalência entre 5 e 18% dos nascimentos (WHO, 2022). A internação hospitalar geralmente ocorre nesses casos expondo o bebê a procedimentos dolorosos e evocando sentimentos negativos dos cuidadores decorrentes da separação do bebê e

incertezas quanto à sua sobrevivência (Almeida et al., 2020).

Rocha et al. (2019), em uma revisão sistemática da literatura, exploraram o impacto da interação mãe-bebê no desenvolvimento de bebês com até 12 meses de vida e identificaram fatores mediadores dessa relação. Entre os resultados obtidos, o nascimento pré-termo foi um dos fatores que influenciaram a interação e, conseqüentemente, o desenvolvimento do bebê, principalmente nas áreas de desenvolvimento social, cognitivo e de linguagem.

Woolard et al. (2022) encontraram que os bebês pré-termo foram menos responsivos às interações com seus cuidadores. A prematuridade também apresentou efeito para os comportamentos parentais. Cuidadores de bebês pré-termo apresentaram menos afeto e responsividade na interação com seus filhos.

Em uma meta-análise realizada por Toscano et al. (2019) com 34 estudos cujas crianças, nascidas a termo e pré-termo, tinham idade entre dois meses e nove anos, os cuidadores das crianças nascidas pré-termo apresentaram significativamente mais comportamentos de controle do que os de nascidas a termo. Esses comportamentos foram definidos como intrusividade, pressão sobre a criança para atender as demandas impostas, resolver problemas para elas e direcionar seus comportamentos.

Confirmando esses achados, Neri et al. (2017), na Itália, em um estudo com 92 bebês pré-termo aos três meses de idade corrigida, observaram que as mães se mostraram mais controladoras (comportamentos que apresentaram uma função de intrusividade) nas suas interações com seus bebês, diferindo dos pais que apresentaram significativamente mais comportamentos não responsivos. Mães (65%) e pais (60%) não diferiram quanto à sensibilidade, sendo que, durante mu8ais da metade do tempo de interação, os cuidadores apresentaram-se sensíveis. Os comportamentos dos bebês também variaram de acordo com o seu parceiro de interação sendo significativamente mais passivos na interação com os pais.

Na Holanda, Hall et al. (2015) acompanharam 231 díades mãe-bebê e pai-bebê nos dois primeiros anos de vida avaliando a influência da idade gestacional nas interações das díades um dia após o nascimento, com um mês, seis meses e 24 meses de vida dos bebês. Não foram encontradas diferenças significativas na qualidade dos comportamentos interativos parentais de bebês nascidos a termo, pré-termo moderados (32-37 semanas gestacionais) e muito pré-termo (menos do que 32 semanas). Considerando os comportamentos interativos dos bebês, os muito pré-termo apresentaram menos humor positivo quando comparados aos nascidos a termo. Os bebês pré-termo dos dois grupos apresentaram níveis baixos de atividade e atenção sustentada (na primeira avaliação), com resultados mais deficitários para os muito pré-termo. Todavia, essas diferenças desapareceram ao longo do tempo e, na última avaliação (24 meses de vida do bebê), não foram encontradas diferenças significativas entre os comportamentos dos bebês.

Observa-se uma lacuna na literatura nacional quando considerados os estudos que investigam os efeitos do gênero do cuidador e da prematuridade sobre as interações cuidador-bebê no início da vida. Ainda, os estudos internacionais são inconclusivos quanto às diferenças observadas nos comportamentos interativos maternos e paternos e sua influência sobre o comportamento interativo infantil. Variáveis culturais podem influenciar os comportamentos interativos como a centralização dos cuidados da criança como responsabilidade das mães (Cabrereta et al., 2018). Estudos têm apontado para diferenças entre comportamentos maternos e paternos para com seus bebês (Amodia & Bisdakowska et al., 2020; Piccinini et al., 2010, Kokkinaki e Vaskeskis, 2015, Cerezo et al., 2017). Nestes, pais se envolveram mais em comportamentos lúdicos e de interação e as mães em comportamentos mais responsivos, atentas às necessidades dos bebês. Quanto aos comportamentos dos bebês, apenas o estudo de Yago et al. (2014) encontrou bebês mais responsivos aos pais do que às mães.

Quanto à prematuridade estudos têm mostrado menos comportamentos interativos positivos dos cuidadores com seus bebês nascidos pré termo

(Woolard et al., 2022), mais comportamentos intrusivos (Toscabo et al., 2019, Neri et al., 2017). Dos estudos encontrados, Hall et al. ((2015) não encontraram diferenças entre os comportamentos interativos de cuidadores e seus bebês nascidos a termo e pré termo.

Investigações conduzidas nesse momento do desenvolvimento infantil contribuem para a compreensão de como as relações pais-filhos são construídas e quais variáveis podem afetá-las, orientando intervenções pontuais pautadas na promoção do cuidado responsivo e nas necessidades e potencialidades de cada díade. Nesse contexto, o presente estudo teve como objetivo analisar o efeito do gênero do cuidador (mãe e pai) e da idade gestacional do bebê (pré-termo e a termo) sobre a interação cuidador-bebê.

Os achados possibilitam a formulação de duas hipóteses: 1) Na interação: há diferenças nas interações cuidador-bebê considerando o papel do cuidador (se pai ou mãe), com maior frequência para comportamentos de estimulação dos pais e responsividade das mães; 2) Sobre a idade gestacional: cuidadores de bebês pré-termo apresentando mais intrusividade em comparação as díades cujos bebês nasceram a termo. Entre os bebês espera-se encontrar comportamentos semelhantes independente do papel do cuidador (pai ou mãe) e da idade gestacional (a termo ou pré termo). Tais hipóteses confirmariam os achados mais recorrentes na literatura consultada.

## II. MÉTODO

### 2.1 Participantes

Participaram da pesquisa 11 díades mãe-bebê e 18 díades pai-bebê primíparas que faziam parte de: 1) um projeto de extensão de uma universidade pública que acompanhava o desenvolvimento de bebês no decorrer do primeiro ano de vida (mãe-bebê n = 6; pai-bebê n = 13) e, 2) um serviço de intervenção precoce oferecido a bebês nascidos pré-termo e suas famílias também durante o primeiro ano de vida do bebê (mãe-bebê n = 5; pai-bebê n = 5). Ambos os

serviços ocorreram em uma cidade de médio porte do estado de São Paulo, Brasil.

O estudo apresenta um delineamento transversal e a amostra foi não probabilística, de conveniência. A coleta dos dados ocorreu entre março de 2018 a fevereiro de 2020. Como critérios de inclusão, estabeleceu-se: primiparidade e ser mãe ou pai de bebês até quatro meses. Foram excluídos os pais e mães que apresentaram indicadores clínicos de saúde mental (ansiedade, estresse e depressão pós-parto) rastreados no início da participação das famílias nos projetos citados. O controle dessas variáveis ocorreu devido a estudos que sugerem que a experiência prévia de maternidade ou paternidade favorece comportamentos parentais apresentados durante interação com seus filhos (exemplo Silva et al., 2021), bem como o impacto da saúde mental para a interação com a criança e na coparentalidade (exemplo Frizzo et al., 2019, Zardinello & Koch, 2020). Considerando esses critérios, 14 mães e 5 pais foram excluídos do estudo.

A Tabela 1 apresenta os dados sociodemográficos das díades mãe-bebê e pai-bebê. Com relação às díades mãe-bebê, a média de idade dos bebês foi 3,0 meses, com idade gestacional média de 36,1 semanas, peso médio ao nascer de 2.696,5 gramas e, deles, 63,6% eram meninos. As mães tinham, em média, 29 anos, 13,9 anos de estudo e 63,6% exerciam atividade remunerada. Para os 63,6% dos bebês que nasceram pré-termo, 85,7% permaneceram internados após o nascimento. A média de dias de internação foi 3,0. Quanto à família, 81,8% pertenciam a famílias nucleares, a gravidez foi planejada para 63,6% das mães e 72,7% tiveram parto cesárea.

Os bebês das díades pai-bebê tinham, em média, 3,1 meses e nasceram com idade gestacional média de 36,5 semanas. O peso médio ao nascer dos bebês foi de 2761,5 gramas e 55,6% eram meninos. Os pais tinham, em média, 32,2 anos, estudaram 12,9 anos, todos exerciam atividade remunerada, 94,4% pertenciam a famílias nucleares, 61,1% dos pais não planejaram a gravidez da mãe do bebê e 66,7% dos bebês nasceram via parto cesárea. Para os 38,9% dos

bebês que nasceram pré-termo, 85,7% permaneceram internados em média, por 8,3 dias (Tabela 1).

Para verificar as condições de homogeneidade da amostra, utilizou-se o teste Mann-Whitney para as variáveis sociodemográficas apresentadas (idade do bebê, idade gestacional em semanas, peso ao nascer, idade do cuidador, escolaridade

do cuidador e números dias de internação do bebê) e o teste exato de Fisher para as variáveis sexo do bebê, exercer atividade remunerada, tipo de parto, gravidez planejada e configuração familiar. Identificou-se apenas uma diferença entre os grupos na variável exercer atividade remunerada ( $p = 0,014$ ), indicando que mais pais exerciam atividade remunerada do que as mães.

**Tabela 1:** Características sociodemográficas dos participantes considerando a divisão de acordo com o gênero do cuidador

Características sociodemográficas	Mãe-bebê	Pai-bebê	P
	n(%)	n(%)	
Idade dos bebês <i>Média(DP)</i>	3,0(0,4)	3,1(0,3)	0,803 <sup>1</sup>
Idade gestacional Pré-termo A termo <i>Média(DP)</i>	7(63,6) 4(36,4) 36,1(1,9)	7(38,9) 11(61,1) 36,5(3,8)	0,330 <sup>1</sup>
Peso a nascer <i>Média(DP)</i>	2.696,5(509,4)	2.761,5(799,5)	0,529 <sup>1</sup>
Internação do bebê Sim Não <i>Média(DP)</i>	6(54,5) 5(45,5) 3,0(3,4)	6(33,3) 12(66,7) 8,3(20,4)	0,404 <sup>1</sup>
Sexo do bebê Feminino Masculino	4(36,4) 7(63,6)	8(44,4) 10(55,6)	0,486 <sup>2</sup>
Idade do cuidador <i>Média (DP)</i>	29(4,8)	32,2(6,8)	0,313 <sup>1</sup>
Anos de escolaridade <i>Média(DP)</i>	13,9(3,7)	12,9(2,8)	0,440 <sup>1</sup>
Atividade remunerada Sim Não	7(63,6) 4(36,4)	18(100) 0(0)	0,014 <sup>2</sup>
Configuração familiar Nuclear Outra	9(81,8) 2(18,2)	17(94,4) 1(5,6)	0,316 <sup>2</sup>
Planejamento da gravidez Sim Não	7(63,6) 4(36,4)	7(38,9) 11(61,1)	0,181 <sup>2</sup>
Via de nascimento Natural Cesárea	3(27,3) 8(72,7)	6(33,3) 12(66,7)	0,534 <sup>2</sup>

Notas. DP = desvio padrão; 1 = valor de p obtido pela comparação realizada com o teste Mann-Whitney; 2 = valor de p obtido pelo teste exato de Fisher.

### III. INSTRUMENTOS

#### 3.1 *Questionário Sociodemográfico*

Para a coleta das informações sociodemográficas, o cuidador respondeu a um questionário sobre sua idade, escolaridade, configuração familiar, número de filhos, trabalho remunerado, informações sobre a gestação do bebê, o nascimento e o pós-parto (idade gestacional, tempo de internação, via de nascimento, problemas de saúde identificados etc.).

### IV. MATERIAIS PARA OBSERVAÇÃO DA INTERAÇÃO MÃE-BEBÊ E PAI-BEBÊ

Foram disponibilizados brinquedos (um chocalho, dois bichinhos de borracha - um tigre e um porquinho, um mordedor, um móbil e um livro de banho) e o seu uso ficou a critério do cuidador. Foram utilizadas uma filmadora digital, um tripé e uma maca presente nas salas de atendimento individual de cada instituição. Também ficavam disponíveis ao cuidador um acolchoado e travesseiros para posicionar o bebê.

#### 4.1 *Protocolo Para Codificação de Comportamentos Interativos Maternos/Paternos – Interdiade (Rodrigues, Chiodelli & Pereira, 2020)*

A análise dos comportamentos interativos do cuidador e do bebê foi realizada pelo Interdiade. Esse protocolo classifica os comportamentos parentais e do bebê em interativos positivos, interativos negativos e não interativos, segundo a segunda, e analisa a duração do comportamento. A escolha por esse protocolo de observação ocorreu por ele contemplar comportamentos de cada membro da díade, considerando a sua função e facilitando o planejamento de ações posteriores. Os comportamentos interativos positivos parentais são categorizados em: apresentar brinquedo, cuidar, observar, atrair a atenção para objetos ou para si, acalmar, esperar responder, brincar sem objetos e acariciar. Os comportamentos interativos negativos incluem os comportamentos parentais de: cuidar do bebê sem sinal de desconforto ou necessidade, verbalizar negativamente, interromper a atividade sem motivo aparente ou completar a atividade por

ele, estimular o bebê produzindo desconforto para ele e contato intrusivo. Os comportamentos não interativos parentais envolvem comportamentos direcionados para o observador, ou outros pontos da sala (para a porta, por exemplo). Quanto aos comportamentos do bebê, os interativos positivos envolveram os comportamentos de: interagir com brinquedo que a mãe/pai oferece, atrair a atenção da mãe/pai, olhar para mãe/pai e responder positivamente à mãe/pai, com sorrisos e vocalizações. Os comportamentos classificados como interativos negativos contemplam o choro, chutar/empurrar a mãe/pai e protestar. Os não interativos envolvem comportamentos do bebê de explorar o ambiente, explorar objetos, explorar o próprio corpo e evitar contato. As definições operacionais de cada comportamento analisado encontram-se descritas em Rodrigues, Chiodelli e Pereira (2020).

#### 4.2 *Procedimento*

A pesquisa foi aprovada pelo Comitê de Ética da Universidade xxxxx (dados ocultados para leitura às cegas), conforme pareceres n. xxxxx e xxxxx (dados ocultados para leitura às cegas). Os cuidadores que aceitaram participar do estudo assinaram um Termo de Consentimento Livre e Esclarecido (TCLE) no qual constavam informações a respeito do sigilo, cuidado e responsabilidade com os dados coletados.

A coleta dos dados ocorreu de março de 2018 a outubro de 2019, em salas de atendimento individual das instituições que os participantes frequentavam equipadas com uma maca, mesa, armários e os materiais necessários para a observação da interação cuidador-bebê. Nesse período, nas duas instituições eram identificados os bebês que estavam iniciando o acompanhamento e cumpriam o critério de idade, entre três e quatro meses. Em seguida, a pesquisadora verificava na agenda de cada instituição o dia e horário do próximo atendimento do bebê para realizar o convite ao cuidador. A pesquisa foi apresentada ao cuidador, disponibilizando informações a respeito dos objetivos, procedimentos e sigilo das informações coletadas. As dúvidas foram esclarecidas e a participação foi voluntária. Aqueles que aceitaram

participar da pesquisa assinaram o TCLE e combinaram com a pesquisadora uma data e horário para a coleta dos dados.

No dia da coleta dos dados, o cuidador respondeu ao questionário sociodemográfico e a interação com seu bebê foi observada em contexto livre durante cinco minutos. Antes de iniciar a observação, a pesquisadora instruiu o cuidador a interagir com o seu bebê como estava habituado a fazer em outros contextos.

#### 4.3 Análise dos Dados

Os dados sociodemográficos dos participantes foram organizados em planilhas do Excel e analisados por estatística descritiva (frequência absoluta e relativa).

A análise da interação cuidador-bebê foi realizada pelo Interdiade. Para a codificação, os cinco minutos de interação cuidador-bebê foram divididos em 300 intervalos de um segundo. A pesquisadora assistia aos cinco minutos de interação da diade, depois codificava os comportamentos do bebê e, em seguida, do cuidador. Cada comportamento durante o segundo analisado foi codificado como uma ocorrência. Registrava-se o início do comportamento e a sua duração. Ao final, eram somadas as durações totais dos comportamentos do bebê e do cuidador. As análises foram feitas em planilhas do Excel.

Para o presente estudo foram realizadas adaptações no Interdiade para análise dos comportamentos do cuidador com a finalidade de diminuir o número de comportamentos analisados, reagrupando-os por semelhança na sua função. Os comportamentos interativos positivos do cuidador de apresentar brinquedo para o bebê, atrair a atenção do bebê para objetos ou para si e brincar sem objetos foram agrupados na classe de estimulação. Acariciar o bebê, acalmar o bebê, cuidar do bebê, esperar o bebê responder e observar o bebê foram agrupados na classe responsividade. Os comportamentos interativos negativos de contato intrusivo, cuidar do bebê excessivamente, estimular excessivamente e interromper a atividade do bebê foram agrupados na classe intrusividade. O

comportamento interativo negativo de verbalizar negativamente para o bebê foi considerado como uma classe a parte por não envolver intrusividade do cuidador, todavia, devido a duração desse comportamento ter sido baixa (média para as mães = 1,90; DP = 2,25; média para os pais = 4,73; DP = 7,51), ele não foi considerado nas análises estatísticas. O mesmo ocorreu para o comportamento não interativo de olhar para outros pontos da sala (média para as mães = 13,54; DP = 15,95; média para os pais = 11,00; DP = 7,87). As análises estatísticas do comportamento do bebê foram realizadas para os totais das classes de comportamentos interativos positivos, negativos e não interativos.

Verificou-se a fidedignidade das observações por meio de análises de dois observadores, um independente, considerando os dados de 30% da amostra. O coeficiente de correlação intraclasse foi utilizado para esta análise e os valores obtidos variaram entre 0,888 a 0,940 indicando bom índice de acordo (Cicchetti, 1994). A distribuição de normalidade dos dados foi verificada a partir da assimetria (Sk) e curtose (Ku). O critério adotado foi  $|Sk| \leq 3$  e  $|Ku| \leq 7$  (Kline, 2004).

Foram realizadas análises de variância univariadas (ANOVAs) de duas vias (gênero do cuidador e idade gestacional do bebê) e post-hoc de Sidak para verificar os efeitos significativos da interação (gênero do cuidador\*idade gestacional do bebê) sobre as variáveis dependentes investigadas (comportamentos do bebê e do cuidador). O tamanho do efeito foi calculado pelo eta quadrado parcial. As análises foram realizadas com o IBM SPSS versão 27. O nível de significância adotado foi  $p < 0,05$ .

## V. RESULTADOS

A Tabela 2 apresenta os resultados da ANOVA de duas vias para os comportamentos do cuidador. Ao considerar o gênero do cuidador, foi possível observar que os comportamentos de estimulação ocorreram com maior duração na interação tanto para as mães como para os pais. As mães estimularam mais seus bebês, ao mesmo tempo, foram mais intrusivas do que os pais. Estes, por sua vez, apresentaram mais comportamentos de

responsividade com o bebê na interação. Ao considerar as análises inferenciais, essas diferenças não foram estatisticamente significativas.

Quanto à idade gestacional, cuidadores de bebês nascidos a termo apresentaram uma duração maior de comportamentos de estimulação na interação com seus filhos, em comparação aos cuidadores de bebês nascidos pré-termo. O mesmo ocorreu com o comportamento de intrusividade. Por outro lado, cuidadores de bebês nascidos pré-termo apresentaram comportamentos responsivos por mais tempo em comparação aos cuidadores de bebês nascidos a termo. Todavia, as diferenças entre os grupos não foram estatisticamente significativas.

Não foram identificados efeitos da interação gênero do cuidador\*idade gestacional para os comportamentos de estimulação e responsividade parental. Todavia, destacam-se os resultados descritivos. Tanto as mães quanto os pais de bebês nascidos a termo estimularam seus filhos

por mais tempo em comparação aos cuidadores de bebês nascidos pré-termo. No entanto, entre o grupo de cuidadores de bebês nascidos pré-termo, as mães estimularam mais seus filhos do que os pais.

Em relação à responsividade, as mães de bebês nascidos pré-termo apresentaram por mais tempo estes comportamentos na interação com seus filhos, quando comparadas às mães de bebês nascidos a termo e aos pais. Estes, apresentaram mais responsividade na interação com seus filhos nascidos a termo.

Identificou-se efeito da interação gênero do cuidador\*idade gestacional do bebê no comportamento de intrusividade [ $F(1, 25) = 8,659$ ;  $p = 0,007$ ] com tamanho de efeito de 25,7%. Análises de post-hoc mostraram que as mães de bebês a termo emitiram significativamente por mais tempo a classe de comportamentos de intrusividade do que os pais de bebês nascidos a termo ( $p = 0,004$ ) e as mães de bebês nascidos pré-termo ( $p = 0,010$ ).

**Tabela 2:** Média, desvio padrão, valor de F e p dos comportamentos do cuidador em interação com seu bebê considerando a divisão por gênero do cuidador e idade gestacional do bebê

Comportamentos parentais	Mãe-bebê	Pai-bebê	F	p	$n_p^2$	Post-hoc
	M(DP)	M(DP)				
Gênero do cuidador						
Estimulação	167,9(53,4)	154,4(45,5)	0,803	0,379		
Intrusividade	29,9(28,1)	20,1(16,5)	3,012	0,095		
Responsividade	88,4(53,2)	100,9(47,3)	1,046	0,316		
Idade gestacional do bebê	Pré-termo	A termo				
Estimulação	154,6(57,6)	164,1(38,9)	0,643	0,430		
Intrusividade	22,3(20,8)	25,3(23,1)	2,206	0,150		
Responsividade	103,1(59,8)	89,7(37,5)	1,726	0,201		
Gênero do cuidador*idade gestacional do bebê						
Estimulação	Mãe-bebê	Pai-bebê				
Pré-termo	158,8(59,4)	150,3(60,2)	0,213	0,649		
A termo	183,7(43,9)	157,0(36,4)				
Intrusividade	Mãe-bebê	Pai-bebê	8,659	0,007	0,257	

Caregiver-Infant Interaction: Effects of Gender and Prematurity Infant-Caregiver Interaction and Prematurity

Pré-termo	17,7(20,1)	26,8(22,2)				Mãe AT>Mãe PT
A termo	51,2(29,6)	15,8(10,7)				Mãe AT>Pai AT
Responsividade	Mãe-bebê	Pai-bebê				
Pré-termo	108,6(56,2)	97,7(67,2)	2,528	0,124		
A termo	53,0(22,7)	103,0(32,9)				

Notas. M = média; DP = desvio padrão; Graus de liberdade (gl) = 1; AT = a termo; PT = pré-termo;  $\eta^2_p$  = eta quadrado parcial – tamanho do efeito para ANOVA; post-hoc de Sidak. Nível de significância  $p < 0,05$ .

A Tabela 3 apresenta os resultados para os comportamentos do bebê. As médias dos comportamentos dos bebês na interação com as mães e os pais foram semelhantes. Os comportamentos interativos positivos foram aqueles emitidos com maior duração, e por mais tempo na interação mãe-bebê. Os comportamentos interativos negativos tiveram uma duração maior na interação pai-bebê. As diferenças entre os grupos não foram estatisticamente significativas.

Com relação à idade gestacional, bebês nascidos a termo emitiriam por mais tempo comportamentos interativos positivos e negativos na interação com seu cuidador em comparação aos bebês nascidos pré-termo. Os comportamentos não interativos ocorreram por mais tempo na interação entre bebês nascidos pré-termo e seus cuidadores, em comparação à interação cuidador-bebê nascidos a

termo. As diferenças entre os grupos também não foram significativas ao considerar esta variável.

Não foram identificados efeitos da interação entre gênero do cuidador e idade gestacional para os comportamentos do bebê. Ao considerar os dados descritivos, bebês nascidos a termo emitiram por mais tempo comportamentos interativos positivos tanto na interação com as mães como com os pais. Os comportamentos interativos negativos ocorreram com maior duração na interação mãe-bebê para aqueles nascidos pré-termo, e pai-bebê para os nascidos a termo. Bebês pré-termo passaram mais tempo emitindo comportamentos não interativos na interação com os pais em comparação às mães; os bebês a termo tiveram uma duração maior destes comportamentos na interação com as mães, em comparação à interação com os pais, e com os bebês nascidos pré-termo.

**Tabela 3:** Comparações entre os comportamentos do bebê considerando a divisão de acordo com o gênero do cuidador e a idade gestacional do bebê

Comportamentos dos bebês	Mãe-bebê	Pai-bebê	F	p
	M(DP)	M(DP)		
Gênero do cuidador				
Interativos positivos	186,3(60,6)	181,2(66,5)	0,315	0,580
Interativos negativos	22,2(19,3)	27,7(42,7)	0,136	0,716
Não interativos	91,5(66,2)	91,0(64,0)	0,135	0,717
Idade gestacional do bebê	Pré-termo	A termo		
Interativos positivos	162,4(69,9)	202,5(51,3)	2,356	0,137
Interativos negativos	21,3(17,1)	29,6(46,7)	0,043	0,837
Não interativos	116,2(73,0)	67,9(44,1)	3,088	0,091

Gênero do cuidador*idade gestacional do bebê				
Interativos positivos	Mãe-bebê	Pai-bebê		
Pré-termo	181,7(58,3)	143,1(79,4)	1,042	0,317
A termo	194,2(72,7)	205,4(45,5)		
Interativos negativos	Mãe-bebê	Pai-bebê		
Pré-termo	27,4(19,9)	15,3(12,5)	1,490	0,234
A termo	13,0(16,4)	35,6(53,2)		
Não interativos	Mãe-bebê	Pai-bebê		
Pré-termo	90,8(69,1)	141,6(72,6)	3,385	0,078
A termo	92,7(71,0)	58,9(29,6)		

Notas. M = média; DP = desvio padrão; Graus de liberdade (gl) = 1

## VI. DISCUSSÃO

O presente estudo pretendeu analisar o efeito do gênero do cuidador e da idade gestacional do bebê sobre a interação cuidador-bebê avaliada por meio de comportamentos do bebê (interativo positivo, negativo e não interativo) e do cuidador (responsividade, intrusividade e estimulação). Os resultados apontaram para efeito da interação das variáveis investigadas no comportamento de intrusividade parental, isto é, as mães de bebês nascidos a termo apresentaram-se mais intrusivas na interação com seus filhos do que os pais de bebês nascidos a termo e as mães de bebês nascidos pré-termo. Ao considerar o tamanho do efeito, apenas 25,7% da variância encontrada nesse comportamento foi explicada pela interação entre as variáveis investigadas.

Considerando a intrusividade como um comportamento de controle, os dados não corroboraram as hipóteses iniciais de que a intrusividade seria mais observada em díades cujos bebês nasceram pré-termo e divergiram dos achados da meta-análise realizada por Toscano et al. (2019). No contexto da interação, a diferença entre um comportamento de estimulação e de intrusividade materna é tênue, visto que ambos podem constituir tentativas maternas de promover o desenvolvimento da criança e estimulá-la, mas as respostas do bebê a esses comportamentos é que sinalizarão para a mãe o momento em que a estimulação deve ser interrompida e a interação alterada. Uma hipótese para a diferença considerando a idade gestacional

do bebê, pode ocorrer devido as mães de bebês pré-termo geralmente receberem orientação e suporte profissional durante o período de internação de seus filhos e acompanhamento em ambulatório especializado após a alta, o que pode contribuir para a ocorrência de responsividade e promoção de vínculo entre a díade (Szewczyk et al., 2021), tornando-as menos intrusivas.

A intrusividade também foi maior em mães de bebês nascidos a termo em comparação às mães de bebês pré-termo tardios (32-36 semanas) em um estudo conduzido na Austrália por McMahon et al. (2022). Nesse estudo as crianças tinham dois anos de idade corrigida e foram encontradas relações entre os comportamentos maternos e o desenvolvimento infantil, com melhores resultados em cognição e linguagem para crianças cujas mães apresentaram médias maiores em comportamentos não intrusivos. Nesse sentido, ressalta-se a importância de oferecer intervenções que promovam o cuidado responsável de cuidadores de crianças, ainda no começo da vida, para evitar a exposição prolongada da criança a cuidados intrusivos e desfechos negativos a longo prazo no seu desenvolvimento (Gueron-Sella et al., 2018). Considerando esses efeitos, destaca-se que essas intervenções devem ser direcionadas a todos os cuidadores de crianças, independente do gênero.

Com relação a diferença na intrusividade de mães e pais de bebês nascidos a termo, esse resultado difere do encontrado por Hall et al. (2015) em que não houve diferença entre comportamentos

parentais considerando a idade gestacional da criança. No presente estudo, havia um número maior de pais cujos bebês nasceram a termo e o resultado parece indicar que os pais da amostra estudada participavam ativamente das atividades de cuidado e estimulação de seus filhos, contribuindo efetivamente para o seu desenvolvimento. Esse resultado pode sugerir uma mudança em práticas culturais relacionadas ao envolvimento paterno nas atividades de cuidado dos filhos e a corresponsabilidade de mães e pais na criação e educação de seus filhos (Menezes et al., 2019).

Essa hipótese também pode ser considerada ao analisar as similaridades entre os comportamentos de estimulação e responsividade dos cuidadores. Não houve efeito isolado da variável gênero do cuidador e da interação entre gênero do cuidador e idade gestacional para esses comportamentos, aproximando-se dos achados de Yago et al. (2014).

Backes et al. (2021) encontraram que pais que apresentaram apego seguro com seus filhos em idade pré-escolar se dedicavam mais aos cuidados básicos da criança e promoviam atividades que incentivavam os filhos a explorar o ambiente e desenvolver sua autonomia em comparação aqueles que apresentavam apego inseguro. Nesse sentido, a similaridade entre os comportamentos parentais observados no presente estudo pode se apresentar como um fator de proteção e sinalizar para a importância de promover o envolvimento paterno, o mais precoce possível, como forma de desenvolver relações de apego seguro entre a criança e seu cuidador, beneficiando o desenvolvimento da criança a longo prazo.

A experiência da parentalidade foi controlada no presente estudo e o bebê era o primeiro filho do cuidador. As similaridades observadas nos comportamentos de estimulação e responsividade parental também pode relacionar-se à essa variável. O nascimento de um filho caracteriza-se como uma mudança na trajetória de desenvolvimento do cuidador, uma vez que com a criança chegam novas responsabilidades, necessidade de desenvolver novos repertórios comportamentais, a transição para a

parentalidade e mudanças na relação conjugal (Pedroti & Frizzo, 2019). Pais e mães primíparas podem estar mais sensíveis aos comportamentos das crianças, preocupados em ter relações de qualidade com elas, engajados em aprender novos comportamentos, a discriminar suas reações e proporcionar oportunidades de aprendizagem, como já discutido em outros estudos, como Jasemi et al. (2020) e Maupin et al. (2018).

Ao analisar os comportamentos dos bebês, não foram encontrados efeitos do gênero do cuidador, corroborando os resultados apontados por Kokkinaki e Vasdekis (2015), Cerezo et al. (2017) e Pereira et al. (2018). Isso pode ocorrer devido a idade do bebê que, no momento do estudo, tinham entre três e quatro meses, e ainda estavam aprendendo a discriminar o parceiro da interação, o que possibilitaria comportar-se diferencialmente na interação com cada cuidador, diante de contingências diferenciais. Todavia, destaca-se a importância dos cuidadores (independente do gênero) para o cuidado e desenvolvimento das crianças. A ausência de diferenças na interação do bebê com seu cuidador quando considerado o gênero referenda essa questão.

Ao considerar o efeito isolado da idade gestacional, também não foram encontradas diferenças significativas nas análises realizadas tanto para os comportamentos do cuidador como do bebê, não confirmando a hipótese de que os bebês nascidos pré-termo apresentariam mais comportamentos não interativos em comparação aos bebês nascidos a termo. Foi identificada similaridade no comportamento dos cuidadores, aproximando-se do encontrado por Hall et al. (2015). Esses resultados podem sugerir que as dificuldades encontradas pelas famílias de crianças que nasceram pré-termo diminuem conforme a criança recebe alta hospitalar e os cuidadores vivenciam a rotina de cuidados com seu filho e acompanham seus progressos, tendo oportunidade de interagir com ela e aprender nessa interação.

O presente estudo apresenta limitações como o número reduzido de participantes e uma amostra de conveniência, limitando a generalização dos

resultados obtidos e sugerindo a seleção de cuidadores que já eram mais envolvidos, disponíveis para o seu bebê e preocupados com a parentalidade. Apenas 25,7% da variância observada no comportamento intrusivo parental foi explicada pela interação entre as variáveis investigadas, necessitando de novas investigações que explorem o efeito de outras variáveis no controle dos comportamentos paternos. Além disso, trata-se de um estudo descritivo e não explicativo, sendo necessário pesquisas com outros delineamentos.

Sugere-se que novos estudos insiram nas suas investigações mães e pais do mesmo bebê, com observações contínuas/sistemáticas de cada díade em diferentes sessões de observação e acompanhadas longitudinalmente, como no primeiro ano de vida da criança, o que pode auxiliar na compreensão das variáveis que afetam a interação, as investigações sobre a qualidade da mesma e possibilidades de intervenção, caso seja identificada a necessidade. Além disso, sugere-se que sejam investigados diferentes modelos de família (exemplo homoafetivas, constituídas pela adoção), e a multiparidade em comparação a primiparidade, como a identificada nesse estudo, uma vez que a experiência prévia de maternidade e paternidade também pode impactar nas relações estabelecidas com o bebê. As relações entre os comportamentos interativos dos cuidadores e o desenvolvimento infantil também se mostra relevante, principalmente quando o bebê nasceu pré-termo, visto que pode contribuir para a identificação de fatores protetivos para essa população.

Os resultados do presente estudo sugerem que cuidadores de bebês poderiam se beneficiar de programas de intervenção que os auxiliem a identificar os efeitos de seus comportamentos para os bebês, diminuindo a intrusividade, aumentando a sensibilidade às pistas emitidas pela criança e contribuindo com a promoção do desenvolvimento infantil. A oferta de intervenções universais, ou seja, oferecidas para cuidadores de crianças independente do gênero ou da presença de fatores de risco ao desenvolvimento poderia ser um caminho para atender as necessidades das

famílias, apoiando-as no exercício da sua parentalidade.

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## ABSTRACT

Agriculture land in Egypt is paramount to the nation's economy, food security, and social fabric. Egypt's rich history of agriculture, dating back to ancient civilizations along the Nile, has shaped the country's identity and sustenance for millennia. Agriculture has been the lifeblood of Egypt for thousands of years, with the fertile Nile Delta and Nile Valley serving as the cradle of Egyptian civilization. The annual inundation of the Nile River, combined with innovative irrigation techniques developed over centuries, has allowed Egypt to sustain a thriving agricultural sector.

*Keywords:* egypt, fragmentation, agricultural land holding, socio-economic challenges.

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# Socio-Economic Challenges and Proposed Solutions to Address the Fragmentation of Agricultural Land Holdings in Egypt

Jacinthe Ibrahim Rihan

## ABSTRACT

*Agriculture land in Egypt is paramount to the nation's economy, food security, and social fabric. Egypt's rich history of agriculture, dating back to ancient civilizations along the Nile, has shaped the country's identity and sustenance for millennia. Agriculture has been the lifeblood of Egypt for thousands of years, with the fertile Nile Delta and Nile Valley serving as the cradle of Egyptian civilization. The annual inundation of the Nile River, combined with innovative irrigation techniques developed over centuries, has allowed Egypt to sustain a thriving agricultural sector. Today, agricultural land in Egypt remains a cornerstone of the nation's economy, providing food, raw materials, and employment for millions. Small land holdings play a pivotal role in Egypt's agricultural landscape. These holdings are typically characterized by limited acreage, often less than two hectares, and are predominantly managed by individual families. Small-scale family farms form the backbone of Egypt's agricultural sector, contributing significantly to crop production, livestock rearing, and the livelihoods of rural communities (Muhammad,2018). Fragmented land indicates that it is divided among many legal heirs as it passes from one generation to another. Moreover, non-conducive government policies also lead to such fragmentation. It severely affects agriculture as the mechanization cannot be carried out on small fragmented land.*

*Due to this numerous adverse challenges are to be expected besides the direct loss of agricultural land due to urban settlements expansion and road network construction. Such effects are caused mainly due to the mechanisms of fragmentation; and division of large patches of agricultural land into smaller and smaller*

*patches. This leads to Smaller land patches, which means higher agricultural costs and the inability to use new agricultural techniques that favor larger patches, added to the increased water requirements, loss of biodiversity, soil erosion, and fertilizer leaching Plus the emissions from the urban settlements and the continuous traffic on the road networks, which lead to contamination of the soil and plants surrounding them (Mahmoud,2014).*

*In Egypt, small land holdings are integral to achieving food security and economic stability. They facilitate diversified crop cultivation, promote local agricultural production, and empower individuals to contribute to the nation's self-sufficiency in staple crops such as wheat, rice, and vegetables. Lastly, these small-scale farms provide a safety net for millions of Egyptians, offering a source of income and subsistence.*

*Finally, this paper discussed the Egyptian land fragmentation challenges and proposed several solutions to mitigate the socio-economic impacts in rural communities.*

**Keywords:** egypt, fragmentation, agricultural land holding, socio-economic challenges.

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## I. INTRODUCTION

Agriculture is a major component of the Egyptian economy. In 2017, agriculture, forestry, and fishery represented 11.5% of the country's GDP, with over 1,900 companies operating in the agriculture sector. The agricultural sector accounts for 28 percent of all jobs, and over 55

percent of employment in Upper Egypt is agriculture-related (USAID,2022). Egypt counts as one of the largest agricultural markets in the Middle East and North Africa (MENA) region. In 2016, the Egyptian agribusiness sector accounted for a revenue equivalent to 36 billion USD (this number includes revenues from agriculture, forestry, and fishing). Producing a wide variety of crops, the agriculture sector's horticultural products continue to hold the highest value and profitability for Egyptian farmers. Until 2010, 80% of the Egyptian agricultural export earnings came from edible fruits, nuts, peel of citrus fruits, and melons. Agriculture can be an important engine of growth and poverty reduction. However, despite its economic importance, the sector is underperforming in part because women, who are a crucial resource in agriculture and the rural economy in general, the sector employs around 45% of the women workforce in Egypt, and face specific constraints that hinder their potential productivity.

After the 1952 revolution, the government dispossessed the rich agricultural lands of large areas and donated them to poor farmers, withholding five Fedans by the Agrarian Reform Law. According to the family inheritance laws, the owners of the smallholdings divided them over the years into smaller holdings. Egypt's population is about 100 million citizens, who derive their food from the cultivation of nearly 9 million acres, which indicates the limited agricultural land available to provide food. Therefore, Egypt imports about 60% of the essential crops from abroad. The farmland share per capita is less than 0.08 acres (Seyam,1995).

The scarcity of fertile soils and water resources is one of the basic features of agriculture in Egypt, challenging the capacity to produce food and attain food security in the future. Arable lands in Egypt are scarce (Table 1) and the Farmland area covers 3.83 million ha, taking up only 3.8% of all of Egypt's land in 2017 (CAPMAS, 2019a).

**Table 1:** Agricultural land area and per capita agricultural land in Egypt during the period 2000 -2017

Year	Agricultural land Area million ha	Population millions	Per capita Agricultural land ha	Year	Agricultural land Area million ha	Population millions	Per capita Agricultural land ha
2000	3.29	69.91	0.047	2009	3.69	82.47	0.045
2001	3.34	71.23	0.047	2010	3.67	84.11	0.044
2002	3.42	72.59	0.047	2011	3.62	85.90	0.042
2003	3.41	73.98	0.046	2012	3.70	87.81	0.042
2004	3.48	75.38	0.046	2013	3.76	89.81	0.042
2005	3.52	76.78	0.046	2014	3.75	91.81	0.041
2006	3.53	78.16	0.045	2015	3.82	93.78	0.041
2007	3.54	79.54	0.044	2016	3.82	95.77	0.040
2008	3.54	80.95	0.044	2017	3.83	97.75	0.039

Source: CAPMAS,2020

Fragmented land holdings, seasonal production processes and work, and unstable earnings characterize most of Egypt's agriculture and thus leave millions of women who rely on this sector for their livelihoods impoverished. While no accurate figures exist, we can safely estimate that about 27 million females live in rural areas, based

on the national proportion of females to males, and on the percentage of the rural population in the country. From the rural poverty rate of 32 %, we can estimate that about 8 million rural women many of whom work at an age younger than 15 are poor including those who work in agriculture. The average daily wage for a seasonal farm worker in

Egypt is in the range of \$5 - \$8; it is usually lower for women compared to men (Abdelaal,2021).

The fragmentation of agricultural holdings in Egypt, and its accompanying negative effects on the agricultural sector, is one of the most prominent files affecting the future of agricultural development on the one hand, and achieving the goals of the 2030 Sustainable Economic and Social Development Plan on the other hand.

## II. THE OBJECTIVES

The main goal of the study is to propose solutions to address the socio-economic challenges related to the fragmentation of land holding in the Egyptian agriculture sector. To tackle the above goal, the following specific objectives are introduced:

- To identify the distinctive features and characteristics of fragmentation of agricultural holdings.
- To demonstrate the disadvantages and challenges of fragmentation of agricultural holdings.
- To propose methods and solutions to confront the fragmentation problem of agricultural holdings.

## III. THE METHODOLOGY

To achieve this paper's objectives information was gathered through in-depth interviews with small landholders during October 2022 and data available from the latest Agriculture Census 2009-2010. (CAPMAS,2010).

*First objective: Distinctive features and characteristics of agricultural holdings*

The phenomenon of fragmentation in Egyptian agricultural lands is not recent but rather has been rooted and renewed since the 1950s for three reasons: 1) A massive and unrestrained population increase, with relative stability in the area of agricultural land and an increase in demand for it, and 2) Islamic inheritance system that leads to the division and fragmentation of land inheritance among heirs. 3) The successive agricultural reform laws contributed to a

noticeable decline in large holdings and a concomitant increase in small holdings.

Since land represents the main production element in the agricultural production process, the aggravation and continuation of the phenomenon of fragmentation in agricultural land holdings stand in the way of achieving a sustainable agricultural renaissance because the level of return on investment in modern agriculture from an economic perspective is directly proportional to the area invested, given that this investment is based on intensification. The Use of high-cost agricultural technologies and employing agricultural digitization in implementing, leading, and managing modern farms. This modern way of agriculture, known as smart agriculture, which aims to increase agricultural production per unit area while reducing the cost of production, is impossible to be economically feasible when used in small holdings.

In general, Egypt has to work in every way to address the effects of this critical phenomenon, which has become a nightmare that threatens the future of Egyptian agriculture, especially in the ancient lands of the valley and delta, and turn this challenge into a starting point towards building an agricultural economy capable of overcoming the negative effects of fragmentation and then achieving a renaissance to modern agricultural (Ministry of Agriculture and Land Reclamation,2009).

## IV. ANALYSIS OF EGYPT'S AGRICULTURE CENSUS (2009-2010) RELATED TO THE FIRST OBJECTIVE

### 4.1 The Distinctive Features and Characteristics of Agricultural Land Holdings in Egypt

#### 4.1.1 Number and Area of Holdings

The total number of holders of agricultural lands in Egypt, whether by ownership, rent, or share, according to the results of the 2009/2010 agricultural census, was about (4.4) million holders, Table No. 2. While their numbers did not exceed (2.4) million holders in 1981/1982, that is, an increase of About 2 million holders in

twenty-eight years. The total area of agricultural holdings, according to the results of the same census, amounted to (9.7) million acres, compared to (6.6) million acres in 1981/1982. This large increase in the number of agricultural holdings reflects the continuing fragmentation of agricultural holdings. If the situation continues, agricultural holdings will become unable to meet the basic needs of a single family.

#### 4.1.2 Number of Possession Pieces

About 70% of agricultural landholders have continuous, undispersed holdings comprising a

single plot of land, occupying an area exceeding half of the agricultural land. On the other hand, the land holdings of about 30% of the holders are characterized by dispersion, as one holding is distributed over more than one piece of land separated from each other, either by land of another holding or an irrigation and drainage canal within the same village (the mother village), or other satellite villages within the administrative borders of the Rural local unit. This dispersed tenure pattern, which includes more than one plot of land per possession, includes about 45% of the total area of agricultural holdings (Table 2).

**Table 2:** Distribution of the numbers and area of agricultural land holdings according to the number of plots of land in each holding (2009/2010)

Area of holdings in thousand acres %		No. of holdings in thousand holders %		No. of plots of land holding
54.9	5343	69.5	3084	One piece (undivided possession)
27.4	2664	22.3	988	Two pieces
12.9	1252	6.7	299	Three pieces
3.3	320	1.2	55	four parts
1.5	152	0.3	14	Five pieces or more
100.0	9731	100.0	4440	Total

Source: Collected and calculated from the results of the 2009-2010 Egypt Agricultural Census, (CAPMAS,2010)

#### 4.1.3 Geographic Distribution of Holdings

The Delta governorates contain most of the agricultural holdings in Egypt, and their holders represent about 58.7% of the total holdings nationwide. They occupy an agricultural area that represents about 60.8% of the total area of the holdings. The governorates of Upper Egypt followed this and then the desert governorates,

with holdings representing 39.7% and 1.6% of the total holdings, respectively (Table 3). By comparing the numbers of holders to the area of holdings in both the Delta and Upper Egypt governorates, we can conclude how small the size of holdings is in each of the two regions, as the average size of holdings in the Delta was 0.43 acres, and in Upper Egypt, it was about 0.57 acres.

**Table 3:** Absolute and relative distribution of agricultural holdings in the Delta, Upper Egypt, and desert governorates according to the number of holdings and area (2009/2010)

Area of holdings in thousand acres %		No. of holdings in thousand holders %		Region
60.8	5917	58.7	2608	Delta governorates
31.7	3086	39.7	1763	Upper Egypt governorates
7.5	728	1.6	69	Desert governorates
100.0	9731	100.0	4440	Total

Source: Collected and calculated from the results of the 2009-2010 Egypt Agricultural Census, (CAPMAS,2010)

#### 4.1.4 Distribution of Land Holdings According to Holder's Age Groups and Size of Holding

The vast majority of Egyptian agricultural landholders are in the age group of 50 years and over, as their percentage reached 55.6% of the total holders. In contrast, the percentage of young holders (less than 30 years) did not exceed 5.2% according to the 2009/2010 Agricultural Census (Table 4). The results presented in the tables reveal a positive relationship between the number of holders by the age group of 50 and over and the increase in the size of the holding. Those holding less than one acre represented about 49.8%, and those holding seven acres and more represented about 66% of the holders in that category. As for the second age group (30-50 years), the results reveal a negative relationship between the number of holders in that age group with an increase in the size of the holding. The percentage

of holders of less than an acre is 43.7%, compared to 30.8% for holders of seven acres or more. As for the young age group (less than 30 years), a negative relationship was observed between the number of holders in that age group and the increase in the size of holdings.

In general, it can be said that in light of the previously mentioned relationships between the ages of the holders and the size of their holdings, the seriousness of the future situation can be predicted, as it is expected that more fragmentation of agricultural holdings will occur, with most holdings concentrated in the hands of the elderly, especially if we take into account that the history of the agricultural census The one conducted in 2009/2010 has passed for about eleven years, meaning that the age group of 50 years and over is at least 63 years old today.

**Table 4:** Absolute and relative distribution of the numbers of agricultural landholders per thousand acres according to age groups in years, and the size of the increase in acres

Age categories in years								The size of the holding in acres
Total %	No.	50 years and over %	No.	30-50 years %	No.	Less than 30 years %	No.	
100.0	2144	49.8	1068	43.7	936	6.5	140	Less than an acre
100.0	1069	58.3	623	37.3	399	4.4	47	1 acre and less than 2 acres
100.0	531	62.7	334	33.7	179	3.6	19	2 acres and less than 3 acres
100.0	230	64.6	149	32.0	74	3.4	8	3 acres and less than 4 acres
100.0	99	64.8	64	31.8	32	3.4	3	4 acres and less than 5 acres
100.0	170	56.8	97	39.6	68	3.5	6	5 acres and less than 7 acres
100.0	192	66.0	127	30.8	60	3.3	7	7 acres or more
100.0	4440	55.6	2462	39.4	1748	5.2	230	Total

Source: Collected and calculated from the results of the 2009-2010 Egypt Agricultural Census (CAPMAS,2010)

#### 4.1.5 Distribution of Holdings According to the Educational Level of the Holder

Most of the holders of Egyptian agricultural lands, regardless of the size of their holdings, have not

received any formal education. However, the percentage of those who can either read only or read and write among them reached about 42.6%, and the percentage of illiterate people reached

30% (Table 5). Therefore, the lack of formal education by about three-quarters of the holders simply means that they are unable to manage their holdings in a modern manner or at least follow the technical recommendations recommended by agricultural extension agencies.

**Table 5:** Absolute and relative distribution of the number of agricultural landholders per thousand acres according to educational status (in thousand holders) and size of holding (2009/2010)

Educational Status								The size of the holding in acres
Total % No.		Other* % No.		Read & write % No.		Illiterate % No.		
100.0	2144	28.5	610	41.2	883	30.3	651	Less than an acre
100.0	1069	24.8	265	42.9	459	32.3	345	1 acre and less than 2 acres
100.0	531	23.2	123	42.7	227	34.1	181	2 acres and less than 3 acres
100.0	230	23.9	55	43.7	151	32.4	75	3 acres and less than 4 acres
100.0	99	26.7	27	43.9	44	29.4	29	4 acres and less than 5 acres
100.0	170	35.6	62	43.6	74	20.8	35	5 acres and less than 7 acres
100.0	192	38.2	75	53.2	104	8.6	17	7 acres or more
100.0	4440	27.4	1217	42.6	1890	30.0	1333	Total Republic

\*Others include all educational levels: below elementary school, middle school, high school, university degree and above

Source: Collected and calculated from the results of the 2009-2010 Egypt Agricultural Census, (CAPMAS,2010).

#### 4.1.6 Distribution of Holdings According to Gender, Male-Female

The percentage of male and female holders of agricultural land reached about 96%, and 4% of the total holdings nationwide for each gender, respectively. The number of holdings less than an acre, owned by males, represents about 10.1% of the total holdings of males, and those owned by females represent about 15.7% of the total holdings owned by women.

Naturally, women's low ownership of agricultural land is logical and expected in Egypt like other developing countries for social and cultural reasons that discriminate between the sexes, especially in the ownership of agricultural land.

*Second objective: To demonstrate the disadvantages and challenges of fragmentation of agricultural holdings.*

Small land holdings have numerous challenges, including land fragmentation, limited access to resources, and the need for sustainable agricultural practices. Balancing the interests of youth and women in land ownership and management is another vital aspect of this dynamic landscape. In the modern era, Egypt is grappling with evolving agricultural practices, increased urbanization, and changing demographics. As the nation seeks to enhance the efficiency and sustainability of its agricultural sector, addressing the complexities of small land holdings becomes a central concern. Land fragmentation has a massive social impact elaborated as follows:

- *Inefficient Land Use:* Fragmented land ownership often leads to inefficient land use as small, disconnected plots are harder to cultivate and manage. This can result in lower agricultural productivity, affecting food security and the livelihoods of rural communities.
- *Rural Poverty:* Land fragmentation can contribute to rural poverty as small landholdings may not generate sufficient income to support families. This can force people to seek additional sources of income, often through seasonal or temporary employment, which can be economically unstable.
- *Limited Opportunities for Youth:* With limited arable land available, younger generations in rural areas may face difficulties securing land for farming, which can lead to a lack of economic opportunities and incentivize migration to urban areas, adding pressure on cities.
- *Social Conflict:* Land fragmentation can lead to disputes and conflicts within communities, especially when it's not clear who owns which portion of the land. These conflicts can strain social relationships and create tensions among neighbors and extended families.
- *Women's Land Rights:* In many cases, women in Egypt have limited land and property rights access. Land fragmentation can further complicate issues related to women's land ownership, Islamic inheritance, and economic empowerment.
- *Urbanization and Overcrowding:* As people migrate from rural areas due to land-related challenges, urban areas may face increased population growth, leading to overcrowding, inadequate housing, and pressure on urban infrastructure and services.
- *Socio-Environmental Impact:* Land fragmentation can also lead to environmental issues, as small, scattered plots are less conducive to sustainable land management practices. This can result in soil degradation and other environmental challenges.

## V. ANALYSIS OF EGYPT'S AGRICULTURE CENSUS (2009-2010) RELATED TO THE SECOND OBJECTIVE

The lower profitability per acre in small holdings compared to large holdings takes place due to the inability to take advantage of economies of scale to reduce production costs. The small size of the holding only allows for the cultivation of one crop in most cases, which means a certain loss if the price of this crop decreases in the markets. In large holdings, the holder can divide them into different types of crops, which reduces the possibility of loss. The prices of grain crops grown on this land are linked to international prices, as the government prices the crop according to them. Low net return per unit area for field crops compared to vegetables and fruits. For example, the net return for an acre of wheat in the 2016/2017 season was four thousand pounds, compared to 18 thousand pounds on average for the watermelon crop. Low negotiating power when dealing with merchants or intermediaries to determine the selling price of the final product.

To demonstrate the disadvantages and challenges of fragmentation of agricultural holdings can be elaborated in:

- The high percentage of losses in agricultural produce during harvesting may be due to the use of traditional manual methods or the obsolescence of harvesting machines and equipment. The product is also exposed during transportation or storage to operations that are no less important than those during harvest due to the weakness of the storage infrastructure and the primitive means of transportation used.
- The productivity of dwarf holdings is characterized by severe fluctuation from one season to another. This may be due either to unfavorable weather conditions, or to fundamental differences in the quality of seeds and seeds from year to year, which leads either to a severe unexpected decrease in production or, on the contrary, a significant increase in productivity. This would cause price shocks that affect the farmer as well as

the final consumer. As for large holdings, the situation is characterized by relative stability.

- Despite economic reform and the trend towards market economies, the state still controls the agricultural production system in the ancient lands in the valley and delta, which includes most of the fragmented small holdings, through cooperatives that are used as a tool for managing the agricultural system in Egypt, which needs revitalization and organization. On the other hand, the role of cooperatives is marginal and very limited in large holdings in new lands because they are largely independent of the government in making production and export decisions.
- Fragmentation of holdings and limited holding space lead to weak access to financing markets to obtain credit. In this regard, dwarf farmers rely mainly on the Agricultural Bank of Egypt (formerly the Agricultural Development and Credit Bank) to obtain credit, despite poor previous experience in dealing with it.
- The fragmentation of agricultural holdings contributes to the decrease in the holding area by leaving areas of land suitable for investment, such as the borders and roads that separate holdings.
- A lot of time and effort is wasted while moving from one holding to another and completing agricultural operations, which makes it impossible to use machines and equipment to their full production capacity.
- Land fragmentation destroys small investments that cannot withstand the competition of large agricultural investments.
- Fragmented agricultural holdings hamper the implementation of irrigation and drainage projects.
- Smallholdings prevent the use of modern agricultural techniques.

*Third objective: Proposed methods and solutions to confront the problem of fragmentation of agricultural holdings*

In the challenges and defects of the fragmentation of agricultural holdings in Egypt previously mentioned, and by reviewing the solutions that have been proposed, whether locally or

internationally, to confront this problem and overcome it or at least mitigate its effects, we present below a set of proposals for the most appropriate solutions that the Egyptian state should adopt or issue. Some of them are to reform the Egyptian agricultural system.

- Encouraging smallholders to adopt policies aimed at consolidating agricultural holdings within the framework of a stimulating legislative and societal environment, by planting the same crop in adjacent ponds so that various agriculture operations can be performed automatically at the same time for a single crop, which contributes to raising the efficiency of use and operation of agricultural machinery in various operations. In this regard, we can benefit from successful experiences and projects that have been previously implemented or are still being implemented Such as the field irrigation modernization project, the project to link farms to markets, the value chains project, and the experience of civil society organizations represented by the “Al-Shams Associations” that were established in 2002 in the Middle and Upper Egypt spheres voluntarily to pool the efforts of small farmers, while providing expertise—technical, administrative, and marketing in the field of non-traditional crop production. One of the advantages of agricultural aggregation is the opportunity to use agricultural digitization methods, which means electronic management of lands in terms of quantities of water used, temperatures, humidity, pesticides used...etc., through sensors and devices to record needs—the plant. Of course, using agricultural digitization would save cost, time, and effort, thus achieving higher benefits and returns per unit area.
- Encouraging the owners of agricultural lands with dwarf holdings to consolidate their agricultural holdings through voluntary consensual exchange between neighboring holdings, by granting conditional incentives such as giving priority in providing necessary agricultural services, implementing irrigation and drainage projects, etc. to areas that

initiate the implementation of tenure exchange policies. adjacent by mutual consent. To ensure the achievement of absolute justice in exchange operations, state agencies must classify these lands and submit them cadastral to determine the degrees of similarity between the various holdings to build a high level of confidence among those wishing to exchange, even if this requires determining price differences between the plots of land that are being exchanged while reducing fees and registering agricultural lands in a way that facilitates dealing with them.

- While the Islamic inheritance system plays a pivotal role in the fragmentation of agricultural holdings, and as state institutions continue to ignore addressing this dangerous phenomenon over the past decades, we recommend that Egyptian legislative institutions intervene to develop administrative processes that prevent inheritance from becoming a source of fragmentation of agricultural holdings, by enacting legislation that would The heirs shall have their legal rights, or their shares of the proceeds if exploited. Provided that this legislation takes into account the social, economic, and cultural reality prevailing in every region of the land of Egypt by applying the legal rule “no harm, no harm”.

In this regard, it is proposed to hold a community dialogue on “the negative effects of inheritance on the fragmentation of agricultural holdings,” to be adopted and discussed by the Egyptian Parliament, provided that the Ministry of Agriculture coordinates between the Agriculture and Irrigation Committee and the agricultural development partners (agricultural cooperation) Federations of farmers’ unions and other stakeholders). Societal acceptance of a proposed law permitting the restriction of agricultural ownership. It permits the restriction of agricultural ownership upon liquidation of the estate to the eldest son or one of the sons who practices agriculture as the main profession, provided that the rest of the heirs are compensated for preserving the agricultural land

that represents a national wealth from fragmentation, stunting, and collapse.

- Forming specialized companies to manage the agricultural process aiming to separate management from ownership of the land, managed by experts and specialists, so that each large agricultural basin has its own company, and the owners of this basin constitute the members of the company’s general assembly, and the company’s board of directors elected by the general assembly is responsible for preparing and equipping the basin for cultivation with crops. One, and they contract to market the product with other companies that may be internal or external, provided that the owners or their dependents have the right to participate in the agricultural process for a daily, weekly, or monthly wage, each according to his ability and experience depending on the need of the work, and by internal regulations that are prepared. Organize work.

The idea could be extended to include gathering the livestock owned by these farmers to form large barns that the company manages in the manner of livestock partnerships known among farmers.

- Promote the commercialization of small agricultural holdings, including equitable linkages between smallholders and the foreign trade sector.
- Supporting smallholders by issuing a set of incentive packages to stimulate the agricultural production process, including distributing fertilizers, supporting seeds and pesticides, leveling the land with a laser, and providing good extension services to collect fragmented holdings and exploit them in growing strategic national crops.
- Enhancing the role of agricultural cooperatives in the field of consolidating agricultural holdings by granting them greater exploitation from the various administrative authorities, developing their administrative, institutional, and financing structure, and encouraging them to establish joint-stock companies for agricultural production among farmers to achieve economies of scale and

achieve optimal independence of available resources.

- The return of the agricultural cycle more effectively and with a smart organization that takes into account all local and international economic variables, especially those crops with high economic value.

## VI. CONCLUSION

Agriculture is one of Egypt's most important sectors and a principal economic and social concern. It is not only an economic activity but also a part of the region's heritage and history, a matter of food security, a source of employment, and a significant driver of land and water use. The challenge to Egypt's agriculture is to sustainably expand agricultural production to meet escalating domestic demand for food and serve as a pathway out of poverty, particularly in rural areas. However, the agricultural sector faces many difficulties that have characterized the sector in recent years and could risk Egypt's ability and capacity to produce food in the future. These characteristics include agricultural intensification, land fragmentation and small farming systems, stagnant productivity, and increasing demand for food.

Encouraging smallholders to adopt new policies aimed at consolidating agricultural holdings within the framework of a stimulating legislative and societal environment, by planting the same crop in adjacent ponds so that various agriculture operations can be performed automatically at the same time for a single crop, which contributes to raising the efficiency of use and operation of agricultural machinery in various operations.

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# Deconstruction of Personal Subjectivity in a Totalitarian Society in the Film «Dau»

*Maria Rigel*

## ABSTRACT

This article examines the dramatic mechanisms of influence on a person's value system, leading to the destruction of personal subjectivity in a totalitarian society, symbolically depicted in the "Dau" film series. The main conflict interaction in such circumstances lies in the collision of the generally accepted system of humanistic values and totalitarian ideology.

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# Deconstruction of Personal Subjectivity in a Totalitarian Society in the Film «Dau»

Деконструкция личностной субъектности в условиях тоталитарного общества в фильме «Дау»

Maria Rigel

## ABSTRACT

*This article examines the dramatic mechanisms of influence on a person's value system, leading to the destruction of personal subjectivity in a totalitarian society, symbolically depicted in the "Dau" film series. The main conflict interaction in such circumstances lies in the collision of the generally accepted system of humanistic values and totalitarian ideology.*

**Keywords:** axiology, values, drama, manipulation, violence, totalitarianism, ideology, superman.

**Author:** (Batova Maria Andreevna) - Ph.D. in History of Arts.

## АННОТАЦИЯ

*В данной статье рассматриваются драматургические механизмы воздействия на систему ценностей человека, приводящие к разрушению личностной субъектности в условиях тоталитарного общества, символически воплощенном в серии фильмов «Дау». Основное конфликтное взаимодействие в подобных обстоятельствах заключается в столкновении общепринятой системы гуманистических ценностей и тоталитарной идеологии.*

**Ключевые слова:** аксиология, ценности, драматургия, манипуляции, насилие, тоталитаризм, идеология, сверхчеловек.

Сюжет многосерийного художественного проекта «Дау» Ильи Хржановского, состоящего из нескольких фильмов, рассказывает о жизни советского физика Льва Ландау, однако повествование ряда картин

выходит за пределы трактовки биографии центрального персонажа. Каждый из фильмов содержит отдельную сюжетную линию, отображающую жизнь работника или лица, причастного к деятельности закрытого научного института, в котором осуществляются секретные научные разработки. Подобная повествовательная структура, состоящая из разрозненных обособленных сюжетных линий, объединена одним местом действия, которое становится воплощением замкнутой тоталитарной системы, характеризующейся набором определенных специфических паттернов социальной коммуникации. Как и любое закрытое общество, институт подразумевает строгое следование иерархической принадлежности индивида и соблюдение определённых правил, нарушение которых карается строгим наказанием. Атмосфера всепоглощающего страха, порождённая жёсткой системой ограничений, утопическая идея о создании идеального общества, контроль социума с помощью неограниченного в своих проявлениях террора как на физическом, так и на психологическом уровнях<sup>1</sup>, становятся основными маркерами условного тоталитарного мира научного института, в котором разворачиваются основные события фильма. Внешние факторы воздействия на общество в свою очередь распространяются и на частную жизнь работников закрытой организации, что позволяет говорить о коллективном сознании

<sup>1</sup> Лутцев, М. В. Личность и тоталитаризм: проблема идентификации / М. В. Лутцев, М. В. Мананникова, Ю. А. Солонюк // Вестник ОГУ. — 2014. — № 11. С. 238-239

тоталитарной направленности, подвергающем деконструкции сознание отдельной личности.

Основное драматургическое взаимодействие в заданных социо-культурных обстоятельствах заключается в столкновении общепринятой системы гуманистических ценностей и идеологии, работающей во благо системы. В связи с этим возникает два вектора развития действия: система стремилась к подавлению или устранению элементов общества, которые придерживаются личных приоритетов, а не идеологических, в то время как отдельный представитель общества, на которого оказывается давление, старается в меру своих возможностей сохранить то ценностное благо, которое позволяет ему чувствовать себя полноценным. Подавление личности осуществляется разными методами, однако каждый из них подразумевает применение насилия, как психологического, так и физического, однако подобная агрессивная форма сохранения системы всегда подкрепляется стремлением к созданию идеального, благонадежного общества. «Террор как исполнение закона движения (конечная цель которого — не благо людей или интересы отдельного человека, а выдуманное человечество) уничтожает индивидов во имя рода, приносит в жертву во благо целого»<sup>2</sup>. Основные принципы воздействия на иную ценностную систему в фильмах «Дау», как правило, выражаются по принципу вербовки в диалоговых сценах и подразумевают вербальное взаимодействие персонажей.

В фильме «Дау. Новый человек» группа ученых проводит исследование с целью создания «сверхчеловека», однако цель исследования носит деструктивные цели, так как подразумевает создание человека, лишённого каких-либо предоставлений о гуманизме. Директор института проводит профилактическую беседу с участниками эксперимента, пытаясь выяснить, каких жизненных взглядов они придерживаются, чтобы определить степень их дальнейшей

эффективности. Он выстраивает разговор таким образом, что в начале даёт им возможность критиковать современное общество и указать на те недостатки, которые необходимо искоренить в людях (вредные привычки, сексуальная распущенность), с целью создания идеального социума, лишённого пороков, ведь масса людей не способна правильно распоряжаться своей свободой, что приводит к коллективной деградации. Утопические задачи носят иллюзорный характер, так как на самом деле в ходе разговора директор института, как представитель условной тоталитарной власти, выявляет потенциальных сотрудников, которые могут причислить себя к осуждающим «сверхлюдям», способным совершать насилие над «деградирующей» массой и тех, кто в полной мере не способен на тотальное насилие. Подобное деление происходит в тот момент, когда один из участников эксперимента говорит о том, что у него есть семья, и директор института имплицитно выражает сомнения относительно его кандидатуры, так как понимает, что наличие семьи существенно сказывается на его приоритетах и ценностных установках. Другой же претендент, Максим, в большей степени подходит для выполнения приказов руководства, так как семейными узами не связан и придерживается радикальных взглядов. Директор убеждает их в том, что цель (по созданию идеального общества) оправдывает любые средства, в том числе насильственные по отношению к другим людям. Данный принцип деления подразумевает методы вербовки и выявления потенциальных сотрудников, которые уже обладают необходимыми элементами личности, предрасположенной к полному подчинению. Система ценностей подобной персоны лишена по сути личностной субъектности, которая определяет её частные предпочтения и взгляды на мир, существуя лишь в рамках общепринятых системных правил, которые принимает за благо, и желая следовать идеологическим установкам для поддержания общественного порядка.

<sup>2</sup> Арндт Х. Истоки тоталитаризма / пер. с англ. — М.: ЦентрКом, 1996. С. 603

Индивидуальная система ценностей человека зачастую носит субъективный характер, но в то же время формируется под влиянием внешних социальных условий, воздействующих на мышление личности, с психоаналитической точки зрения, на уровне Сверх-Я. Суть ценностных предпочтений подразумевает устоявшиеся принципы и понятия, сулящие получение удовольствия, которое, в свою очередь, может закрывать базовые потребности человека, такие как стремление к безопасности, продолжению рода и удовлетворение физиологических потребностей, но также гностические, родственные идеологическим. Ценности человека, его наиболее значимые основы жизнепонимания можно идентифицировать в качестве двух типов знания: эмпирическое, предполагающее наличие чувственного опыта как следствие инстинкта или же ассоциативного рефлекса, и априорное, абстрактное знание, соотносимое с институциональными или же идеологическими понятиями о морали и этике. Второй тип знания позволяет человеку мыслить мир во всей его полноте и оценивать соотносимость элементов бытия, что приводит к формированию априорных ценностных ориентиров и составляет основу личности. Согласно теории немецкого философа Макса Шелера, изложенной в работе «Положение человека в космосе» (1928), именно отказ от инстинктивного влечения, продиктованного базовыми потребностями, позволяет человеку постигать высшую форму духа во всей его полноте. «Только дух в форме чистой «воли» может *деактуализировать* тот центр чувственного порыва, который мы распознали как *доступ* к действительному бытию действительного»<sup>3</sup>. Понятие духа в данном контексте соотносимо с понятием воли, как преодоления природного начала в человеке, стремящегося к постижению мира через познание физических удовольствий. Данная концепция антагонистична схожей по своим

принципам теории З. Фрейда, изложенной в работе «По ту сторону удовольствий» (1920), и утверждающей, что подавление природной энергии влечения приводит к невротическому состоянию личности, что в свою очередь блокирует ее естественное развитие<sup>4</sup>. Однако следует заметить, что формирование ценностной системы человека в период его становления осуществляется на разных уровнях психического взаимодействие с внешним миром, и таким образом образует градацию потребностей от наиболее значимых, к менее необходимым.

В фильме «Дау. Нора мама» к супруге Льва Ландау по приглашению приезжает её мать, чтобы помочь дочери разобраться с проблемами в семейных взаимоотношениях. Манера поведения матери в процессе коллективного взаимодействия остаётся в рамках общепринятых норм, однако в процессе личного общения с дочерью мать проявляет пассивную агрессию, не пытаясь скрыть свою неприязнь. Конфликтное взаимодействие выражается в диалоговых сценах, в ходе которых мать всячески манипулирует эмоциями Норы, желая вывести её из равновесия. С одной стороны, её критика в адрес чужой семейной жизни носит положительный характер, так как она, по ее мнению, желает дочери счастья и пытается давать советы, чтобы наладить ее отношения с мужем. Однако её манера построения диалога соотносима со стремлением разрушить самооценку своей дочери с целью самоутверждения и ощущения власти над её эмоциями. Она всячески апеллирует к чувству вины, указывая на недостатки Норы, говорит о том, что та не способна быть хорошей женой, что они живут в богатой квартире, но эта роскошь счастья не приносит, что Ландау не любит Нору, а лишь пользуется ею. Мать пытается завуалировать свои нападки нравоучительными наставлениями, при этом, когда дочь проявляет эмоции и впадает в истерику, она нецензурно оскорбляет её, что

<sup>3</sup> Шелер М. Положение человека в космосе // Проблема человека в западной философии / Переводы; сост. и послесл. П.С. Гуревича; общ. ред. Ю.Н. Попова. : Прогресс, 1988. С. 65.

<sup>4</sup> Фрейд З. По ту сторону принципа удовольствия // Фрейд З. Психология бессознательного. СПб.: Питер, 2002. С. 240-377.

приводит к ещё большей эмоциональной реакции. Мать всеми своими действиями пытается спровоцировать в дочери агрессию, просит даже ударить её, чтобы можно было ударить в ответ, но дочь игнорирует эту просьбу. Когда Нора поддается на психологическую манипуляцию, начинает обвинять свою мать и указывать на её недостатки, та с лёгкостью признаёт своё несовершенство, начиная ставить себя в позицию жертвы жизненных обстоятельств. Она мотивирует такое поведение неудавшейся личной жизнью и продолжает перекладывать ответственность на окружающих за свои собственные неудачи. Данное поведение в точности соответствует линии поведения агрессора в рамках теории треугольника Карпмана<sup>5</sup>, которая демонстрирует стратегию поведения человека с травмированной психикой, желающего самоутвердиться за счёт подавления другого индивида. Дочь, в свою очередь, уличает мать в фальшивости, ведь та слишком очевидно меняет стратегию взаимодействия во время разговора, и она с лёгкостью признаёт, что мыслит штампами. Также она молниеносно переходит из роли спасателя в роль агрессора и, наоборот, в роль жертвы, когда дочь пытается уличить ее в недостатках, что также характеризует стратегию взаимодействия персонажей в соответствии с треугольником Карпмана<sup>6</sup>. В связи с этим, возникает ощущение, что личностная субъектность матери Норы как таковая отсутствует, потому что её поведение носит дуальный характер и бессознательно нацелено на разрушение и подавление личности ее дочери, что сама мать воспринимает на осознанном уровне в качестве блага, ведь отсутствие эмоциональных привязанностей и определённая степень бесчувственности делает её неуязвимой для внешних обстоятельств. Однако для Норы подобный конфликт носит болезненный характер, ведь

мать стремится разрушить её самооценку, подвергая сомнению основные ценностные ориентиры, нивелируя роль дочери в её собственной жизни.

Схожая драматургическая структура конфликтного взаимодействия также представлена в эпизоде допроса в фильме «Дау. Наташа». Главная героиня, работница столовой в научном институте, Наташа, сталкивается с давлением тоталитарной системы после того, как один из коллег написал на неё донос за связь с иностранным ученым. Сотрудник органов госбезопасности пытается психологически подавить Наташу, применяя тактику «горячо-холодно», как на вербальном, так и на физическом уровнях взаимодействия. Допрос производится с целью вербовки героини в НКВД и начинается в благоприятной обстановке. Дознаватель в начале использует эмпатичную модель коммуникации, напоминая дружелюбное общение: он предлагает Наташе выпить алкоголь, угощает закуской, разрешает курить в помещении. В неожиданный момент поведение дознавателя резко меняется и он отводит женщину в соседнюю комнату, которая похожа на тюремную камеру, и его стратегия поведения становится агрессивной, в ходе которой он с лёгкостью примеряет к женщине насилие, после чего они вновь возвращаются в его кабинет и дознаватель продолжает вести себя доброжелательно. Смена помещений и манеры поведения, ориентированная на психологическое сближение и усиление эффекта от последующего насилия, повторяется несколько раз с целью воздействия на психику женщины и подчинения ее воли. Во время «агрессивной фазы» допроса дознаватель заставляет Наташу полностью раздеться, а потом насилует ее бутылкой, что является символическим наказанием за сексуальную связь с иностранцем. В данном случае дознаватель пытается обесценить не только личность Наташи, заставляя ее раздеться и применяя прочие унижительные меры в процессе допроса, но также нивелировать её ценности, которые сводятся к чувственным

<sup>5</sup> Karpman, S. B. The new drama triangles // karpmandramatriangle.com : [сайт]. — URL: (дата обращения: 10.12.2023).

<sup>6</sup> Berne, Eric What Do You Say After You Say Hello?. — London: Bantam Books, 1973. P. 186.

наслаждениям от близости с партнёром как в физическом плане, так и в эмоциональном. В результате, Наташа соглашается написать донос на иностранного ученого, с которым вступала в интимную связь, но после этого она применяет в отношении следователя неординарную тактику и пытается соблазнить его, создавая иллюзию, что их общение имплицитно носит романтический характер, и внушить, что между ними возникла обоюдная симпатия. Желая не разрушать с Наташей эмоциональную связь, с целью ее дальнейшей эффективной работы на органы безопасности, дознаватель в конце допроса целует её, после чего героиня уходит. Таким образом, в данном эпизоде взаимодействия персонажей результат допроса остаётся неоднозначным, ведь, с одной стороны, Наташа выполнила необходимые требования, написав донос на ученого, но, с другой, не поддалась внутреннему самоунижению, так как создала для себя самой иллюзию романтического чувства по отношению к своему насильнику, сохранив для себя ценность эмоциональной связи как таковой.

## ЗАКЛЮЧЕНИЕ

Драматургическое взаимодействие персонажей фильмов «Дау» осмысливает тоталитарную модель общества, которая стремится к подавлению индивида путем деконструкции его системы ценностей и приоритетов. Подобная агрессивная модель взаимоотношений общества и частного лица трансформирует психику и сознание человека, что провоцирует его действовать схожим образом с окружающими, если их ценности не соответствуют его представлениям о жизни. Таким образом, рождается иерархия социального насилия, которая превращается в замкнутую систему психологического подавления личной субъектности. Для разрушения чужой системы ценностей и насаждения собственной агрессор применяет такие стратегии как:

- обесценивание личности и ее системы приоритетов, которые являются источниками личностного удовольствия и

определяют роль индивида в его собственной жизни.

- стремление вызвать чувство вины у жертвы, тем самым понизить ее самооценку и заставить разочароваться в личных достижениях любого характера.
- спровоцировать чувства стыда, которое позволяет понизить статус жертвы в процессе взаимодействия с целью подавления ее воли и получения власти над ее эмоциями.

Следует отметить, что агрессор в исследуемом конфликтом взаимодействии выступает в сильной позиции, потому что представляет идеологические интересы коллектива, которые воспринимаются в качестве всеобщего блага, но при этом его частные интересы сводятся к стремлению получения власти над объектом подавления с целью подчинения его воли.

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# Linguistic Feelings of Some English-Speaking Students from the ENS of Maroua (Cameroon) and Strategies for Improving FLE/FLS Skills

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## ABSTRACT

Cet article analyse les sentiments linguistiques des étudiants anglophones de l'ENS de Maroua, capitale régionale de l'Extrême-Nord. Les vingt enquêtés viennent des Régions du Nord-ouest et du Sud-ouest au Cameroun. L'anglais, leur langue de scolarisation au primaire et au secondaire est désormais minoritaire à côté des langues véhiculaires et locales dans la ville de Maroua. Le sondage présente une diversité de situations et illustre une variation de rapports au français. L'étude expérimente le protocole de l'imaginaire linguistique développé par A-M. Houdebine (2002).

*Keywords:* sentiments linguistiques, usages, anglophones, fle/fls, formation bilingue, compétences.

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# Linguistic Feelings of Some English-Speaking Students from the ENS of Maroua (Cameroon) and Strategies for Improving FLE/FLS Skills

Sentiments linguistiques de quelques étudiants anglophones de l'ENS de Maroua (Cameroun) et stratégies pour l'amélioration des aptitudes en FLE/FLS

Amos Kamsu Souoptetcha

## RÉSUMÉ

*Cet article analyse les sentiments linguistiques des étudiants anglophones de l'ENS de Maroua, capitale régionale de l'Extrême-Nord. Les vingt enquêtés viennent des Régions du Nord-ouest et du Sud-ouest au Cameroun. L'anglais, leur langue de scolarisation au primaire et au secondaire est désormais minoritaire à côté des langues véhiculaires et locales dans la ville de Maroua. Le sondage présente une diversité de situations et illustre une variation de rapports au français. L'étude expérimente le protocole de l'imaginaire linguistique développé par A-M. Houdebine (2002). Les résultats présentent des perceptions représentatives du désir, de la dérision, du refoulement ainsi que des défaillances linguistiques. Certains sondés souhaitent améliorer leurs niveaux mais d'autres sont démotivés par une politique linguistique valorisant les langues vernaculaires. Il est également proposé des stratégies facilitatrices pour le perfectionnement des compétences en FLE/FLS. Quoique Dans le transfert et la réception des valeurs et normes linguistico-culturelles ne sont pas toujours équitables entre les Régions anglophones et la partie francophone d'un pays où le bilinguisme français-anglais est pourtant officiel.*

**Mots clés:** sentiments linguistiques, usages, anglophones, fle/fls, formation bilingue, compétences.

**Author:** Université de Maroua/ENS.

## I. INTRODUCTION

Dans le cadre de cette recherche, un sondage a été fait auprès de six étudiants anglophones de 2<sup>ème</sup> année et quatorze de 4<sup>ème</sup> année. Leur tâche était d'exprimer, dans un support scriptural, leurs opinions sur la langue française en général, et sur l'enseignement du français dans leur Université, après ces années passées au département de Langue Anglaise et Littérature d'Expression Anglaise (LA/LEA). L'objectif de cette réflexion est de connaître leurs représentations vis-à-vis du français et la finalité didactique est de proposer des pistes pour améliorer les compétences linguistiques des uns et des autres. Ce qui permet de montrer le rôle et l'importance de la notion de représentation didactique des langues, et en particulier celle du FLE. L'influence capitale (positive ou négative) que les représentations exercent sur l'enseignement/apprentissage et sur la pratique a été suffisamment démontrée par A-M. Houdebine-Gravaud (1983, 1996, 2002) et C. Canut (1998). C'est dans la voie préconisée par ces exégètes que va être orientée la présente réflexion. Aussi, des réponses seront-elles apportées à la question de savoir comment les jeunes étudiants anglophones perçoivent la langue française, son enseignement, et son utilisation dans un contexte multilingue où le fulfuldé est la langue véhiculaire dominante. Leurs perceptions laissent-elles transparaître un désir apparent ou même latent d'acquisition de la Norme? Sont-ils plutôt dans une posture d'indifférence donc de dérision ou de refoulement de cette Norme? Ces représentations paraissent essentielles, car elles conditionnent la qualité de l'apprentissage, le degré de confiance de l'individu, en l'occurrence le

jeune étudiant lors de l'usage du français dans un contexte politique, social et culturel particulier. Cette analyse permet d'observer ces différents points : traitement des données, portraits et langue des enquêtés, analyse des résultats et pistes pour une autoformation, voire une autorégulation.

## II. LE TRAITEMENT DES DONNÉES

De prime abord, il est impérieux de mettre l'accent sur le contexte dans lequel cette recherche a été menée, le questionnaire ainsi que sur les techniques de collecte des données.

### 2.1 Environnement de la Recherche: L'ENS de Maroua

L'Université de Maroua est la première et la plus grande université de la région de l'Extrême-Nord, constituée de deux Établissements et de cinq Facultés. Le programme de formation de futurs enseignants à l'ENS vise principalement la préparation des éducateurs pour l'enseignement secondaire. La formation fondamentale y est complétée par une unité d'enseignement intitulée "Formation Bilingue". Il s'agit des cours renforceurs de compétences communicationnelles en français pour les étudiants anglophones et en anglais pour les étudiants francophones. Les répondants ont été choisis parmi nos enseignants rencontrés dans le cadre de l'exécution d'un contrat didactique. La visée de cet enseignement n'est pas tant d'amener les locuteurs à faire usage d'un français avec des procédés linguistiques spécifiques ou des tournures d'embellissement de la langue. Il s'agit d'un enseignement sur objectif spécifique, susceptible de familiariser les étudiants anglophones à la pratique de la langue courante pour satisfaire à leurs besoins quotidiens en communication sur le campus et dans tout espace favorable aux interactions verbales. L'unique lieu de l'enquête a été le campus de Kongola-Djourgouf-Kodek où se déroulent les enseignements.

### 2.2 Le Questionnaire

Cette réflexion est une étude de terrain qui a nécessité une enquête en deux étapes. La

première a consisté en la réalisation d'une pré-enquête tout au long des enseignements. La phase préliminaire a permis de cerner les difficultés que peuvent avoir des locuteurs d'une langue en zone minoritaire ainsi que toute autre "situation problème". En situation de classe, des sentiments vis-à-vis du français ont servi à la construction des hypothèses et à l'élaboration du questionnaire. La plupart des questions formulées sont des questions ouvertes car, des réponses ne sont pas préalablement suggérées aux répondants. Ces questions sont orientées vers les pratiques linguistiques, les sentiments vis-à-vis des langues parlées et même les rapports à la Norme. Le choix du questionnaire comme outil de recueil de données permet d'offrir aux étudiants, l'occasion de s'exprimer librement. Étant préconstruit et bien cadré, il a permis de collecter des informations précises, ciblées et plus objectives en soumettant tous les enquêtés aux mêmes instructions.

Les participants ont répondu au questionnaire (en annexe) pendant une durée moyenne d'une heure. Il leur a été interdit de demander des clarifications sur des questions, l'intention étant de laisser libre cours à la conception et à la production écrite des uns et des autres.

### 2.3 Techniques

L'analyse thématique utilisée consiste à repérer des thèmes mentionnés par chaque étudiant quand il a réagi par rapport aux questions posées ; la visée étant d'analyser les opinions, jugements ou les attitudes élaborés par les étudiants concernant l'objet du travail. L'étude des réponses données par ces étudiants va aider à comprendre leurs rapports au français. Ainsi, dans les discours produits, les perceptions des locuteurs sur les questions sont à relever, vu que les attitudes construites autour d'une langue ont une incidence majeure sur les usages. C'est l'avis de C. Canut (1998 :14) pour qui, il faut "concevoir l'analyse des représentations linguistiques comme un sous domaine interprétatif des usages". Car l'objectif initial dans lequel s'inscrit l'étude des représentations est "l'impact sur la gestion des langues, sur les compétences communicatives et

donc sur la régulation des systèmes linguistiques" dans un milieu multilingue.

Bien plus, une analyse quantitative (de type hypothético-déductif) et qualitative (de type empirico-inductif) des réponses permet d'évaluer les divers discours épilinguistiques. Cette analyse est inspirée d'une méthodologie très répandue dans les analyses des représentations. En effet, "la recherche qualitative en sciences humaines a comme but premier de comprendre les phénomènes sociaux, soit des groupes d'individus ou des situations sociales" (Y. Poisson, 1991:12). C'est donc admettre qu'une affirmation n'est vérifiable qu'à partir d'un nombre de cas observés. Quant à l'approche quantitative, elle permet d'établir des relations de causalité, des relations entre variables sociales. Elle donne la possibilité de faire ressortir la proportion de locuteurs anglophones qui désirent, refoulent la langue française ou en sont indifférents. Elle donne aussi le prorata d'étudiants qui utilisent effectivement la langue, dans les différentes situations de communication. Il paraît aussi nécessaire d'indiquer le profil des enquêtés et de faire la lumière sur les langues qui facilitent leurs circulations.

### III. PORTRAITS ET LANGUES DES ENQUÊTÉS

L'échantillon, pour cette réflexion est de vingt étudiants volontaires qui, durant la période des

enseignements, livraient régulièrement leurs multiples sentiments sur leurs niveaux de langue. Par ces confidences, ils présentaient, ipso facto, les particularités linguistiques de la plupart de leurs camarades.

#### 3.1 Identification des Répondants

Pour cette identification, les variables mises en exergue sont la tranche d'âge, la langue officielle utilisée dans la famille d'origine et le diplôme le plus élevé. Parmi les vingt enquêtés, quinze sont des filles et cinq sont des garçons. Ils ont quasiment un même vécu socio-langagier car ils utilisent pour la plupart, sinon les mêmes langues pour certains, du moins des langues assez voisines pour d'autres. Beaucoup ont vu le jour, ont été scolarisés dans les régions du Littoral, Sud-Ouest et Nord-Ouest. Mais quelques-uns sont nés ailleurs et sont arrivés dans les zones anglophones du Cameroun à différents moments de leur vie. Ces traits ont été constitués à l'aide des réponses données dans la partie du questionnaire concernant l'identification des enquêtés. Dans le tableau quali-quantitatif ci-dessous, l'ensemble des éléments identificatoires considérés peuvent être observés.

*Table 1:* Identification des répondants

Numéros des enquêtés	Tranche d'âge		Langue officielle de la famille d'origine	Diplôme le plus élevé
	18-24 ans	25-30 ans		
E 1		×	Anglais	Licence anglais
E 2	×		Anglais	G.C.E A Level
E 3	×		Anglais	G.C.E A Level
E 4		×	Anglais	Bachelors Degree english
E 5		×	Français	Licence Bilingue
E 6	×		Français	Baccalauréat A4
E 7	×		Anglais	Licence en langue anglais
E 8		×	Français	Licence
E 9		×	Français	Licence en anglais
E 10		×	Anglais	Licence en anglais
E 11		×	Anglais	G.C.E A Level
E 12		×	Anglais	Bachelor's Degree anglais

E 13		×	Anglais	G.C.E Advanced Level
E 14		×	Anglais	Licence en anglais
E 15		×	Français	Licence en Lettres Bilingues
E 16		×	Anglais	Bachelor Degree English
E 17		×	Français	Licence en Linguistique
E 18		×	Anglais	Licence en Linguistique
E 19		×	Français	Baccalauréat A4 Esp
E 20		×	Français	Bachelor Degree Linguistics

### Légende:

- E : enquêté.
- G.C.E A Level (General Certificate of English Advanced Level): équivalent du diplôme de baccalauréat dans le système éducatif anglophone.
- Bachelor Degree : équivalent du diplôme de Licence dans le système éducatif anglophone.

Relativement au critère âge, quatre enquêtés (20%) se situent dans l'intervalle 18-24 ans; tandis que (80%), donc seize, ont un âge qui se situe entre 25 et 30 ans. Pour douze personnes de l'échantillon (60%), l'anglais est la langue officielle utilisée; et dans les huit autres familles (40%), c'est le français qui est la langue officielle de partage.

En ce qui concerne le diplôme le plus élevé, il a été relevé neuf licences en anglais ou Bachelor Degree in english soit un pourcentage de (45%), deux

licences en Lettres Bilingues (10%), trois licences en linguistique (15%), quatre G.C.E A Level (20%) et deux Baccalauréats A4 (10%). Après avoir mis en exergue les identités des étudiants, voyons ce qu'il en est de leur paysage linguistique.

### 3.2 Diversité des Langues Parlées

La troisième partie du questionnaire est centrée sur la connaissance des langues. Le tableau synoptique élaboré est le récapitulatif des réponses aux questions concernant: le nombre de langues parlées, le lieu d'apprentissage desdites langues, la langue officielle la plus utilisée ainsi que celle qui est préférée. Tout en sachant qu'"aucun discours ne restera sans provoquer l'identification de caractérisations identitaires de chacun de ses acteurs" (Garic 2014), voici les différents profils linguistiques des répondants dont les appartenances sont perceptibles à partir de leurs propres discours.

Table 2: Diversité linguistique

Enquêtés	Langues couramment parlées	Lieux d'apprentissage
E1	Anglais, français, pidgin, langue maternelle	Maison, école
E2	Anglais, français, bafut	Bamenda, école, village
E3	Anglais, français, ejagham	Douala, Kumba
E4	Anglais, français, langue maternelle	Maison, école
E5	Anglais, français, nda'nda	Maison, école, société
E6	Anglais, français, yemba, pidjin, allemand	Maison, école
E7	Anglais, français, bakossi	Maison, école
E8	Anglais, français, bakossi, bafia	Yaoundé, Bafia, Buea, Kumba, Tombel
E9	Anglais, français, nda'nda, pidjin	Sud-ouest, Centre, Ouest

E10	Anglais, français, bamoun	Maison, école
E11	Anglais, français, bulu	Maison, village, école
E12	Anglais, français, kenyang, pidjin	Maison, école
E13	Anglais, français, pidjin, lamaso	Yaoundé, village, école
E14	Anglais, français, pidjin, langue maternelle	Maison, école
E15	Anglais, français, foutouni, bagam	En famille, école
E16	Anglais, français, pidgin-english, akoose	Au quartier, école
E17	Anglais, français, allemand, bassa'a, maka'a, fufuldé, bulu	En famille, école, communauté fufuldé
E18	Anglais, français, akosse	Maison, école
E19	Français, anglais, yemba	Maison, école
E20	Anglais, français, ghomala	En famille, école

Du tableau qui précède, il ressort qu'en plus de l'anglais et du français, les nombreuses langues parlées par les uns et les autres sont notamment : bafut, ejagam, bakossi, kenyang, lamaso, akoose, (Cameroun anglophone), ndan'da, yemba, foutouni, bagam, bamoun, ghomala (Ouest), bafia (Centre), bulu (Sud), bassa'a (Centre et Littoral), maka'a (Est), fufuldé (Grand Nord), pidgin/pidgin-english (parler urbain sur l'ensemble du territoire national avec de nombreuses variétés de pidgin) et allemand. Mais une imprécision peut-être relevée à travers le rendu des deux répondants qui ont tout simplement parlé de leur langue maternelle.

En outre, les réponses ont été diversifiées, à la question de savoir "où avez-vous appris ces langues ?" Le village, le quartier, la maison (en famille), l'école, ou encore Yaoundé, Douala, Bafia, Bamenda, Buea, Kumba et Tombel sont les lieux les plus évoqués. Une répondante a cité trois régions du pays à savoir le Sud-ouest, le Centre et l'Ouest.

#### IV. ANALYSE DES RÉSULTATS

Le dépouillement et l'analyse des données collectées ont permis de voir ce que les langues peuvent impliquer ou susciter comme émotions, impressions, et différentes réactions des étudiants. Les résultats obtenus seront divisés en plusieurs parties incluant les différents thèmes et questions sur le rapport à la langue.

##### 4.1 Langue Utilisée et Appétence Linguistique

Pour ce qui est de la question : "quelle est la langue officielle que vous utilisez le plus à Maroua ?", il apparaît que le français est utilisé par (65%) des étudiants soit un nombre de treize sur vingt. Et les motivations sont diverses: la région ciblée est une zone francophone, le background culturel de la famille d'origine, de nombreux interlocuteurs ne comprennent pas l'anglais, le souci d'améliorer la compétence linguistique ou alors, c'est la langue dont on a une bonne connaissance. Les sept autres répondants (35%) se servent régulièrement de l'anglais. Les justificatifs sont les suivants: langue utilisée entre amis ainsi qu'à l'école, langue de scolarisation ou langue la mieux maîtrisée.

Quant à la question : "laquelle des langues officielles préférez-vous?", seize étudiants (80%) ont une appétence pour l'anglais tandis que trois (15%) penchent pour le français et une (5%) opte pour le français et l'anglais. Voici l'intégralité des sentiments donnés, perceptions qui participent de la motivation de leurs choix.

E1 : *Je préférer anglais parce que ce la langue qui permit moi causé avec mes amis et tout le monde.*

E2 : *L'anglais parce que c'est la première langue facile à parler et écrire pour moi avant ma langue maternelle.*

E3 : *La langue française parce que c'est d'abord la première langue que je suis entré*

en contact dès l'enfance et je me sens plus sur et confortable en utilisant cette langue.

E4 : Je préfère l'anglais parce-que avec je communique bien mes avec français je deprimé seulement.

E5 : L'anglais parce que c'es la langue ou je peux facilement expliquer quelquechose à quelqu'un.

E6 : Je préfère l'anglais, car c'est la langue la plus utilisée dans le monde et dans les médias. En plus, elle n'est pas tellement difficile à parler, il faut juste avoir l'habitude de l'utiliser.

E7 : Je préfère anglais parce que ce la langue j'ai bien maîtriser.

E8 : Quand je m'exprime en anglais je suis plus à l'aise parce que c'est ma langue première. En plus, j'ai fait les études anglophone.

E9 : L'anglais parce que je maîtrise bien cette langue.

E10 : Je préfère les deux langues. Parce que pour être considéré comme un(e) bon(ne) citoyen Camerounais il faut avoir la connaissance des deux langues officielle.

E11 : Je préfère l'anglais parce qu'elle facilite l'intégration internationale et je crois que si je vais en Europe ou en Chine je pourrais facilement m'ensortir si je parle anglais.

E12 : Je préfère Anglais plus que l'autre, pas-ceque c'est la langue de le monde et au media.

E13 : Je préfère la langue française parceque c'est cette langue qui vient compléter la langue première qui fait en sorte que je sois bilingue et que je m'exprime bien en tous les deux langues.

E14 : Langue Anglais.

E15 : L'anglais.

E16 : La langue française parcequ'elle me permet d'être bilingue et aussi parceque mon entourage s'exprime le plus souvent dans cette langue.

E17 : Je préfère l'Anglais car c'est une langue qui ouvre beaucoup d'horizons et offre des débouchés diverses.

E18 : Je préfère l'anglais parceque ce je m'exprime bien dans ce langue.

E19 : L'anglais parce-qu'il est incontournable aujourd'hui et en tant que future enseignant je me dois de le maîtriser.

E20 : Je préfère l'Anglais parce qu'il a un cursus plus ordonné et on sait déjà à l'avance qu'elle filière choisir de par ses matières de base.

Les multiples sentiments exprimés démontrent la préférence linguistique et surtout l'appartenance des différents enquêtés. Aussi peut-on comprendre le fondement de ces propos :

*appartenir à un groupe étendu (ou encore à un groupe pourvu de dimensions historiques), c'est posséder et/ou exprimer certains traits qui sont susceptibles de manifester ou de signifier que l'on se situe, ou se conçoit dans un cadre collectif d'intérêts ou d'un destin partagés avec d'autres sujets, catégories de façon équivalente, en opposition significative avec d'autres sujets relevant de groupes autrement caractérisés.* (M. Oriol et M-A. Hily, 1981: 149).

L'observation et l'analyse des discours sur la langue présentent de nombreux résultats. De l'avis des répondants, l'anglais a des statuts variés : première langue, langue de la circulation internationale, langue de communication, langue facile, langue de scolarisation, langue des médias, d'ouverture ou langue la plus utilisée. Pour ce qui est du français, elle est aussi la première langue, la langue seconde, la langue qui donne accès au bilinguisme et celle qui permet de justifier l'appartenance à la nationalité camerounaise.

#### 4.2 Représentations du Français

Relativement à la question : "à quoi vous sert la langue française à Maroua?", tous les répondants attestent qu'elle permet de communiquer et de circuler dans la ville. Toutefois, certains relèvent que le premier obstacle communicationnel

demeure le nombre très élevé d'utilisateurs du fufuldé. Il appert que l'anglais ne sert que dans des cadres institutionnels et même en communauté ou entre amis.

Une autre question est celle-ci: "Le français favorise-t-il l'intégration sociale dans cette ville? Justifiez votre réponse". Voici les réponses fournies sur les fiches:

E1: *oui, parce que dans la ville de Maroua les gens de Maroua sont les francophones.*

E2: *oui car après le fufuldé, c'est le français donc une connaissance de cette langue facilite l'intégration.*

E3 : *cette langue favorise l'intégration sociale à Maroua dans la mesure où elle me permet d'être en accord avec mon entourage.*

E4: *le français facilite l'interaction sociale dans cette ville.*

E5 : *oui parce que à part le fufuldé c'est le français qui est utilisé.*

E6 : *oui, car à défaut du fufuldé ,il faut au moins parler le français,deuxième langue utilisé par les autochtones.*

E7: *non. Je ne crois pas ; parce que a Maroua, le française c'est la langue de l'école et le bureau mais dans les quartiers ;tu ne parle pas le fufuldé tu ne connais rien.Donc c'est le fufuldés qui réunissent plus les gens dans cette ville.*

E8: *pas complètement.il y a quand même les personnes qui comprennent le français avec lesquelles vous pouvez vous s'intergré facilement mais d'autre sont nulle et ne comprennent que le fufuldé qui rend l'intergration sociale un peu difficile.*

E9 : *oui parce que sans cette langue ont ne peu pas communique avec les gens de Maroua.*

E10: *pas vraiment, parce que avec le fulfuldé on peut communique avec le gens de Maroua.*

E11 : *le française favorise l'intégration sociale dans cette ville mais à un rythme pas tres accelerer car bon nombre de la population ne*

*comprennent pas véritablement cette langue .la communication est difficile.*

E12 : *oui, parce que la population en Maroua c'es la région francophone.*

E13 : *je peux dire oui parce que sans le français qui est une langue des langues officielles au Mameroun, l'intégration ne peut pas être possible surtoût que le français est parlé beaucoup plus ici à Maroua qui est une zone francophone donc nous sommes obligé de parler cette langue.*

E14 : *oui par ce qui dans la ville de Maroua,il a beaucoup de person qu'il parle français.*

E15: *non .parce que les habitants de cette ville parlent le fufuldé et aiment s'entretenir avec les gens de leur espèces.*

E16 : *oui le français facilite l'intégration sociale dans cette ville surtout comme la ville devient de plus en plus cosmopolite grâce à l'avènement de l'université qui osmose des gens de différentes culture, background et qui suit pour la plupart d'expression française .elle favorise vraiment l'intégration sociale dans cette ville car l'interaction entre les uns et les autres devient un peu plus fluide.*

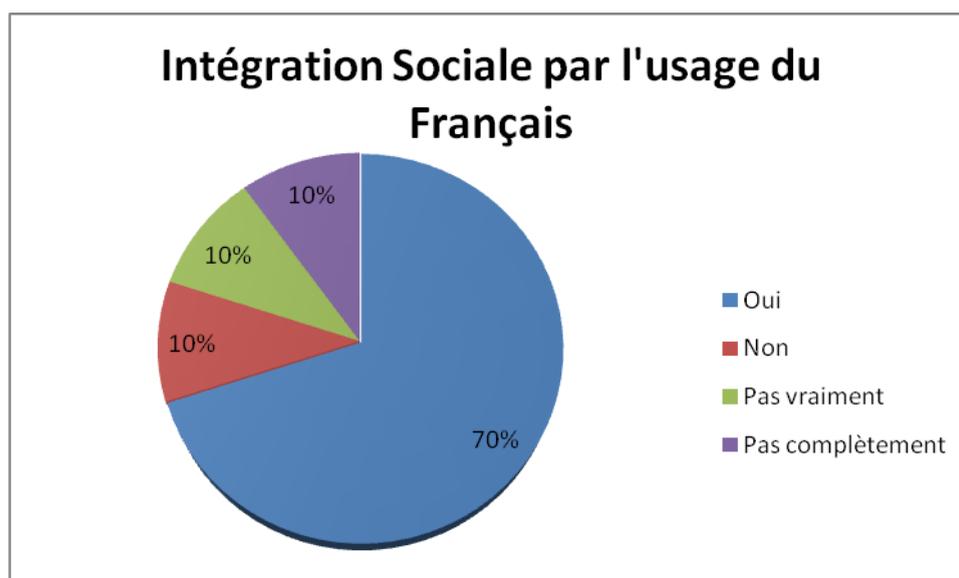
E17: *pas vraiment .Dans la ville de Maroua puis s'intégrer il faudrait maitriser le fufuldé car c'est parlé en banque et même dans les locaux administratifs.*

E18 : *pas complètement parce que beaucoup des gens même les administratives parlent et comprend mieu en fufuldé et moin en français.*

E19 : *oui il favorise l'intégration social parce qu'il permet aux population de diverses cultures et appartenance linguistique, vue que la ville accueil de plus en plus d'étrangés avec l'avènement de l'université.*

E20: *yes this is because the population is mostly french speaker.*

La synthèse des attitudes mitigées est perceptible dans ce tableau où l'accent est mis sur le nombre et le pourcentage des répondants.



De ce diagramme à secteur, il ressort que les regards perceptibles à travers les réponses "oui", "non", "pas vraiment" et "pas complètement", sont le reflet d'une situation dont les uns et les autres ont clair conscience. En réalité, n'étant pas très alphabétisée, la population a tendance à utiliser la langue locale dans les différents espaces de rencontre publique.

"Quels types de lacunes avez-vous quand vous vous exprimez?" Cette autre question a permis de collecter les données observables ci-dessous.

E1 : *pour construire une phrase sa mes depasse et parfois le vocabulaire.*

E2 : *parler avec éloquence la langue et les problèmes d'écritures.*

E3 : *j'ai des difficultés au niveau de l'expression et les différentes règles de la grammaire.il m arrive parfois d'être emporté par une complèxe d'infériorité à l l'égard de cette langue.*

E4 : *la types de lacunes ce pour communiquer bien.*

E5 : *mes lacunes sont au niveau des accords et l'épélation.*

E6 : *Parfois c'est le vocabulaire qui me manque. Sinon, je la parle aisément.*

E7 : *L'une deux est comment ou quand utiliser quel article et adjectifs.*

E8 : *La langue française est très complexe.il y a plusieurs règles à suivre et appliquer, surtout l'accord du participe passé.*

E9 : *L'un de lacunes que je en utilisant la langue française ce le non maîtrise des articles.*

E10 : *Je ne maitrise par les articles en français.*

E11 : *j'ai des sérieux problèmes en grammaire, avec la concordance des temps et l'accord; la ponctuation.*

E12 : *La type de lacune que ont confonté c'est conjugaison des phrases et vocabulaire.*

E13 : *les problèmes se retrouve souvent au niveau de la prononciation (un problème des articles) il y a également l'orthographe qui pose problème et l'accord.*

E14 : *lacunes de communication, lacunes de écrire, pour construire une phrase.*

E15 : *je n'ai aucune lacune en utilisant la langue française.*

E16 : *le lacune constaté est sur le plan oral.je n'arrive pas à m'exprimer confidemment parce que je n'ai pas habité pendant longtemps dans une zone francophone. J'ai étudié le français plutôt à l'aide des livres à la maison.*

E17 : *juste des lapsus.*

E18 : *Je ne maîtrise pas les articles en français.*

E19 : *mes lacunes sont de deux types : des erreurs au niveau de l'expression orale comme la mauvaise construction des phrases lorsqu'on parle très vite. Et les fautes d'orthographe lors de l'expression écrite.*

E20: *the type of problem it encounter are mostly in tenses.*

Ce que laissent entrevoir ces attitudes est que les difficultés concernent toutes la grammaire et ses sous branches. Aussi a-t-il été mentionné, les problèmes liés aux aspects de la grammaire et de la linguistique que sont : conjugaison, déterminant, syntaxe, production écrite, communication orales, accents, vocabulaire, prononciation, règles d'accord, usage des adjectifs etc. Ces difficultés sont davantage perceptibles à travers la pratique, donc les fautes commises. Des pistes envisageables peuvent, face à cet état de fait, être envisagées.

## V. PISTES POUR AUTOFORMATION ET AUTOCORRECTION

À la base de tout processus didactique se trouvent les apprenants. Après avoir analysé les productions des répondants, il convient de citer leurs propositions qui correspondent au souci de compléter les enseignements par une autocorrection. Ces indications sont des solutions possibles pour l'amélioration de leurs compétences linguistiques. Comme on peut le constater, "on ne peut proposer un programme ou une méthodologie de travail sans revenir aux apprenants, surtout dans le domaine de l'enseignement-apprentissage des langues étrangères" (Z. Medoukh, 2008 :17). La synthèse des propositions qui résultent de la question : "Faites-vous des efforts pour améliorer votre niveau de langue ? Si oui lesquels ?" sont les suivantes : l'utilisation du français en compagnie des camarades francophones en classe; la lecture fréquente des journaux, dictionnaires et manuels en français; la production écrite; le recours aux aînés et aux étudiants francophones pour corriger les fautes; l'intérêt pour les séries télévisées

diffusées en français et la fréquentation des amis francophones.

Le dépouillement des fiches a permis de relever que 60%, donc douze étudiants sur vingt n'ont pas répondu à cette question. Parmi les huit réactions, six sont celles des filles et seulement deux, celles des garçons. Malgré leurs âges, il nous a semblé que les futurs enseignants n'avaient pas encore conscience de ce que la connaissance et l'utilisation de la norme et surtout le recours au français fondamental est avantageux pour eux. Au regard du mutisme observé à ce niveau, notre sentiment est que de nombreuses raisons peuvent justifier cette situation. Il peut être évoqué, le manque de motivation réelle donc le refoulement du français (ils sont formés à l'ENS pour enseigner l'anglais plus tard), l'absence d'inspiration le jour de l'enquête, l'inattention des répondants ou encore la précipitation.

En plus, des solutions observables dans les propositions des apprenants, d'autres solutions envisageables peuvent être esquissées à grands traits. De la sorte, les NTIC constituent une plus-value dans la perspective d'une amélioration des compétences linguistiques. Aussi est-il possible d'avoir recours aux méthodes structuro-globale et audio-orale grâce auxquelles l'apprentissage est facilité par les images et les dialogues. La lecture de *Quelques grammaires françaises pour anglophones* (F. Lapointe, 1993) ou des *Difficultés grammaticales* (R. Lagane, 1995) résoudrait des problèmes persistants d'expression orale, de production et de reproduction écrite. C'est aussi le lieu de suggérer des cours de français interactifs, des programmes intensifs de français (PIF) et des *apprentissages linguistiques médiés par les Learning Management Systems* (J-L. P. Bergey, 2016) comme solutions efficaces pour une acquisition rapide des fondamentaux du français. Il peut aussi être envisagé le moyen d'inciter les apprenants à interagir tous ensemble afin de réaliser des tâches réelles au sein de la société virtuelle. En s'appuyant sur la perspective actionnelle et sur le Web social, ils pourraient résoudre leurs difficultés et obstacles didactiques et acquérir de nouvelles compétences en français (Abdulrahman, 2016). Des dispositifs comme "la

télécollaboration, l'interaction à dominante synchrone/asynchrone" (F. Manganot et al., 2010) et l'"interactivité et interactions sur un site d'apprentissage et de réseautage en langues" (L. Chotel, 2012) permettraient également de juguler le problème de l'accès à un niveau linguistique fiable par le numérique, en dépit des difficultés d'accès aux espaces virtuels (réseau et connexion) dans les Zones d'Éducation Prioritaires (ZEP).

Les méthodes communicative, interactionnelle et cognitive qui mettent l'accent sur les besoins langagiers exprimés par les étudiants sont aussi appropriées dans ce contexte. Dans cette perspective, il n'est plus exclusivement question de se conformer au tabou de la traduction de la L1, mais une réhabilitation des explications grammaticales est préconisée.

## VI. CONCLUSION

Les attitudes observées aussi bien lors des enseignements qu'à travers l'enquête montrent que la classe de formation bilingue, demeure un lieu de débordement des émotions: ennui, frustrations, impatience, peur du ridicule, anxiété... mais aussi enthousiasme et empathie. L'étude a permis de comprendre comment ces émotions et certains comportements (ouverture d'esprit, sens du partage...) influencent l'apprentissage d'une langue seconde. Tout au long des interactions, en situation de classe, nous avons évité de donner trop de travail aux étudiants même s'il est important qu'ils pratiquent beaucoup. Il paraissait ridicule de faire le clown devant eux, de peur de trop gesticuler pour expliquer des concepts. La raison étant que la gestion du temps, l'hétérogénéité des profils, le respect des fiches de progression et l'atteinte des objectifs opérationnels relativement au contrat didactique étaient une préoccupation centrale. Néanmoins, la question du français intermédiaire pour étudiants anglophones, avec des sections de vocabulaire, grammaire, sujets de conversation, dossier thématique et activités écrites, a été au centre de la démarche adoptée. Toutefois, il a parfois été toléré des jeux de rôle qui donnent la possibilité aux étudiants volontaires (qui n'ont pas peur de se tromper) de prendre la parole pour participer à la construction de l'enseignement. En

réalité, les relations pédagogiques enseignant-apprenant sont réparties dans un ordre hiérarchique qui implique que l'enseignant soit la source du savoir et l'apprenant, le consommateur passif de ce savoir. Mais les solutions envisagées permettent de poser les jalons d'un projet d'actions linguistiques dans une ZEP. La visée est d'éduquer les étudiants à une auto-formation guidée par la quête d'une thérapie, tout en restant attentif à la part expérientielle des parcours de vie. En outre, les stages linguistiques dans les "Centres Pilotes" et surtout par immersion (le Cameroun comporte sept autres régions francophones) semblent être une solution très pratique. Le fait, pour les apprenants, d'être encadrés dans un milieu étranger (sans contact direct avec le milieu d'origine) ayant un taux d'alphabétisation élevé est un avantage majeur de cette piste. Ils auraient la possibilité d'appliquer la méthode du "learning by doing" (fondée sur l'activité de l'apprenant) de Jonh Dewey, d'"aller vers" le français pour juguler les difficultés inhérentes à la pratique. Vu de la sorte, la combinaison d'une médiation humaine et d'une médiatisation numérique est une approche vectrice et porteuse d'une intégration par le prisme de l'agir individuel/social pour accéder à la langue. Au regard de l'insécurité linguistique qui transparait des pratiques et demeure perceptible aussi bien distinctement qu'en toile de fond des rapports à la langue proposés, ce qui adviendrait à manquer est une réelle détermination et/ou une passion manifeste.

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## ANNEXE

### Questionnaire

#### a. Identification des enquêtés

- Nom et prénom-----
- Tranche d'âge : 20-25 ans  ; 25-30 ans  ; plus de 30 ans .
- Sexe : Masculin , Féminin .
- Diplôme le plus élevé-----

#### b. Connaissance des langues

- Combien de langues parlez-vous ?----- Nommez-les-----
- Où avez-vous appris ces langues ? À l'école ----- à la maison----- autres lieu à préciser-----
- Au Cameroun, il existe deux langues officielles : le français et l'anglais ; laquelle utilisez-vous le plus dans la ville de Maroua? -----
- De ces deux langues, laquelle préférez-vous ?-----Pourquoi ?-----

#### c. Représentation du français

- À quoi vous sert la langue française à Maroua? -----
- Le français favorise-t-il l'intégration sociale dans cette ville ? -----
- Quels types de lacunes avez-vous quand vous vous exprimez ?-----
- Faites-vous des efforts pour améliorer votre niveau de langue? ----- Si oui, lesquels ? -----

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*Elena Kozlova & Aleksandr Klimashevsky*

*National University of Ukraine*

## ABSTRACT

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# Modeling the Individual Movement Structure of Highly Skilled Athletes in Javelin Throwing

Elena Kozlova<sup>α</sup> & Aleksandr Klimashevsky<sup>σ</sup>

## ABSTRACT

*Introduction: The article deals with the modeling of the individual movement structure of highly skilled athletes in javelin throwing.*

*Material and methods: analysis of scientific and methodical literature and Internet information; video recording; video computer analysis; modeling; methods of mathematical statistics. The study involved 24 athletes of different skill levels and analyzed 80 javelin throwing attempts.*

*Results: The javelin throwing technique of athletes of different skill levels was compared. The closest relationships between the studied biomechanical indices were established and the most informative ones were identified. Regression models were developed, which included the following indices: dependent explanatory variable (Y) - javelin flight distance, independent explanatory variables ( $x_n$ ): javelin departure speed, length of the final javelin acceleration, the trunk-vertical angle at the moment of departure, javelin departure angle, speed of athlete body GCM at the end of the final part of the run-up, speed of athlete body GCM during the previous final part of the run-up, duration of the support phase of the first throwing stride in the final part of the run-up, force gradient during the support phase of the first throwing stride in the final part of the run-up.*

*Conclusions: Regression models of the kinematic and dynamic structure of the javelin throwing technique allow the prediction of individual variants of the technique, which are focused on achieving the planned result in accordance with the fitness level of a particular athlete.*

*Keywords:* modeling, javelin throwing, techniques, individualization.

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## I. INTRODUCTION

The technical mastery of athletes at the current stage is one of the priority factors in achieving a high sports result. Efficiency is determined by the way athletes master the most rational model of existing sports techniques.

Javelin throwing is a speed-strength, acyclic exercise, the main purpose of which is to achieve the maximum result within the established rules. Experience and numerous scientific studies have formed specific technical requirements in javelin throwing [3, 5]. Over the past decades, specialists from different countries have been actively working to analyze the throwing technique of the world's best athletes. The purpose of these studies is to conduct observations of elite athlete performances at the major competitions with the use of modern techniques, to create a base of their biomechanical parameters; to provide coaches with qualitative information about individual techniques; to expand knowledge about sports results limiting factors; to present data about specificity of technique in men and women, and athletes of different skill levels [3, 5, 6, 10, 11]. In our opinion, the process of technical preparation improvement can be more effective if we create models of the optimal kinematic and dynamic structure of the javelin throwing technique, which allows us to predict individual variants of the technique, focused on achieving the planned sports result. This requires a clear understanding of which biomechanical indices should form the basis of this model, that is, it is necessary to identify informative indices that affect the achievement of high sports results, as well as to

establish regularities of changes in these biomechanical indices with the improvement of the athlete's skill level.

## II. OBJECTIVE

Development of regression models for assessing the javelin throwing technique of athletes of different skill levels to focus on technical preparation individualization.

## III. MATERIAL AND METHODS

The following methods were used to achieve the objective: analysis of scientific and methodical literature and Internet information; video recording; video computer analysis; modeling; methods of mathematical statistics.

Organization of study. In the first stage, the analysis of scientific and methodological literature, analysis and generalization of the experience of practical activity concerning technical preparation of athletes were carried out. Kinematic and dynamic indices of the javelin throwing technique influencing the achievement of high sports results were studied.

Searching experiment was conducted in the second stage. To obtain complete information about the biomechanical structure of javelin throwing technique, kinematic characteristics (temporal, spatial, and spatial-temporal) were investigated and the dynamic ones were calculated. Video recording by means of the SONY Didigital 8 digital camera, which was fixed with camera axis perpendicular to the vector of athlete's displacement, was made to obtain biomechanical characteristics. All metrological requirements were taken into account, which allowed to minimize the systematic and random errors that arise due to the specific properties of optics; correct scaling of the shooting plane to further determine the real coordinates of the required points; correct camera navigation in space relative to the plane of motion. The cameras were fastened at a distance of 20 m from the subjects. The shooting frequency was 50 frames per second. The probability of error during video recording was 5%, that is, the significance level  $\alpha = 0.05$ .

The video recording was conducted in the conditions of a training camp in Ukraine (Koncha Zaspa). The study involved 20 skilled javelin throwers who have the sports title of Candidate Master of Sports of Ukraine (CMSU). Written consent to participate in the study was obtained from all participants. Each of the athletes performed 15-20 attempts, but we selected the three best attempts of each athlete, which allowed us to analyze 60 attempts. The javelin flight range was used as the main and system-forming index that organizes other elements of the throwing technique into a single system. The results of the studied javelin throwing attempts by skilled athletes averaged 64.2 m  $S=1.2$  m, the maximum value was 66.4 m, and the minimum value was 59.8 m. After analyzing the results of the attempts, we can conclude that the group is homogeneous, as evidenced by the low value of the coefficient of variation ( $V=1.8\%$ ), as well as the close values of the mean, mode, and median ( $\bar{x}=64.2$ ;  $M_0=64.2$ ;  $M_e=63.8$ ).

To compare the indices of javelin throwing technique, 20 attempts by four highly skilled athletes who hold the sport title of Master of Sports of International Class (MSUIC) were analyzed. We recorded all the attempts that the athletes performed in training with the goal of maximizing their performance, but the five best attempts of each athlete were selected.

The results of the studied javelin throwing attempts by highly skilled athletes averaged 73.8 m  $S=2.4$  m, the maximum and minimum values constituted 76.8 m 72.4 m, respectively. Having analyzed the results of the attempts, we can conclude that the studied group is homogeneous, as evidenced by the low value of the coefficient of variation ( $V=3.2\%$ ), as well as the close values of the mean, mode and median ( $\bar{x}=73.8$ ;  $M_0=73.4$ ;  $M_e=73.6$ ).

Since indices of the kinematic and dynamic structure of the technique of highly skilled and skilled javelin throwers corresponded to the law of normal distribution, which was confirmed by means of  $\chi^2$  – Pearson criterion, the statistical significance of the difference between biomechanical characteristics of the technique of

highly skilled and skilled javelin throwers was determined by means of parametric Student criterion for independent samples.

- Video computer analysis of motor action biomechanical structure was conducted by means of "BioVideo" software developed by I.V.Khmelnyska [7, 8] at the Kinesiology Department of the National University of Physical Education and Sport of Ukraine. It permits obtaining kinematic and energy characteristics of human motor actions on a videogram. Elaborated technology of human movement computer monitoring includes the packages of "BioVideo" applied programs. The raw data for the "BioVideo" program are the files of single-plane video recording frames of human motor action in .BMP, .DIB, .WMF, .EMF, .GIF, .JPG, .JPEG formats. The Windows XP operating system that runs the program allows to obtain these files directly from the local computer storage devices, peripheral device, or through remote access using a computer network or Internet email. "BioVideo" allows to receive biomechanical characteristics of both individual biolinks and the whole body in each frame and in separate phases of motor activity. "BiVideo" applied software includes four modules:
- Constructing models of the human locomotive system (LMS) (14-segment model of LMS was used, coordinates of the links of which corresponded to those of human body biolink position in space according to the geometric characteristics, whereas zero numbers - to coordinates of the major joint centers); the module allows to create multilink models of human LMS [9];
- Determining coordinates of points relative to the somatic frame of reference;
- Calculating motor action biomechanical characteristics according to coordinates of the human LMS model; module software capabilities allow calculating localization of center of mass (CM) of biolinks and general center of mass (GCM) of human body;
- Module for constructing biokinematic scheme (BKS) of the human body based on motor action videogram with definition of

trajectories of joint centers, biolink CM and human body GCM.

The preparation of high-class athletes in modern sports is organically linked to modeling - the process of developing and using different types of models [4]. A model (from the Latin modulus - measure, sample) is usually understood as a standard, a benchmark, whereas in a broader sense - any sample (imaginary or conditional) of an object, process, or phenomenon. In our studies, this method was used to model the kinematic and dynamic characteristics of the javelin throwing technique in the process of technical training of skilled athletes. Regression models of javelin throwing technique were developed, which include: the dependent explanatory variable (Y) - the javelin flight range, and independent explanatory variables (xn).

Statistical analysis. To analyze the significance of indices of the javelin throwing technique by athletes of different skill levels, a correlation analysis was conducted. The informative biomechanical indices of the javelin throwing technique of athletes, which had the greatest correlation with the sports result, were determined. The Pearson correlation coefficient was used to reveal the relationship between the kinematic characteristics of the javelin throwers' technique, since the analysis of correlation fields allowed to identify a linear relationship between the indices of their technique and sports result. The correlation coefficients were tested for significance (relative to zero) at the levels of 1 % and 0.1 % using the two-sided criterion.

To predict the specified range of the javelin, modeling using regression equations was used.

In the calculations, a reliability level of 95 % was assumed (significance level  $p = 0.05$ ). The statistical significance (p) of the indices in the correlation and regression analyses was obtained at higher levels - 0.01 and 0.001.

Mathematical processing of the research results was performed using Microsoft Excel XP and Statistica 10.0 (StatSoft, USA).

#### IV. RESULTS

During the analysis of motor actions, the movement is conditionally divided into periods and phases. A phase of a motor action is a conditionally allocated part of a movement, which has its separate motor task. In javelin throwing four main phases are distinguished: the preliminary part of the run-up, the final part of the run-up (preparation for the throw), the final effort and braking.

During the preliminary part of the run-up, the athlete gains optimal speed through gradual acceleration.

From the place where the control mark is located, the athlete begins to perform the final part of the run-up - throwing strides. Their number can be different - from 2 to 6. The athletes who took part in the study made four throwing strides in the final part of the run-up, which is the most common variant.

The final effort, which ends with a javelin throw, begins when the projection of the general center of mass (GCM) of the body passes through the area of support relative to the left foot placement on the support at the moment of carrying it through the right foot.

Braking occurs immediately after the javelin departure. The athlete tries to extinguish the

remaining energy with the supporting leg by stepping on the support leg, or simply by jumping forward, dampening the inertia of the movement, or by falling forward on the chest. Javelin throwers determine the method of braking themselves.

In the course of the study, a correlation was made between the flight range and 82 different parameters of the kinematic and dynamic structure of the javelin throwing technique in all phases (the preliminary part of the run-up, the final part of the run-up, the final effort, and braking).

During the comparative analysis of the kinematic and dynamic structure of the javelin throwing technique by skilled (CMSU) and highly skilled athletes (MSUIC) significant differences in parameters [1], which are presented in Table 1 were revealed.

To study the significance of separate indices of the javelin throwing technique by athletes of different skill levels, a correlation analysis was made, according to the results of which the closest interrelations between the studied indices were established and the most informative ones were revealed. The obtained values of the correlation coefficient between the javelin flight distance and different indices of throwing technique in highly skilled and skilled athletes are presented in Table 1.

**Table 1:** The values of the coefficients of correlation between the javelin flight distance and various indices of throwing technique in highly skilled and skilled javelin throwers

Index	Value of correlation coefficient	
	Highly skilled athletes – MSUIC (n = 20)	Skilled athletes – CMSU (n = 60)
Javelin departure speed, m·s <sup>-1</sup>	0,92**	0,88**
Length of the final javelin acceleration, m	0,87**	0,82**
Trunk-vertical angle at the moment of departure, degree	0,82**	0,78**
Departure angle, degree	0,77**	0,72**
Speed of athlete body GCM at the end of the final part of the run-up, m·s <sup>-1</sup>	0,71**	0,69**

Speed of athlete body GCM during the previous final part of the run-up, m·s <sup>-1</sup>	0,69**	0,61**
Duration of support phase of the first throwing stride during the final part of the run-up, s	0,66*	0,66**
Force gradient in the support phase of the first throwing stride during the final part of the run-up, H·s <sup>-1</sup>	0,62*	0,64**

Note. \* – correlation coefficients are statistically significant at the level of  $p < 0,01$ ; \*\* –  $p < 0,001$ .

As we can see, the most significant interrelations of the javelin flight range are observed with indices of kinematics in the phase of the final effort.

After analysis of the revealed dependencies, the general regularities concerning the javelin throwing technique of athletes of different skill levels were determined. It was found that the improvement of sports results is associated with the increase in the values of all biomechanical indices indicated in Table 1, except for the duration of the support phase of the first throwing stride in the final part of the run-up, which tends to decrease along with the improvement of athlete's skill level.

The obtained data allowed to develop group models based on the study of a specific set of athletes (CMSU and MSUIC), which differed in specific features within a particular sports event (javelin throwing), skill and fitness levels [2]. Orientation on them allows to determine the main directions of technical improvement of certain

groups of athletes. However, it does not permit taking into account individual peculiarities of the javelin throwing technique. Therefore, we have developed regression biomechanical models of the javelin throwing technique, focused on the achievement of the planned sports result by a particular athlete.

The following indices were included in the regression models: dependent explanatory variable (Y) - javelin flight range, independent explanatory variables (xn): javelin departure speed, length of the final javelin acceleration, trunk-vertical angle at the moment of departure, javelin departure angle, speed of athlete body GCM at the end of the final part of the run-up, speed of athlete body GCM during the previous final part of the run-up, duration of the support phase of the first throwing stride during the final part of the run-up, force gradient in the support phase of the first throwing stride during the final part of the run-up. The developed models are presented in Table 2.

Table 2: Regression models for assessment of skilled javelin thrower technique

No s/n	Multiple regression equations	Multiple regression coefficient	Model error
1	$Y = 1,96 + 1,141x_1 + 3,172x_2 + 0,029x_3 + 0,079x_4 + 0,0028x_5 + 0,2979x_6 + 7,23x_7 + 0,00016x_8$	0,846	1,52
2	$Y = 4,12 + 1,023x_1 + 4,141x_2 + 0,298x_3 + 0,135x_4$	0,809	1,07

Notes:

Y – distance of javelin flight, m;

$x_1$  – javelin departure speed, m·s<sup>-1</sup>;

$x_2$  – length of the final javelin acceleration, m;

$x_3$  – trunk-vertical angle at the moment of launching, degree;

$x_4$  – departure angle, degree;

- $x_5$  – speed of athlete body GCM at the end of the final part of the run-up,  $m \cdot s^{-1}$ ;  
 $x_6$  – speed of athlete body GCM during the previous final part of the run-up,  $m \cdot s^{-1}$ ;  
 $x_7$  – duration of support phase of the first throwing stride during the final part of the run-up,  $s^{-1}$ ;  
 $x_8$  – force gradient in the support phase of the first throwing stride during the final part of the run-up,  $H \cdot s^{-1}$ ;  
 1 – expanded regression equation;  
 2 – regression equation for the operative control

The regression models of the optimal kinematic and dynamic structure of the javelin throwing technique allow for predicting individual variants of the technique aimed at achieving the desired result. The use of the developed models significantly facilitates the process of current and operational control, as well as allows to:

- evaluate differentially the technical fitness of skilled javelin throwers;
- predict sports results necessary for success at different stages of preparation with account for the objective criteria of javelin throwing technique;
- create a data bank of competitive activity and special fitness of athletes;
- analyze and model technical fitness characteristics of javelin throwers influencing the achievement of high sports results;
- plan training programs with account for the revealed regularities of rational construction of movements in javelin throwing aimed at achievement of high sports results, skill and special fitness levels;
- individualize the process of technical training of javelin throwers.

## V. DISCUSSION

According to V. M. Platonov, the effectiveness of using group models for optimization and correction of the training process is especially high during young athletes' preparation, as well as adult athletes who have not reached the top of sports mastery [4]. In the future, the process of technical improvement can be effective only through the use of such models that allow to take into account and focus on individual biomechanical indices of a particular athlete's technique. For this purpose, we have developed regression biomechanical models of the technique of athletes specializing in javelin throwing. It

should be noted, however, that the process of using regression models on a range of promising athletes can be more effective with the constant cooperation of the coach with experts in the field of biomechanics, in the presence of training bases, training centers that meet international standards, equipped with up-to-date equipment, and diagnostic instrumentation.

## VI. CONCLUSIONS

Regression models of the javelin throwing technique have been developed. When solving the tasks of preparation, regression biomechanical models of motor actions represent a systemic factor that determines the structure and content of the process of improving the technical skills of skilled athletes. They allow predicting individual variants of technique oriented on achievement of the planned result, considerably facilitate the process of carrying out stage, current, and operative control, and enable differentiated assessment of technical fitness of skilled javelin throwers.

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