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EDITORIAL

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Maria José Tonelli
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Editor-adjunto

BINARISMS AND ITS DISCONTENTS

The theme of the next Academy of Management conference, to be held in 2020 in Vancouver, Canada, is "Broadening Our Sight" (Aguinis, 2019), which sounds quite fitting in today's times. Instead of regretting why business administration research does not always enjoy the same prestige as other areas [a subject well studied by Khurana (2007)], the call for papers for this conference expects researchers to abandon the zero-sum thinking present in the dichotomies that surround business administration research (e.g., dilemmas such as qualitative or quantitative research? Research on the micro, meso, or macro level?). The conference seeks contributions that go beyond this binary model, which is not quite useful for building synergies in the search for solutions. However, the issue is not just internal organizational problems. External problems such as political strategies, supply chain, and people management or forms of leadership—among many other topics addressed in business administration research—are definitely associated with management. Polarized positions do not contribute to creative solution of problems (but diversity and pluralism do), and the complexity of the contemporary scenario requires solutions that combine diverse areas of knowledge. The domain of business administration needs to reconcile the internal difficulties faced by companies with the political and social issues that surround them.

It seems we are always harping on the same string in our editorials. We have already addressed the need for a responsible science (Tonelli & Zambaldi, 2018a) that overcomes dichotomies (Tonelli & Zambaldi, 2016, 2018b) and is useful for a sustainable world. However, the latest editions of the Academy of Management dwell more or less upon a single subject: in 2019, the theme of the conference was "Understanding Inclusive Organizations"; in 2018, it was "Improving Lives"; and in 2017, it was "At the Interface," indicating the Association's penchant in recent years. The concern to produce knowledge for a better world has never been more pressing, either in the Global North or the Global South.

The articles in this issue contribute to this debate. "Humor as catalyst and neutralizer of leadership effectiveness" by Filipe Sobral, Liliane Furtado, and Gazi Islam deals with the impact of humor while leading interns. Yet, it can be perfectly extended to other professionals in organizations. The article "Happiness at work: Measurement scale validation" by Carolina Ramirez-Garcia, Juan García-Alvarez de Perea, and Julio García-Del Junco deals with the importance of measuring happiness at work for improving the efficiency of workers. In these times, when the future of work is being questioned, the theme of happiness is more than appropriate: is it really possible to be happy at work, today or in the future? What job is it? Highlighting the detachment of academic production from the immediate needs of society, an article by Anielson Barbosa da Silva discusses the "Multilevel academic productivism: Performative merchandise in Brazil's graduate schools of management" The article "Sustainable human resources management and social and environmental responsibility: An agenda for debate" by Andre Ofenhejm Mascarenhas and Allan Claudius Queiroz Barbosa deals with current and relevant issues, emphasizing the importance of the field of human resources adopting an agenda focused on socio-environmental responsibility.

Bringing this issue to an end is the essay " Marketing teaching and research: The red pill alternative" by Leticia Moreira Casotti, which shows the dichotomy that surrounds this area. In the Book Recommendations section, Professor Claudia Affonso Silva Araujo suggests five books on health services management.

Enjoy reading!

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HUMOR AS CATALYST AND NEUTRALIZER OF LEADERSHIP EFFECTIVENESS

Humor como catalisador e neutralizador da eficácia da liderança

Humor como catalizador y neutralizador de la eficacia del liderazgo

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ABSTRACT

This study examines the effects of (in)consistent leadership behaviors in promoting (or suppressing) relevant work outcomes for temporary employees such as interns. Specifically, to better understand the drivers of internship effectiveness, we hypothesized that supervisor humor interacts with leadership style, sending implicit messages about the organizational and supervisory relationship, thus shaping interns' attitudes and behaviors. Using a sample of 164 interns, we empirically examined the moderating effect of humor (affiliative and aggressive) on the relationship between leadership styles (transformational and laissez-faire), attitudes (satisfaction and stress), and behaviors (negligence and job acceptance intentions) using a two-wave research design. Our findings were consistent with the hypotheses, suggesting that humor needs to be tailored to leadership styles to predict interns' attitudinal and behavioral responses, with different types of humor interacting differently across leadership styles. Implications for further research are discussed.

KEYWORDS | Leadership styles, humor, inconsistency, ambivalence, internship.

RESUMO

Este estudo examina os efeitos da (in)consistência de comportamentos de liderança na promoção (ou supressão) de resultados do trabalho de trabalhadores temporários, como é o caso de estagiários. Especificamente, para melhor entender os impulsionadores da eficácia dos estágios, avaliamos em que medida o humor do supervisor interage com o seu estilo de liderança, por meio de mensagens implícitas sobre os códigos e relacionamentos organizacionais, moldando, assim, as atitudes e os comportamentos dos estagiários. Usando uma amostra de 164 estagiários, com dados coletados em duas ondas, examinamos empiricamente o efeito moderador do humor (afiliativo e agressivo) na relação entre estilos de liderança (transformacional e laissez-faire), atitudes (satisfação e estresse) e comportamentos (negligência e intenções de permanência). Os resultados foram consistentes com as hipóteses de pesquisa, sugerindo que o humor precisa ser consistente com os estilos de liderança para promover as respostas atitudinais e comportamentais adequadas, com diferentes tipos de humor interagindo de maneira diferente com os estilos de liderança. Implicações para futuras pesquisas são discutidas.

PALAVRAS-CHAVE */ Estilos de liderança, humor, inconsistência, ambivalência, estágios.*

RESUMEN

Este estudio examina los efectos de la (in)consistencia de comportamientos de liderazgo en la promoción (o supresión) de los resultados laborales de trabajadores temporales, como en el caso de los pasantes. En concreto, para entender mejor los impulsores de la eficacia de las pasantías, evaluamos en qué medida el humor del supervisor interactúa con su estilo de liderazgo, por medio de mensajes implícitos sobre los códigos y relaciones organizacionales, moldeando, así, la actitud y el comportamiento de los pasantes. Con una muestra de 164 pasantes, con datos recogidos en dos etapas, examinamos empíricamente el efecto moderador del humor (afiliativo y agresivo) en la relación entre estilos de liderazgo (transformacional y laissez-faire), actitudes (satisfacción y estrés) y comportamientos (negligencia e intenciones de permanencia). Los resultados fueron consistentes con las hipótesis de investigación y sugieren que el humor debe ser consistente con los estilos de liderazgo para promover las respuestas actitudinales y conductuales adecuadas, con diferentes tipos de humor que interactúen de manera diferente con los estilos de liderazgo. Asimismo, se discuten las implicaciones para futuras investigaciones.

PALABRAS CLAVE */ Estilos de liderazgo, humor, inconsecuencia, ambivalencia, pasantías.*

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INTRODUCTION

Organizations face a challenging business environment, marked by diversity, complexity, and constant disruptions (Siggelkow & Rivkin, 2005). In this context, leaders must make decisions knowing that uncertainty and ambiguity are the new normal. Humor has been considered a good remedy to cope with contradictions and tensions inherent to modern organizations, as it helps leaders manage business idiosyncrasies and ambiguities more positively (Hatch, 1997; Huang & Kuo, 2011). Indeed, a growing body of literature emphasizes the prominence of humor as a leadership tool in organizational settings (e.g., Avolio, Howell, & Sosik 1999; Robert & Wilbanks, 2012). Studies highlight the positive effects of humor on conducting interpersonal and group processes (e.g., Cooper, Kong, & Crossley, 2018; Robert, Dunne, & Iun, 2016; Robert & Wilbanks, 2012; Romero & Pescosolido, 2008), coping with emotional tension and stress (Arendt, 2009; Hughes, 2009; Lynch, 2009; Romero & Cruthirds, 2006), and mitigating the hierarchal power structure in organizations (George, 2013).

However, research shows that, sometimes, leaders' use of humor is inconsistent with their leadership style, that is, their adopted behavioral patterns to influence and motivate followers' behavior (Tremblay & Gibson, 2016; Vecchio, Justin, & Pearce, 2009). Such inconsistencies have important consequences on followers' attitudes and behaviors, since they expect leaders to act predictably and consistently (De Cremer, 2003; Mullen, Kelloway, & Teed, 2011). Thus, both leadership styles and humor are key to establishing supervisor-subordinate bonds in the workplace (Pundt & Herrmann, 2015), and when inconsistent with each other, they can trigger vexing mixed feelings and thoughts among followers that characterize ambivalence (Ashforth, Rogers, Pratt, & Pradies, 2014; Methot, Melwani, & Rothman, 2017).

Such ambivalent feelings are especially stronger for nonregular and precarious employees, such as interns. Interns are different from regular employees: they possess less self-efficacy and autonomy due to limited work experience (Wendlandt & Rochlen, 2008) and have ambiguous and often precarious career status (Rose, 2017). Consequently, interns are particularly susceptible to immediate supervisors directly responsible for introducing, accompanying, and guiding them throughout the internship period (Beenen, 2014; Kenny et al., 2015; Liu, Ferris, Xu, Weitz, & Perrewé, 2014; McHugh, 2017; Rose, Teo, & Connell, 2014). Research shows that leadership behaviors are instrumental in helping interns make sense of their new reality (D'Abate, Youndt, & Wenzel, 2009; Zhao & Liden, 2011) and clarify role expectations (Liu, Xu, & Weitz, 2011). In ambivalent situations, interns feel pulled in opposite directions, causing discomfort, disorientation, and apprehension. By impeding interns from making sense of the appropriate norms and building clear expectations, ambivalence may affect their propensity to commit to or disengage from the organization (Ashforth et al., 2014; Methot et al., 2017). However, we know little about how young, inexperienced, and precarious workers, such as interns, react to ambivalence triggered by leaders' inconsistent behaviors. Particularly, to our knowledge, empirical studies connecting these streams of research are rare in the Brazilian work context.

This study addresses this gap by exploring the combined effects of (in)consistent supervisors' leadership and humor styles on interns' experiences during the internship period. Through the ambivalence perspective (Ashforth et al., 2014), we argue that inconsistent leadership and humor styles elicit ambivalent feelings in interns about their work experiences, which motivates them to take action to reduce the resultant discomfort. Specifically, we test the interplay between humor styles (affiliative and aggressive) and leadership styles (transformational and laissez-faire) on interns' attitudes (satisfaction and stress) and behaviors (job acceptance intention and negligence). Overall, this study attempts to demonstrate that inconsistent signals from leaders undermine internship outcomes as they foster undesirable feelings and ambivalent experiences by interns.

LEADERSHIP AND THE USE OF HUMOR

Due to humor's relational and informational roles in interpersonal communication (Cooper et al., 2018; Pundt & Herrmann, 2015), humor is considered a crucial tool to help managers achieve their objectives (Cooper, 2008; Pundt, 2015; Tremblay & Gibson, 2016). In a recent empirical study with Brazilian executives, optimism and sense of humor were found to be two of the most relevant managerial competences of modern leaders (Sant'Anna, Campos, & Lótfi, 2012). Leaders seek humor, both contrived and spontaneous, to make sense of incongruities that inevitably exist in business settings (Hatch, 1997; Huang & Kuo, 2011). Further, humor is considered especially useful during organizational entry, when ideas, values, and tasks are shared massively and relationships are formed (Heiss & Carmack, 2012; Lynch, 2002; Sobral & Islam, 2015). Given humor's ability to stimulate rapid affective bonds (Robert & Wilbanks, 2012), leaders' use of humor may be particularly effective at early stages of employment or traineeship, condensing drawn-out relational processes between leaders and followers into rich momentary exchanges.

We define humor as a multifaceted construct reflecting a behavioral condition (i.e., expression of humor vs. a "sense" of

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humor) involving an intention to be amusing, either by verbal (jokes and witticisms) or non-verbal (visual and gestural) means (Cooper, 2005). Humor is thus fundamentally interpersonal, although not necessarily positive. Martin et al. (2003) distinguish four humor styles according to content (positive vs. negative) and target focus (self vs. others). Positive styles include affiliative and self-enhancing humor, while negative styles include aggressive and self-defeating humor. Since our study is interested mainly in the effects of leaders' humor directed toward interns, we focus only on other-directed humor, namely, affiliative and aggressive humor. Affiliative humor is a friendly type humor to build and enhance interpersonal relationships through funny stories, jokes, and witty comments, while aggressive humor involves irony, sarcasm, ridicule, and other demeaning humor toward others, representing the dark side of humor (Martin et al., 2003).

Among the different techniques available to leaders, affiliative humor allows establishment of interpersonal, affect-laden relationships with followers (Cooper, 2008; Hughes, 2009; Pundt & Herrmann, 2015; Robert et al., 2016) as well as communication of work-related information and expectations (Romero & Pescosolido, 2008). Affiliative humor helps promote interpersonal intimacy (Duncan, Smeltzer, & Leap, 1990) and reduce the salience of hierarchy (Romero & Cruthirds, 2006), thus fostering high-quality leader–follower relationships (Cooper, 2008; Pundt & Venz, 2017). The positive atmosphere promoted by humor may help explain its effects on creativity (Arendt, 2009), group productivity (Clouse & Spurgeon, 1995), and unit-level effectiveness (Avolio et al., 1999).

In addition, affiliative humor provides important information that may be unstated in formal rules or difficult to express directly (Adelswärd & Oberg, 1998). Some information may be difficult or tacit but can be disseminated imperceptibly and effectively through humor (Gruner, 1999), leading to, among other things, increased acceptance of leader messages (Greatbatch & Clark, 2003; Zepeda, Franco, & Preciado, 2014). This informational function of humor is critical for newcomers, as they use humor to interpret and assimilate job expectations and organizational culture and develop new affiliations (Heiss & Carmack, 2012).

In contrast to affiliative humor, aggressive humor is maladaptive, hurtful to others, and counterproductive for building and maintaining high-quality leader–follower exchange relationships (Pundt & Herrmann, 2015). This is because it increases perceived social distance between leaders and followers (Kim, Lee, & Wong, 2016). While affiliative humor sends positive messages about an organization, aggressive humor can be used to sabotage or undermine organizational objectives (Fleming & Spicer, 2002). Such humor, far from signaling a safe atmosphere, acts to vent dissatisfaction (Sturdy & Fineman, 2001), sending the opposite message to newcomers and increasing organizational anxiety and stress (Huo, Lam & Chen, 2012). Aggressive humor can also hurt unintentionally, as what supervisors find "funny" may be unintentionally hurtful. This indirectness differentiates negative humor from related yet distinct concepts such as abusive supervision (Tepper, 2000).

INCONSISTENT LEADERS AND AMBIVALENT INTERNS

Humor can be an important tool for leadership; however, research shows that sometimes using humor can be inconsistent with the leadership style, that is, the leaders' set of behaviors to provide direction and motivate followers (Avolio et al., 1999; Tremblay & Gibson, 2016). For example, a supervisor may display absent leadership style (laissez-faire), while adopting affiliative humorous communication. Conversely, a supervisor can adopt a more transformational relationship with interns but use an aggressive (and dark) form of humor. The polarized nature of leadership and humor styles, roughly categorized as constructive or offensive, makes inconsistencies between these behaviors more salient (Tremblay & Gibson, 2016; Vecchio et al., 2009).

Leaders' inconsistency is found to be harmful to both followers and organizations (Tremblay & Gibson, 2016). However, while desirable, consistency is somewhat challenging for leaders constantly confronted by multifaceted goals and required to balance contradictory demands and play multiple roles (Rothman et al., 2017).

When manifested by leaders, inconsistent behaviors are sources of subordinates' vexing mixed feelings that characterize ambivalence (Ashforth et al., 2014). Ambivalence refers to holding opposing affective/cognitive orientations toward another, such as loving and hating the same person, simultaneously. The experience of ambivalence tends to be aversive and dysfunctional (Ashforth et al., 2014; Methot et al., 2017), even if non-conscious, driving responses aimed at warding off these undesirable feelings.

The (in)consistency of leaders' behaviors is particularly important for predictions regarding leadership effectiveness, as ambivalence experienced by interns likely triggers attitudinal and behavioral reactions. That is, humor buffers or amplifies the effects of leadership styles, and these moderating effects differ according to the form of humor (Robert & Wilbanks, 2012). Similar to the literature noting positive–negative differences in affect-

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related phenomena (Watson, Clark & Tellegen, 1984), affiliative humor should act primarily on positive attitudes, while aggressive humor should be associated with strain-related and negative attitudes. Specifically, we hypothesize that affiliative humor works mainly by interacting with leadership styles to augment positive intern attitudes (i.e., internship satisfaction), while offensive and aggressive humor interacts with leadership styles to increase anxiety-related negative attitudes (i.e., stress).

HYPOTHESES DEVELOPMENT

Transformational leadership and humor

Transformational leaders act as mentors and role models for employees, encouraging subordinates to transcend individual aspirations for the organization (Judge & Piccolo, 2004). Transformational leadership helps interns experience lower stress and increased satisfaction (Baranik, Roling & Eby, 2010; D'Abate et al., 2009), making them more likely to continue working for the organization after the internship ends (Beenen & Rousseau, 2010).

Affiliative humor should be consistent and aligned with transformational leadership, because transformational leaders develop affective bonds with followers (see Ng, 2017, for a meta-analysis). Using affiliative humor, supervisors consistently reinforce positive bonds and identification that help establish transformational relationships (Pundt & Herrmann, 2015; Terrion & Ashforth, 2002). Moreover, by creating a positive working environment, affiliative humor facilitates supervisor–intern interactions (Kim et al., 2016), making transformational behaviors even more impactful. Thus, being a constructive form of exerting leadership, affiliative humor should augment the effects of transformational leadership on internship outcomes.

Conversely, aggressive humor may undo the effects of transformational leadership. While transformational supervisors foster emotional dependence and trust in interns (Kark, Shamir, & Chen, 2003), mocking or aggressive humor undermines trust and positive relationships. Such inconsistent behaviors create uncertainty regarding supervisors' intentions and trustworthiness (Tremblay & Gibson, 2016). Accordingly, a mixture of constructive leadership and offensive humor inculcates in interns a sense of being simultaneously attracted to and repulsed by supervisors, thus fostering ambivalent feelings toward them (Ashforth et al., 2014). This ambivalent condition is stressful and aversive for employees (Uchino et al., 2012); it is more likely to affect vulnerable groups such as interns, thus leading to negative outcomes.

H1a. Consistency between transformational leadership and affiliative humor augments transformational leaders' positive effects on satisfaction, leading to more positive outcomes (lower neglect and higher job acceptance intentions).

H1b. Inconsistency between transformational leadership and aggressive humor neutralizes transformational leaders' stress reduction effects, leading to more negative outcomes (greater neglect and lower job acceptance intentions).

Laissez-faire leadership and humor

While transformational leaders provide a vision for followers, laissez-faire leadership can be a detached leadership style where leaders evade responsibilities, fail to assist followers, and hesitate to take positions on important issues (Bass, 1985). Laissez-faire behaviors are likely to be detrimental to intern learning, causing stress (Vullinghs, De Hoogh, Den Hartog, & Boon, 2018), dissatisfaction, and negative responses toward their jobs (Beenen & Rousseau, 2010; Liu et al., 2011; Sosik & Godshalk, 2000). These effects are driven by a lack of direction under laissez-faire leaders, which fails to fulfill interns' psychosocial needs and undermines trust (Sosik & Godshalk, 2000).

Affiliative humor by a laissez-faire supervisor reflects inconsistency, since positive affective signals in the negative leadership relationship context seem contradictory and conflicting (Tremblay & Gibson, 2016). Therefore, by mixing an unsupportive leadership style with affiliative humor, supervisors contribute to emergence of interns' ambivalent feelings and, consequently, reduction of satisfaction.

However, use of aggressive humor by laissez-faire supervisors is likely to be seen as consistent and predictable by interns (Uchino et al., 2012). Both the laissez-faire style and aggressive humor indicate disinterest in subordinates (Cooper, 2008) and likely reinforce each other's effects on the supervisor–intern relationship. That is, aggressive humor likely diminishes the leaders' credibility further. In this scenario, such humor may be especially bad, promoting decidedly negative attitudes in interns and affecting their subsequent commitment to the organization.

H2a. Inconsistency between laissez-faire leadership and affiliative humor reinforces laissez-faire leaders' negative effects on satisfaction, leading to more negative outcomes (greater neglect and lower job acceptance intentions).

H2b. Consistency between laissez-faire leadership and aggressive humor reinforces laissez-faire leaders' stress generation effects, leading to more negative outcomes (greater neglect and lower job acceptance intentions).

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METHODS

Sample and procedure

Participants were recruited from career centers and internship programs of a major Brazilian private university in Rio de Janeiro, Brazil. Brazil has the advantage of an extensive history of internships in higher education, typically involving students on sponsored projects during their final years before graduation. In Brazil, internships are regulated federally by the Internship Act (Law no. 11.788, September 25, 2008) and require formal academic oversight.

The study was designed as a two-wave survey with a two-week time lag. Invitations containing a cover letter explaining the research purpose, instructions, and link to the survey were sent through email. In the first wave (*T1*), participants rated their supervisors on leadership style and humor use. In the second wave (*T2*), participants rated both mediators (satisfaction and stress) and dependent variables (job acceptance intentions and negligent behaviors). As an incentive, students were offered lottery tickets for a prize distributed subsequently. However, these were not forfeited if participants desisted from the study, and the study's voluntary and anonymous nature was emphasized to encourage candid responses and reduce social desirability bias.

In all, 164 interns completed both questionnaire waves. Students were on average 22 years old; 55% were female, 73% were in their final year of graduation, and most were business majors (42%). Approximately 54% of participants had male supervisors during the internship.

Measures

Leadership style

Supervisor leadership style was measured using the Multifactor Leadership Questionnaire Form 5X (MLQ-5X) (Bass & Avolio, 1990). We selected four items to represent transformational leadership subscales' core dimensions: idealized influence or charisma ("my direct supervisor talks optimistically about the future"), inspirational leadership ("my direct supervisor provides a vision of what lies ahead"), intellectual stimulation ("my direct supervisor provides reasons to change my way of thinking about problems"), and individualized consideration ("my direct supervisor spends time teaching and coaching me"). Laissez-faire leadership was assessed by four items (e.g., "my direct supervisor is likely to be absent when I need him/her"). Interns rated how frequently their supervisor engaged in each behavior on a five-point scale, ranging from 1 (not at all) to 5 (frequently, if not always). The reliability of these two leadership scales was 0.81 and 0.72, respectively.

Humor

Supervisors' humor was measured using subscales for affiliative and aggressive humor from the Humor Styles Questionnaire (Martin et al., 2003). Respondents rated the frequency of a set of leader's behaviors on a five-point scale, ranging from 1 (never or very seldom) to 5 (very often). A sample item for the affiliative humor scale is, "My supervisor enjoys making people laugh," while that for aggressive humor scale is "If someone makes a mistake, my supervisor will often tease them about it." The affiliative and aggressive humor scales' reliability was 0.83 and 0.91, respectively.

Internship satisfaction

Intern satisfaction was measured with a six-item scale derived from Brayfield and Rothe's (1951) Job Satisfaction Index using a five-point Likert-type scale, ranging from 1 (strongly disagree) to 5 (strongly agree). Some examples of the items are "I feel fairly satisfied with my internship" and "I feel that I am happier with my internship than most people." The scale's reliability was 0.89.

Job stress

Intern stress was assessed with a five-item scale adapted from Ivancevich and Matteson's (1980) Stress Diagnostic Survey using a five-point Likert-type scale, ranging from 1 (strongly disagree) to 5 (strongly agree). We selected items to represent the scale's core dimensions: role ambiguity, role conflict, quantitative and qualitative role overload, and career development concerns. Some examples of the items are "My job duties and work objectives are unclear to me" and "I work on unnecessary tasks and projects." The scale's reliability was 0.85.

Job acceptance intentions and negligent behavior

Intention to be permanently hired by the host company and negligent behaviors were both measured with three-item scales adapted from Leck and Saunders (1992). Participants were asked to indicate on a five-point scale, ranging from 1 (strongly disagree) to 5 (strongly agree), how strongly they agree with various behaviors at work. Examples of items included are "I wish to be formally employed by this organization after finishing my internship" and "I put in less effort in my work than I know I can." The job acceptance intention and negligent behavior scales' reliability was 0.86 and 0.73, respectively.

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Controls

We controlled for transactional leadership because it builds upon already established transactional relations. Thus, it was necessary to control for contingent reward leadership to exclude the possibility that the effects could be attributed to the supervisor–intern relationship's transactional exchange nature. Four items measured the contingent reward leadership (e.g., "my direct supervisor points out what I will receive if I do what needs to be done") on a five-point scale, and the reliability was 0.72. Additionally, we statistically controlled for prototypical and antiprototypical leadership behaviors using Epitropaki and Martin's (2004) implicit leadership theories scale, containing 21 prototypical (e.g., energetic) and antiprototypical (e.g., selfish) leader characteristics. Participants rated their supervisors on each trait with a five-point scale, from 1 (extremely uncharacteristic) to 5 (extremely characteristic).

RESULTS

To verify the discriminant validity of our measures, we conducted a series of confirmatory factor analyses. First, we estimated fit indices of two baseline measurement models: (1) a four-factor model for the antecedents (variables measured at *T1*) and (2) a four-factor model for mediators and outcomes (variables measured at *T2*). Results showed a good model fit for both models: (1) $x2(160) = 260.3$, $p < 0.001$; comparative fit index (CFI) = 0.94; root mean square error of approximation (RMSEA) = 0.062; and (2) $x2(129) = 221.1$, $p < 0.001$; CFI = 0.94; RMSEA = 0.066. Second, we contrasted these two models' fit against that of alternative models. Baseline models showed a significantly better fit than alternative measurement models did, thus confirming that our measures are adequate to capture the intended constructs.

Table 1 presents means, standard deviations, and correlations among the key constructs. Results indicate the relative lack of association between leader antiprototypical behavior and all models' constructs. Based on Becker's (2015) recommendations that inclusion of superfluous controls may yield biased estimates and reduce statistical power, we decided to exclude this variable from further analyses.

Our proposed model suggests an indirect effects model, whereby the relationship between leadership styles and behavioral outcomes is transmitted through satisfaction and stress. Table 2 summarizes the mediation models' regression coefficients.

Table 1. **Means, standard deviations, correlations, and reliabilities**

Variables	Mean	s.d.	1	2	3	4	5	6	7	8	9	10	11
1.Transformational leadership	3.86	0.86	**0.81**										
2. Transactional leadership	3.39	0.78	0.76	**0.72**									
3. Laissez-faire leadership	2.30	0.78	-0.51	-0.42	**0.71**								
4. Affiliative humor	3.45	0.93	0.55	0.57	-0.27	**0.83**							
5. Aggressive humor	1.35	0.75	-0.55	-0.41	0.47	-0.20	**0.91**						
6. Internship satisfaction	3.59	0.88	0.65	0.54	-0.40	0.40	-0.31	**0.89**					
7. Job stress	2.29	0.89	-0.65	-0.60	0.56	-0.43	0.47	-0.64	**0.85**				
8. Negligent behavior	1.99	0.87	-0.35	-0.27	0.36	-0.16	0.07	-0.37	0.42	**0.73**			
9. Intention to stay	3.60	1.25	0.38	0.30	-0.34	0.17	-0.19	0.61	-0.48	-0.33	**0.86**		
10. Leader prototypical behavior	4.29	0.47	0.50	0.44	-0.36	0.29	-0.29	0.43	-0.33	-0.28	0.29	**0.78**	
11. Leader antiprototypical behavior	2.17	0.55	0.01	0.07	-0.01	0.05	0.05	-0.08	0.13	0.15	-0.08	0.07	**0.47**

Note: n = 164
Alpha coefficients are in the diagonals.

Table 2. **Regression analyses for mediation models**

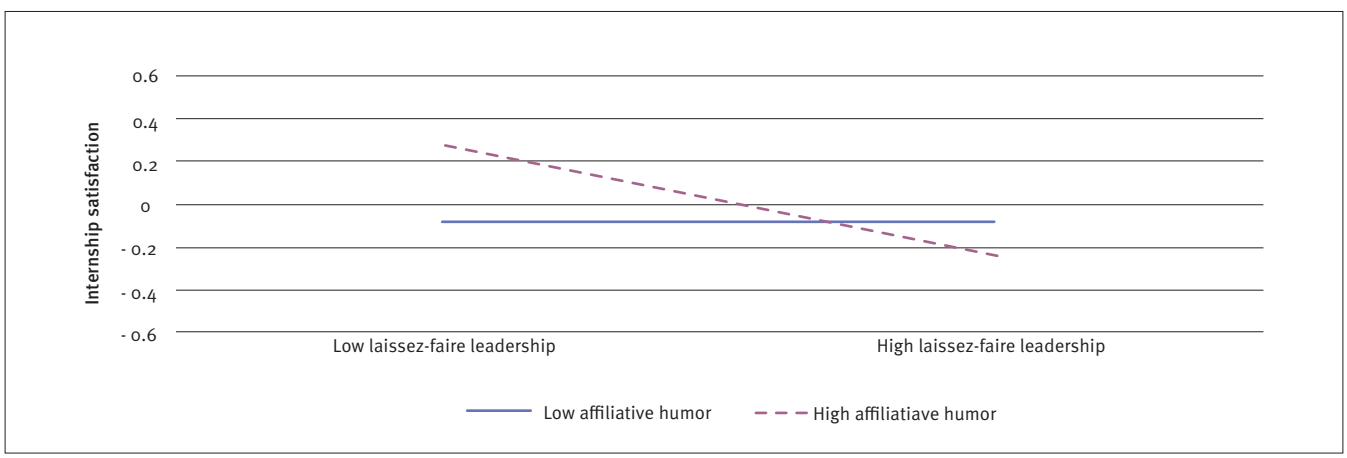
	Internship satisfaction	Job stress	Job acceptance intentions		Negligent behaviors	
			Step 1	Step 2	Step 1	Step 2
Controls						
Leader prototypical behavior	0.12+	0.05	0.10	0.04	-0.12	-0.11
Contingent reward leadership	0.10	-0.25**	-0.01	-0.10	0.03	0.10
Main predictors						
Transformational leadership	0.47**	-0.33**	0.21+	-0.10	-0.19	-0.05
Laissez-faire leadership	-0.08	0.30**	-0.25**	-.16*	0.24**	0.16+
Mediators						
Internship satisfaction				0.54**		-0.13
Job stress				-0.15		0.23*
F test	31.88**	42.99**	10.13**	18.07**	8.61**	7.61**
R^2	0.45	0.52	0.20	0.41	0.18	0.23
Adjusted R^2	0.43	0.51	0.18	0.39	0.16	0.20

Note: n = 164 participants
p< 0.01; * p <0.05; + p <0.10
All coefficients are standardized and numbers are rounded to two decimal places.

Results show that transformational leadership is positively associated with internship satisfaction (b = 0.47, p < 0.01) and negatively with stress (b = -0.33, p < 0.01), while laissez-faire leadership is positively associated with stress (b = 0.30, p < 0.01) but not with satisfaction (b = -0.08, p > 0.10). Moreover, satisfaction is positively and significantly related to job acceptance intentions (b = 0.54, p < 0.01) but not with negligent behaviors at work (b = -0.15, p > 0.10). Contrariwise, a significant link was found between stress and negligent behaviors during the internship (b = 0.23, p < 0.05), but not between stress and job acceptance intentions (b = -0.13, p > 0.10).

Concerning H1a and H2a, we predicted that supervisors' use of affiliative humor moderates the relationship between leadership style and interns' satisfaction. Consistent with H2a, we found a negative interaction of affiliative humor by laissez-faire leadership (b = -0.13, p < 0.05). We then plotted simple slopes at one standard deviation above and below the moderator's mean to better understand this interaction effect (Graph 1). Consistent with our expectations, and supporting H2a, the slope was relatively strong (and negative) for high affiliative humor (simple slope = -0.26, p < 0.05) but non-significant for low affiliative humor (simple slope = 0.00, p > 0.10). Considering the non-significant effect of laissez-faire leadership behavior and interns' satisfaction, this finding suggests that supervisors' use of affiliative humor not only enhances (as predicted) but may also activate laissez-faire leadership's negative impact on internship satisfaction.

Graph 1. **Internship satisfaction predicted by laissez-faire leadership moderated by affiliative humor**



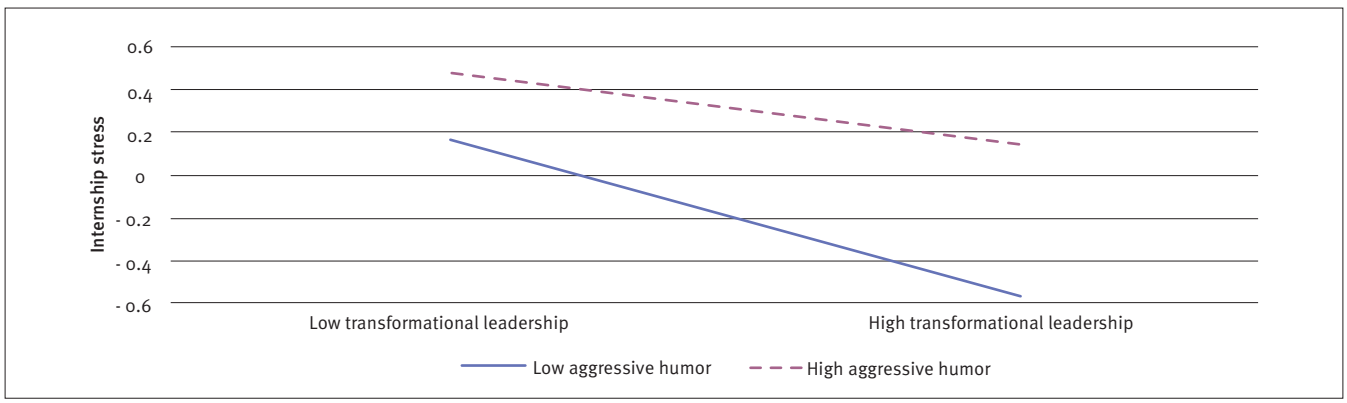
Note: Slopes at one standard deviation above the mean and one standard deviation below the mean.

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However, the interaction between affiliative humor and transformational leadership on satisfaction yielded a non-significant relationship (b = 0.08, p › 0.10), meaning that using constructive humor does not enhance the effect of transformational leadership, providing no support for H1a. That is, leaders' behavioral consistency does not have cumulative effects on interns' satisfaction.

Regarding aggressive humor's moderating role, H1b and H2b predicted that use of offensive humor interacts with supervisor leadership style, neutralizing the stress reduction effects of transformational leadership behaviors and enhancing the positive effect of laissez-faire leadership on stress. Results confirmed that the interaction between aggressive humor and transformational leadership on interns' stress is positive and significant (b = 0.10, p ‹ 0.05), supporting H1b that aggressive humor attenuates the effect of transformational leadership behaviors on stress. By plotting this moderation effect (Graph 2), we conclude that the relationship between transformational leadership and stress is non-significant for high aggressive humor (simple slope = -0.16, p › 0.10), whereas the slope is relatively strong (and negative) for low aggressive humor (simple slope = -0.37, p ‹ 0.01). This finding suggests that if supervisors use offensive humor in their communication, transformational leadership behaviors do not reduce stress, whereas if they do not use sarcasm or mockery in their communication, it significantly impacts stress reduction.

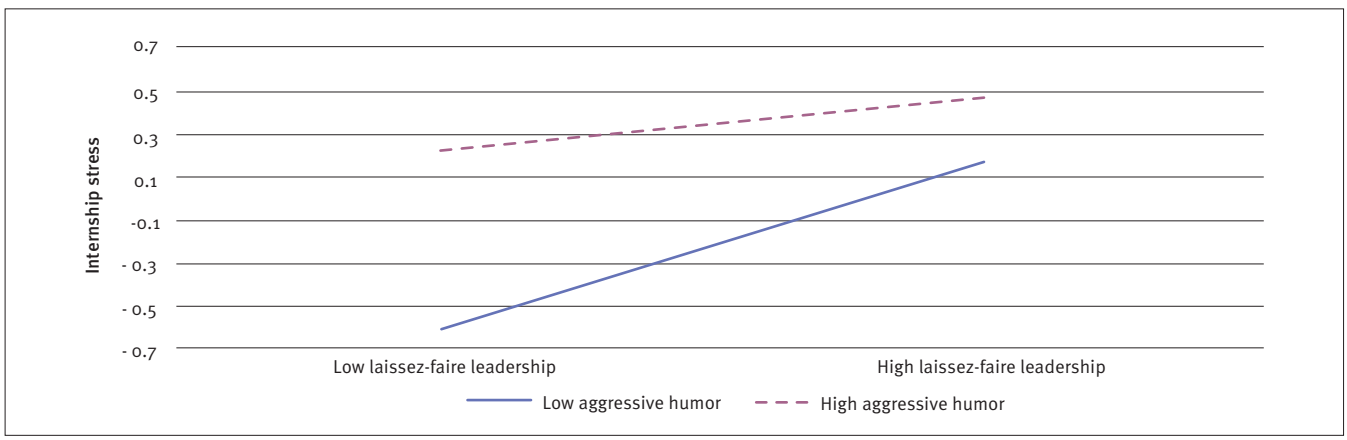
Graph 2. **Stress predicted by transformational leadership moderated by aggressive humor**



Note: Slopes at one standard deviation above the mean and one standard deviation below the mean.

Results also show the negative interaction of aggressive humor by laissez-faire leadership (b = -0.13, p‹ 0.05), which is corroborated by the relationship slopes between laissez-faire leadership and stress for high (simple slope =0.12, p › 0.10) and low (simple slope = 0.39, p ‹ 0.01) aggressive humor, as shown in Graph 3. Contrary to our prediction, this finding suggests that supervisors' use of aggressive humor may neutralize, and not amplify as predicted, the negative impact of laissez-faire leadership on interns' stress.

Graph 3. **Stress predicted by laissez-faire leadership moderated by aggressive humor**



Note: Slopes at one standard deviation above the mean and one standard deviation below the mean.

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Furthermore, we predicted that supervisors' humor (affiliative and aggressive) moderates (indirectly, through stress and satisfaction) the impact of leadership styles on interns' behaviors (negligence and job acceptance intentions)—this has been termed the conditional indirect effect or moderated mediation (Preacher, Rucker, & Hayes, 2007). To test such effects' significance, we used the recommended bootstrapping procedures to analyze the conditional indirect effects on outcome variables at different values of the moderator variable. Specifically, we examined the conditional indirect effect of contingent reward and laissez-faire leadership on job acceptance intentions (through satisfaction) at different values of affiliative humor. We also examined the conditional effect of transformational and laissez-faire leadership on negligent behaviors (through stress) at different values of aggressive humor.

Results (Table 3) show that the indirect effect of laissez-faire leadership on the intention to stay, mediated through satisfaction, was only significantly different from zero for affiliative humor values at one standard deviation above the mean (b = -0.15; 95% bootstrap confidence interval [CI] = -0.277 to -0.059). Moreover, the transformational leadership's indirect effect on negligent behaviors (through stress) was statistically non-significant only for high aggressive humor at one standard deviation above the mean (b = -0.05; 95% bootstrap CI = -0.145 to 0.004). This suggests that transformational leadership's negligence-reducing effects are annulled when supervisors use aggressive humor, although no evidence was found that affiliative humor increases transformational leadership effects. Similarly, the indirect effect of laissez-faire leadership on interns' negligent behaviors was found to be positive for low and moderate use of aggressive humor (b = 0.11 and b = 0.07, respectively), but not for high use of aggressive humor (b = 0.04; 95% bootstrap CI = -0.012 to 0.118). This finding suggests that while laissez-faire leadership generally impacts negligent behaviors at work, this effect is mitigated when coupled with aggressive humor.

Table 3. **Bootstrapped estimates of conditional indirect effects**

Predictor	Mediator	Outcome	Moderator		Effect	SE	LL 95%	UL 95%
Laissez-faire leadership	Internship satisfaction	Job acceptance intentions	Affiliative humor	-1 SD	0.00	0.06	-0.135	0.117
				M	-0.08	0.04	-0.171	0.002
				+1 SD	**-0.15**	**0.05**	**-0.277**	**-0.059**
Transformational leadership	Job stress	Negligent behaviors	Aggressive humor	**-1 SD**	**-0.11**	**0.06**	**-0.267**	**-0.033**
				M	**-0.08**	**0.04**	**-0.203**	**-0.023**
				+1 SD	-0.05	0.04	-0.145	0.004
Laissez-faire leadership	Job stress	Negligent behaviors	Aggressive humor	**-1 SD**	**0.11**	**0.05**	**0.034**	**0.248**
				M	**0.07**	**0.03**	**0.024**	**0.162**
				+1 SD	0.04	0.03	-0.012	0.118

Note: n = 164 participants
All coefficients are standardized and numbers are rounded to two decimal places.
1,000 bootstrap samples
-1 SD/ +1 SD = one standard deviation below the mean / one standard deviation above the mean
M = Mean
LL = lower limit confidence interval
UL = upper limit confidence interval

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DISCUSSION

The present study explored the effect of supervisors' behavioral (in)consistency on internship effectiveness. Overall, our study shows that inconsistency across leadership behaviors (e.g., transformational leadership and aggressive humor) is detrimental to internship outcomes. Our findings provide support for the argument that the simultaneous experience of two contradictory behaviors from supervisors that signal both approach and avoidance will trigger negative experiences and negative behavioral reactions (Ashforth et al., 2014). Although past studies provide evidence that supervisors' leadership styles are positively associated with internship outcomes (e.g., Newman, Rose, & Teo, 2016), such relationships may be more complex than expected.

Accordingly, our findings suggest that while affiliative humor does not affect transformational leadership relationships (consistent behaviors), its negative impact on stress is neutralized when supervisors use aggressive humor (inconsistent behaviors). Further, use of affiliative humor may aggravate avoidance behaviors associated with the laissez-faire style. Interns may judge the use of humor (although positive) as abusive and inconsistent with their leaders' behaviors (i.e., instead of the needed guidance, they receive only empty jokes). This aggravating effect does not occur with aggressive humor, as the effect of laissez-faire leadership on interns' stress is neutralized by the use of negative humor.

Consistent with our results, past research also provides evidence that inconsistent behaviors have larger damaging effects than consistent ones (e.g., Nahum-Shani, Henderson, Lim, & Vinokur, 2014). One possibility for this asymmetry may involve the feeling of ambivalence that could emerge when interns perceive inconsistency in supervisory behaviors (Ashforth et al., 2014). Such inconsistency, which signals opposite orientations to interns leads to experience of disorientation that characterizes ambivalence (e.g., transformational leaders who use aggressive humor signal to interns that they are simultaneously cared for and disregarded). When made salient, ambivalence gives rise to psychological discomfort and negative responses toward the target of ambivalence (Ashforth et al., 2014; Rothman et al., 2017). However, when supervisors behave in a consistent manner, they can prevent the emergence of ambivalence and the negative responses to it (Ashforth et al., 2014).

In sum, our results evidence that when a supervisor makes a consistent combination of leadership behaviors and use of humor, it ensures that the outcomes stemming from leadership behaviors are positive and fruitful, but when humor is not perceived as consistent for a certain leadership style, it impairs interns' attitudes and outcomes. We thus contribute to the leadership literature by revealing that supervisors' (in) consistency is especially relevant for the development of interns' work attitudes, behaviors, and intentions to be permanently hired by the host company. Overall, our findings contribute by showing that leadership styles affect intern outcomes, but often do so through indirect and contingent pathways that may obscure direct effects. In addition, our findings reinforce our central message that the interplay of leadership and humor styles is of key interest in understanding interns' behavioral reactions.

MANAGERIAL IMPLICATIONS

Our findings have some practical implications that need to be highlighted. First, our study contributes to the design and management of internship programs by stressing the role of leadership practices. If organizations want to leverage internships as a screening tool for recruitment purposes, they need to be aware of how managerial behaviors can impact interns' attitudes and intentions toward the host company.

Further, our results can help leaders understand that, while humor is a powerful workplace technique to lead interns, all humor forms are not similar. Leaders should emphasize the right form of humor in their communication with interns. Particularly, supervisors should be especially diligent in seeking consistency between communication styles and leadership behaviors.

LIMITATIONS AND FUTURE RESEARCH

Some limitations to this study must be acknowledged. Methodologically, we took multiple precautions around the single-source data (Podsakoff, MacKenzie, & Podsakoff, 2012). Besides the two-wave design to reduce the likelihood of common method bias, we controlled for prototypical leadership behavior to exclude the chance that the differential effects of leadership styles could be attributed solely to supervisors' prototypical characteristics. Moreover, since the focus of our study was interaction effects and not direct effects, this common method concern is less problematic. In fact, the presence of common methods bias is shown to reduce interaction estimates, leading to more conservative effects (Siemsen, Roth, & Oliveira, 2010).

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Second, our sample came from a relatively upper-class private school population in Brazil, a country known for wide economic disparity. On one hand, because Latin American samples are relatively rare in the organizational literature, our study represents an understudied group, thus contributing to undoing geographical biases in research; on the other hand, our sample is not representative of majority of Brazilians, who may face very different workplace challenges. Future research should thus look at interns from across the socio-economic spectrum.

Finally, our study relies on a broad and general theory of humor for explaining its effects on interns' attitudes and behaviors. However, we acknowledge the role of the cultural context in defining nationally or regionally distinctive styles of humor. In this sense, as Osland, De Franco, and Osland (2007) highlight, Latin American work settings are marked by a specific sense of humor and fun. Consequently, future investigations should take an indigenous approach to study humor in the Brazilian context.

Despite these limitations, the current research suggests that the use of humor interacts in complex ways with leadership styles, producing a range of moderating effects. Ultimately, these effects result in relevant employee outcomes that are important for organizations' success. Particularly, in Brazil, where studies bridging these two streams of research are lacking, our study highlights the importance of the relationship between humor and leadership, and it deserves further attention in future research.

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HAPPINESS AT WORK: MEASUREMENT SCALE VALIDATION

Felicidade no trabalho: Validação de uma escala de medição

La felicidad en el trabajo: Validación de una escala de medida

ABSTRACT

Workers' happiness is a determining factor for both their short- and long-term efficiency. While several scholars have attempted to develop happiness measurement frameworks, this study analyzes the validity of a scale proposed by Del Junco, Espasandín, Dutschke, and Palacios (2013) in which factors determining worker happiness are elucidated and examined. The study offers a guide for validating scales using a structural and confirmatory approach on the basis of data derived from 262 companies in the Spanish province of Seville. The scale examines two dimensions—factors related to the job and to the worker—that confirm the need to combine both individual and environmental perspectives when analyzing worker happiness.

KEYWORDS | Happiness at work, scale validation, exploratory factor analysis, confirmatory factor analysis, structural equations

RESUMO

A felicidade do trabalhador é um fator determinante de sua eficiência em curto e longo prazos. Na literatura, encontramos tentativas de medir a felicidade. O presente trabalho faz a análise da validade de uma escala proposta por Del Junco, Espasandín, Dutschke e Palacios (2013) na qual fatores que determinam a felicidade do trabalhador estão expostos. O trabalho fornece um guia para a validação de escalas com uma abordagem estrutural e confirmatória, com base em dados de 262 empresas na província de Sevilha (Espanha). Da mesma forma, a escala mostra duas dimensões (fatores relacionados ao trabalho e fatores relacionados ao trabalhador) que confirmam a necessidade de combinar a perspectiva do indivíduo e do ambiente ao analisar a felicidade no trabalho.

PALAVRAS-CHAVE */ Felicidade no trabalho, validação de escalas, análise fatorial exploratória, análise fatorial confirmatória, equações estruturais.*

RESUMEN

La felicidad del trabajador es un factor determinante de su eficiencia a corto y a largo plazo. En la literatura encontramos intentos de medir dicha felicidad directamente, y otros centrados en conocer cuáles son los elementos que generan esta felicidad. El presente trabajo realiza el análisis de validez de una escala propuesta por Del Junco, Espasandín, Dutschke y Palacios (2013) en la que se exponen factores determinantes de la felicidad del trabajador. El trabajo aporta una guía para la validación de escalas con un enfoque estructural y confirmatorio, basada en los datos de 262 empresas de la provincia de Sevilla (España). Asimismo, la escala muestra dos dimensiones (factores relacionados con el puesto de trabajo y factores relacionados con el trabajador) que confirman la necesidad de combinar la perspectiva del individuo y del entorno a la hora de analizar la felicidad laboral.

PALABRAS CLAVE */ Felicidad en el trabajo, validación de escalas, análisis factorial exploratorio, análisis factorial confirmatorio, ecuaciones estructurales.*

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INTRODUCTION

What makes workers happy? This issue has been approached by researchers from a diverse number of fields, including philosophy, literature, psychology, sociology, and anthropology. However, the question has only recently arisen as a topic of research in the field of business administration. We are discussing a concept that cannot be uniquely defined: there is no universally agreed cause for it, since it results from a combination of multiple factors, such as genetics, personal traits, gender, and education level. (Heller, Judge, & Watson, 2002; Peterson, Park, Hall & Seligman, 2009).

The multidimensional nature of happiness has been established clearly in prior literature on the subject, such as in the work of Fisher (2014) and Rothmann (2013). While the hedonic and eudaimonic visions have mainly been used in initial studies of happiness across different spheres, the concept of *flourishment* (Diener et al., 2010) is currently being used to search for the origin of the inner well-being and mental health that serves as a base for happiness. Defining and influencing the perception of happiness represents a complex task. Alongside works dedicated to measuring happiness, further studies have also focused on analyzing the antecedents of happiness. These are factors that lead a worker into a situation requiring welfare.

Given the vast amount of time dedicated to work, job happiness constitutes a fundamental component for developing personal well-being and happiness (Fisher, 2014; Paschoal & Tamayo, 2008). Prior studies have recognized that work contributes less to a person's overall happiness compared with other factors, such as an individual's life partner, family, leisure, or friends. However, it does hold a proven amount of potential for increasing unhappiness (Argyle, 1992). Thus, positive psychology, centered on the study of well-being and personal happiness as positive emotions, has experienced an explosion in the field of happiness at work (Fisher, 2010, Luthans, 2002, Seligman & Csikszentmihalyi, 2000).

After conducting a series of interviews with Spanish and Portuguese workers, Del Junco Espasandín, Dutschke, and Palacios (2013) developed a scale of measurement in the field of happiness at work. Echoing the lack of studies on happiness at work in the field of management, the authors sought to propose an accessible and useful instrument for a manager to implement in his/her day-to-day management. This study provides this questionnaire to 262 companies and describes the processes of validation and data cleansing, while also using factor analysis to determine the underlying dimensions of scale and quality of fit of the measure concerning the real data of the construct requiring assessment.

The remainder of the paper is structured as follows: First, the process of the conceptualization of the term happiness in this work is described, revising models suggested by both previous studies and antecedents of happiness at work. Following this, different pieces of validity evidence from the questionnaire proposed by Del Junco et al. (2013) are analyzed. After describing the methodology, the main results of the analysis will then be shown and discussed. Finally, the main conclusions and the limitations and avenues for potential future research are presented.

Literature review

Since the definition of happiness depends on the approach taken by authors in their work (Kiesebir & Diener, 2008; Veenhoven, 1991), several researchers use the term “subjective well-being” (Zelenski, Murphy, & Jenkins, 2008). However, this "well-being" has also been recognized as a component of happiness, which encompasses a richer, broader, and more complex set of ideas (Diener, 2000; Diener, Suh, Lucas & Smith, 1999; Massaro, 2013). Abundant works have concluded that happiness arises from a subjective measure made by each individual regarding their life's achievements (Diener, Sandvik, & Pavot, 1991).

Happiness is conceived from a double perspective: (a) the hedonic vision, according to which happiness will be determined by pleasure, the accumulated experience of affections obtained, which is centered mainly on what the person is feeling; and (b) the eudaimonic perspective, according to which happiness represents the degree to which internal coherence and personal fulfillment are achieved, an expression of an individual's potential capacity (Daniels, 2000; Ferreira, Silva, Fernandes, & Almeida, 2008; Fisher, 2014; Van Horn, Taris, Schaufeli, & Scheurs, 2004; Ryan & Deci, 2001). While, from a hedonistic point of view, happiness is compatible with a life of superficial values, greed, and the exploitation of others, the eudaimonic perspective focuses on the content of one's life and the processes involved in "functioning well" rather than "feeling good" (Rothmann, 2013). The distinction between these two ideas is such that it has been argued that hedonistic happiness is unsustainable in the long term in the absence of eudaimonic well-being (Fisher, 2010).

The hedonistic and eudaimonic duality is complemented by social welfare (Fisher, 2014). In addition, the concept of flourishing, understood as the experience of a life that “goes well”, has been developed to describe a combination of feeling good and functioning effectively (Huppert and So, 2013). According to Diener, the flourishing approach involves having a purpose in life,

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positive relationships, engagement, competence, self-esteem, optimism, and a feeling that an individual is contributing towards the well-being of others (Diener et al. 2010). It has been argued that if a continuum in mental health was established spanning both complete health (flourishing) and a lack of mental health (languishing), the position of people on that continuum could be determined using their scores regarding three types of well-being (emotional, psychological, and social) (Keyes, 2000). To achieve this flourishing, Huppert and So (2013) have differentiated ten individual characteristics (competence, emotional stability, engagement, meaning, optimism, positive emotion, positive relationships, resilience, self-esteem, and vitality), to aggregate both the hedonic and eudaimonic aspects. Finally, Keyes (2002) has also concretized this concept of mental health into a set of symptoms of positive feelings and positive functioning in life.

Happiness at work represents an issue of great importance because most human beings work out of both necessity and desire: It is a source of income and also offers an opportunity to implement personal abilities and skills, face challenges, and achieve personal fulfillment (Moyano Díaz, Castillo Guevara, & Lizana Lizana, 2008). This is true to such an extent that people who like their jobs would choose not leave them, even if they no longer needed the money (Argyle, 1992). According to Suh and Koo (2008), labor happiness can be analyzed at a number of levels, including the level of the global scope of the worker, the organizational or business level, and at work level. In this context, most existing studies have focused on the perspective of the worker (Groot & Maassen van den Brink, 1999), especially the group or environment in which they operate (Baker, Greenberg & Hemingway, 2006). Likewise, this analysis can also be performed considering the worker as an individual who supports mental processes (Judge et al., 2002), or by focusing on the weight of the "environment" on the level of happiness experienced by the worker (Warr, 2013). Finally, a third differentiated approach has also distinguished studies that measure the happiness/well-being of the workers themselves, from those who analyze the factors that lead to that perception of happiness.

There are a variety of constructs among the different measures of happiness at work. Job satisfaction is the most common one, although we can find others, such as individual commitment, organizational commitment, work involvement, intrinsic motivation, drive and value, work affection, and resilience (Fisher, 2010). However, none of these factors hold the ability to individually measure happiness levels at work alone. Consequently, a more suitable approach involves taking all of these factors into account to approximate a final concept of happiness at work (Fisher, 2010).

The multidimensional nature of happiness is clear and has been described explicitly in the work of Fisher (2014), Rothmann (2013) and Van Horn et al. (2004), among others. Warr (1994) distinguishes four primary dimensions (affective well-being, aspiration, autonomy, and competence), and a fifth, secondary dimension (integrated functioning) that comprises the four primary ones to reflect the person's overall status. Van Horn et al. (2004) propose five dimensions, three of which are in line with Warr's (affective, social, and professional well-being), while also including two additional measures (cognitive and psychosomatic well-being). Paschoal and Tamayo (2008) suggest a scale of well-being at work with both an affective dimension (emotions and moods at work) and a cognitive dimension (perception of expressiveness and personal fulfillment at work). According to these authors, there is a clear distinction between subjective well-being and psychological well-being: The former adopts a hedonic vision, based on the experience of pleasure in the face of suffering, while the latter adopts a eudaimonic approach to happiness. Singh and Aggarwal (2018) recently proposed four dimensions, two at the organizational level (supportive and unsupportive organizational experiences), and two dimensions of the worker (flow and intrinsic motivation, work repulsive feelings).

In an attempt to unify the different perspectives of happiness, Fisher (2014) proposes a model that focuses on an individual's core well-being at work, mood experience, and pleasant emotions while working. Subsequently, they also include moods and negative emotions at work, satisfaction judgments at work, and similar attitudes. Finally, this model is completed using the conceptions of general well-being at work, the eudaimonic components, and social welfare.

In terms of studies that examine factors giving rise to happiness at work, it can be said that this is explained by a sum of: (1) job characteristics, such as the salary, promotion opportunities, schedule, the level of danger of the job, its monotony, etc.; (2) work environment characteristics, such as the environment of the company, the average salary compared to their own, the size of the company and its potential, etc.; and (3) worker features, such as age, gender, educational level, relationship status, etc. (Linz & Semykina, 2010). Likewise, Parker and Hyett (2011) have identified organizational respect for the employee, employee care, and the intrusion of work into an individual's private life as positive and negative antecedents of well-being (Fisher, 2014).

One variable that has frequently been analyzed as a source of job happiness is wages. While some authors argue that high incomes contribute to an increase in individual happiness (Clark, Kristensen, & Westergård-Nielsen, 2009), others have shown that this relationship depends on the perception of workers regarding

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the fairness of the rewards they receive for their work (Sloan & Williams, 2000). In isolation, Judge, Piccolo, Podsakoff, Shaw, and Rich (2010) did not find that salary effected job satisfaction, but the researchers did observe that employees with higher wages were slightly more satisfied than those who earned less. For Warr (2013), meanwhile, salaries have a positive influence on low-income workers, before then behaving neutrally after reaching a certain level of income. In line with this, we have identified another stream of studies that also consider intrinsic gains, such as the ability to acquire new skills and the positive effect of this in a generating well-being and increasing the level of happiness achieved (Origo & Pagani, 2009).

Professional stability, reflected in the quality of the employment contract, such. As whether an agreement is fixed term or open-ended, has also been frequently analyzed as an antecedent of happiness. Both Sanín, López, and Gómez (2015) and Useche and Parra (2002) have found that job security has a remarkable influence on a worker's happiness, while Hosie and Sevastos (2009) and Sanín and Restrepo (2009) have observed that the lack of guarantee of a permanent job triggers negative feelings that limit the happiness of the worker. Thus, people in an organization will show greater satisfaction to the extent that they feel professionally safe (Wright, Larwood, & Denney, 2002), while employment using the most precarious contracts is negatively related with worker happiness levels (Gamero, 2007). However, it is a professional stability that influences the level of happiness of the worker, since "emotional stability" affects happiness both in the workplace and in other areas of personal life (Judge et al., 2002).

Finally, we have found other studies that seem to place an emphasis on the degree to which an individual has independence and freedom at work that extends beyond earnings or the contractual form. Thus, Benz and Frei (2004) observe a higher degree of happiness in workers who opt for self-employment, because the feeling of freedom they experience – but don't necessarily have - is greater. As was the case regarding the impact of salary levels, Warr (2013) has again found that this autonomy positively affects happiness at lower levels of independence before then achieving neutrally after a certain level. However, if freedom grows excessively, the value of the happiness achieved may decrease.

Regarding the history of antecedents in relation to flourishment, Warr's model (1987) recognizes nine environmental conditions responsible for psychological well-being (opportunity for control, skill use, interpersonal contact, external goal and task demands, variety, environmental clarity, availability of money, physical security, and valued social position). Similarly, the Job Characteristics Model (Hackman & Oldham, 1980) specifies five dimensions of a task (skill variety, task identity, task significance, autonomy, and feedback) that may affect job satisfaction, work commitment, and other aspects of flourishment. Smith, Kendall, and Hulin (1969) have also proposed five facets of job satisfaction: work, supervision, co-workers, wage, and promotion.

Description of the scale and data collection

Del Junco et al. (2013) propose building a scale for measuring happiness using responses to three questions:

- What is your definition of happiness?
- What do you understand by happiness in an organization?
- What is happiness at work? (Del Junco et al., 2013, p. 10).

These questions were asked in open interviews with Portuguese and Spanish workers, whose transcriptions were then analyzed using the ATLAS / TI V6.0 tool to carry out content analysis designed to extract the most relevant factors. These factors gave rise to 15 items, structured into a questionnaire (see Exhibit 1), that were proposed to measure organizational happiness (Del Junco et al., 2013, p. 15). Prior to these questions, two control questions concerning age and gender are also included, which correspond to individual variables that the literature considers may affect an individual's level of happiness.

Exhibit 1. **Questionnaire proposed by Del Junco et al. (2013)**

Rate From 1 to 7 (Strongly agree) the following statements	
1	I enjoy my work
2	The family brings me happiness
3	I have good health
4	In my life, love plays an important role
5	I have internal stability
6	I am feeling objectively well
7	I have professional stability
8	At work, I get fair rewards
9	The company's organizational climate is good
10	Bosses manage well
11	I enjoy doing my job well
12	The organizational climate at my work unit is good
13	The internal motivation for my job is high
14	My tasks at the company are well designed
15	I'm an extrovert

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Representative companies of varying sizes and from different sectors of activity within the province of Seville were chosen, each of which was selected from the list of companies provided by "einforma.com" (See Survey data collection characteristics in Exhibit 2), to validate the scale for this study.

Exhibit 2. **Survey data collection characteristics**

Data Collection Methods	Direct, face-to-face in participating companies
Geographical scope	Seville
Universe	Micro-, small-, medium- and large-sized enterprises
Number of surveys	262

The questionnaires were made by visiting companies to maximize the number of responses. The first contact was made with the head of the company, preferably in the human resources department, highlighting our desire for them to participate in our research. The characteristics of the individuals surveyed are as follows:

Table 1. **Sample composition**

Gender	
Women	39.40%
Men	60.60%
Age	
20-29	12.40%
30-39	35.30%
40-49	24.70%
50-59	22.90%
60-69	4.70%
Older than 70	0%

Analysis of the evidence of the scale validity

The validity of measuring an instrument for a specific use is defined as the degree to which the evidence and theory support the interpretation of the research instrument regarding that particular use (AERA, APA, NCME, 2014). In this sense, validation will consist of obtaining empirical evidence, examining relevant literature, and conducting logical analysis to evaluate each proposition. Unlike the traditional distinction offered by Content, Construct, and Criterion Validity, in the 2014 updated edition of the Standards of the American Education Research Association (AERA), the American Psychological Association (APA), and the National Council on Measurement in Education, the concept of validity is proposed as unique and manifested by examples of validity (AERA, APA, NCME, 2014, pp. 14). These forms of evidence of validity can be specified as follows:

- **Evidence based on test content:** This is evidence obtained from the analysis of the relationship between the content of the questionnaire and the theoretical construct to be measured.
- **Evidence based on the response process:** A theoretical and empirical analysis of the response process that can provide evidence regarding the fit of the construct and the response given to the test.
- **Evidence based on the internal structure:** This shows the degree to which the relationships between the test items and the test components make up the construct to be interpreted.
- **Evidence based on relations to other variables:** The interpretation of a given use of the test implies that the construct must be related to other variables.
- **Convergent and discriminant evidence:** In the first case, we refer to the relationship between test scores and other measures that attempt to evaluate the same construct or similar constructs. The relationship between the test scores and measures with different purposes provides the discriminant evidence.

Next, we analyze these types of evidence regarding the scale proposed by Del Junco et al. (2013).

Evidence based on test content

To obtain these pieces of evidence, it is first necessary to define the theoretical construct that is intended to be measured, and to gain an understanding of the construct in terms of the concept or characteristics that are to be assessed using the designed test (AERA, APA, NCME, 2014). The detailed description of this construct provides a conceptual framework for the measuring instrument. In the case of the scale proposed by Del Junco et al. (2013), the extent to which the items reflect the theoretical aspects of the concept of happiness, as described in the theoretical section of this work, was analyzed first. Towards this purpose, we have

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classified the items in the questionnaire that reflect the hedonic side of happiness as "Hed", while those reflecting the eudaimonic side of happiness are classified as "Eud" (Fisher, 2010). Likewise, given that the factors that influence worker happiness consist of a combination of individual and environmental aspects (Warr, 2013), the second column of Exhibit 3 classifies the statements according to these aspects.

Exhibit 3. **Content validity analysis**

	Rate From 1 to 7 (Strongly agree) the following statements	Hed/Eud[1]	Ind/Ent[2]
1	I enjoy my work	Eud	Ind
2	The family brings me happiness	Hed	Ent
3	I have good health	Hed	Ind
4	In my life, love plays an important role	Hed	Ind
5	I have internal stability	Hed	Ind
6	I am feeling objectively well	Hed	Ind
7	I have professional stability	Hed	Ent
8	At work, I get fair rewards	Eud	Ent
9	The company's organizational climate is good	Eud	Ent
10	Bosses manage well	Eud	Ent
11	I enjoy doing my job well	Eud	Ind
12	The organizational climate at my work unit is good	Eud	Ent
13	The internal motivation for my job is high	Eud	Ind
14	My tasks at the company are well designed	Eud	Ent
15	I'm an extrovert	Hed	Ind

Notes: [1]Item that addresses the Hedonic or Eudemonic component. [2]Item that addresses an Individual or Environmental factor.

The items extracted from the content analysis reflect both factors related to the worker (Groot & Maassen van den Brink, 1999) and the groups in which they carry out their tasks (Baker et al., 2006; Suh & Koo, 2008). As the questionnaire has been extracted from an exploratory study, these items do not strictly reflect variables previously delimited by the researcher, but instead highlight the variables that interviewees perceive as being relevant to the questions regarding the field of happiness at work. By observing these variables, we can then state that the content of these items is framed within the array of works that deal with happiness antecedents, not with direct measures regarding happiness.

Evidence of validity in the response process

The questionnaires have certain limitations. However, the researcher can control for these if the fundamental principles of the design and administration of the surveys (Dillman, 2000) are followed. This category includes the pre-test, the follow-up procedures, and the non-response bias analysis. Regarding the scale proposed by Del Junco et al. (2013), the non-response bias was analyzed in terms of both the sector and size of the company to check if the sample could generate errors when validating the scale. The nonparametric Chi-square test showed that the sample composition reflected the population composition.

Evidence based on the internal structure

To analyze the consistency of the items of the scale regarding one or more of the factors, the normality of the data was assessed and an Exploratory Factor Analysis (EFA) conducted using SPSS 22 statistical package (George & Mallery, 2003). This was done to contrast its multidimensionality and reliability level (Hair, Anderson, Tatham, & Black, 1999). The interquartile range method was used, replacing outliers with means of the values of the variable once the outlier was eliminated, to detect atypical cases or outliers that may affect the validity conclusions. An example of a study variable can be seen in Table 2.

Table 2. **Calculations of the outliers' detection interval**

Variable 1	I enjoy my work
Median (Q2)	0.365
IQ Range	1.349
Q1	-0.309
Q3	1.04
Lower Limit[1]	-4.358
Upper Limit[1]	5.089

Note: [1]Interval limits for not considering data as outliers.

The normality of the data was analyzed using the Kolmogorov-Smirnoff test, which showed that the data did not follow a normal distribution. Using asymptotically robust

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statistics, however, meant that the study was unaffected by the non-normality of the data. In the EFA, a Cronbach's Alpha that exceeds 0.7 is required as a criterion of reliability for the different dimensions (Hair et al., 1999). Regarding the measures of both Extracted Variance (variance that is able to explain the latent factor or variable) and Composite Reliability (internal consistency of the indicators), 0.5 and 0.7 have traditionally been established as the respective cut-off points (Hair et al., 1999). However, Valentini and Damásio (2017) state that a strict threshold cannot be set for these measures because they can suffer alterations depending on the number of items and the homogeneity of the factor loads. These could then limit the interpretation of the results (Valentini & Damásio, 2017), meaning these values are analyzed with caution. The EFA was performed using the maximum likelihood extraction method. This approach offers results close to those generated by Confirmatory Factor Analysis (AFC) and varimax rotation, due to the ease they offer when interpreting factor loads (Hair et al., 1999). The significance of the model is analyzed with the KMO coefficient (Kaiser-Meyer-Olkin), whose values have to be close to 1, and the Barlett sphericity test, the results of which must be significant (Hair et al., 1999).

The first EFA results are shown in Table 3, where the value of the KMO measure, 0.876, indicates a high correlation regarding the variables. This means the test can be considered good (it is considered to be excellent when KMO›0.9), with the results also deemed significant using the Barlett sphericity test, thus justifying the factor analysis. The results also show that two factors on the scale can be distinguished, which jointly explain 45.53% of the variance. In this context, the initial factor loadings are as follows:

Table 3. **Results of the initial model factor analysis (15 items)**

	Item	Factor 1	Factor 2
1	I enjoy my work	0.616	0.288
2	The family brings me happiness	0.09	0.508
3	I have good health	0.03	0.504
4	In my life, love plays an important role	0.06	0.398
5	I have internal stability	0.19	0.756
6	I am feeling objectively well	0.397	0.58
7	I have professional stability	0.459	0.322
8	At work, I get fair rewards	0.748	0.085
9	The company's organizational climate is good	0.834	-0.018
10	Bosses manage well	0.892	0.091
11	I enjoy doing my job well	0.292	0.58
12	The organizational climate at my work unit is good	0.668	0.229
13	The internal motivation for my job is high	0.664	0.35
14	My tasks at the company are well designed	0.708	0.214
15	I'm an extrovert	0.327	0.257

(continue)

(continuation)

Table 3. **Results of the initial model factor analysis (15 items)**

In Table 3, we can also see that variable number 4 ("In my life love plays an important role") has factor loadings that are significantly less than 0.5, indicating reliability problems. Likewise, if this variable is eliminated, Cronbach's Alpha of the scale changes from 0.884 to 0.888. We therefore consider it relevant to remove the variable from the final scale. This process also applies regarding the variables "I have good health," "The family brings me happiness," and "I am an extrovert." Table 4 shows the results of the final model after these four factors have been eliminated:

Table 4. **Results of the final model factor analysis (11 items)**

Item	Factor 1	Factor 2
At work, I get fair rewards	**0.699**	0.262
The company's organizational climate is good	**0.856**	0.085
Bosses manage well	**0.871**	0.24
The organizational climate at my work unit is good	**0.613**	0.349
The internal motivation for my job is high	**0.555**	0.539
My tasks at the company are well designed	**0.649**	0.35
I enjoy my work	**0.504**	0.502
I have internal stability	0.106	**0.627**
I am feeling objectively well	0.308	**0.574**
I have professional stability	0.353	**0.476**
I enjoy doing my job well	0.138	**0.716**

From the perspective of construct analysis, eliminating these items offers a response to the fact that they deal with factors theoretically related to happiness (love, health, family, extroverted character), yet lack a clear relationship with the concept of happiness as defined by this study. Given the results, and when analyzing the content of the items of each dimension, we can distinguish two dimensions: the first concerns factors related to the job environment (Cronbach's Alpha = 0.91) and the second includes worker factors (Cronbach's Alpha = 0.72).

These scales are useful for managerial practice, where the score is used to provide an idea of the happiness of employees in their working environments. However, using a more academic approach to deploy the scale in more complex study models, Confirmatory Factor Analysis (CFA) is carried out using Structural Equation Models (Bagozzi, Yi, & Phillips, 1991). These are used to determine which variables should form the definitive measurement scale.

Using a structural equations approach introduces an estimation regarding the measurement error of the factors. It also introduces measures regarding the goodness of fit by examining the validity of the regression equations and the proximity of the theoretical model to reality (Byrne, 2006). These latter measures are based on a comparison of the covariance matrix of the sample with that of the population, using the Chi-Square statistic and its associated p-value. As this statistic is sensitive to sample size, while also being based on the distribution centrality, numerous alternative adjustment indexes have emerged in recent decades offering a more pragmatic view (Byrne, 2006). Regarding the non-normality of the data, asymptotically robust indicators are used, from which the Satorra-Bentler Chi-Square (Satorra, 1993) emerges as the most reliable statistic through which to evaluate the structure of means and covariances under various sample distributions and sizes (Hu, Bentler, & Kano, 1992; Curran, West, & Finch, 1996). Table 5 summarizes the most frequent Fit indexes to be analyzed, along with the Chi-Square SB and its p-value.

Table 5. **Goodness of fit indexes**

Fit Index		Cut-off point	Comments
Most widely accepted Index	Comparative Fit Index (CFI)	›0.95	Created by Bentler (1990). It avoids problems regarding small samples and, although a CFI value greater than 0.9 has formerly been considered acceptable (Bentler, 1992), a cut-off value has been established of around 0.95 (Hu and Bentler, 1999). The CFI is regarded as the most widely accepted goodness of fit index (Byrne, 2006).
Absolute Fit Indexes	Goodness of Fit Index (GFI)	›0.9	Considered analogous to the value of the R square of the multiple regression models (Tanaka, 1993).
	Adjusted Goodness of fit Index (AGFI)	›0.9	Adjusted for the degrees of freedom of the model, penalizing the incorporation of additional parameters.
	McDonald Fit Index (MFI)	›0.89	Hu and Bentler (1999) specified the cut-off value for MFI other than that of GFI and AGFI
Absolute Misfit Index	Root Mean Square Error of Approximation (RMSEA)	‹0.6	One of the best information-provider indexes in the covariance structure model (Byrne, 2006). It is sensitive to model specification errors, as it can be used as an interpretive guide regarding the quality of the model and for allowing confidence intervals to be built around the RMSEA values

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In terms of the dimension referring to the characteristics of the job environment, the first analysis, as shown by the results in Table 6, suggests acceptable measures regarding the goodness of fit for some indicators do not meet the required limits:

Table 6. **Goodness of fit indexes of the initial model of Factor 1**

	Cut-off point	Characteristics of the job environment
X^2_{SB} (g.l.)		39.67 (9)
P-Value	›0.05	0
GFI	›0.9	0.932
AGFI	›0.9	0.841
$RMSEA_{robust}$	‹0.6	0.114
CFI_{robust}	›0.95	0.941
MFI	›0.89	0.943
Cronbach's Alpha	›0.7	0.893
Composite Reliability	›0.7	0.894
Extracted Variance	›0.5	0.588

Starting from the fact that both the Chi-Square BS and its p-value are not significant, we must identify the variable(s) motivating this lack of adjustment of the model. This is based on the Lagrange Multiplier Test (LM Test), which indicates which relationships can be included to improve the fit of the model. According to the test, when correlating the variable "My tasks in the company are well designed" with "At work I get fair rewards", and "The internal motivation for my job is high ", a better fit is achieved, as shown in Table 7:

Table 7. **Goodness of fit indexes of the model of Factor 1 with correlated factors**

	Cut-off point	Characteristics of the job environment
X^2_{SB} (g.l.)		6.95 (6)
P-Value	›0.05	0.325
GFI	›0.9	0.987
AGFI	›0.9	0.956
$RMSEA_{robust}$	‹0.6	0.025
CFI_{robust}	›0.95	0.998
MFI	›0.89	0.998
Cronbach's Alpha	›0.7	0.893
Composite Reliability	›0.7	0.901
Extracted Variance	›0.5	0.606

This correlation between items can give rise to multicollinearity problems in complex models. This means it may be advisable to eliminate the item that is the source of this problem (in this case, variable 14), thus achieving a better fit of the model. This is shown in Table 8:

Table 8. **Goodness of fit indexes of Factor 1 after variable 14's elimination**

	Cut-off point	Characteristics of the job environment
X^2_{SB} (g.l.)		6.84 (5)
P-Value	›0.05	0.23
GFI	›0.9	0.986
AGFI	›0.9	0.959
$RMSEA_{robust}$	‹0.6	0.038
CFI_{robust}	›0.95	0.995
MFI	›0.89	0.996
Cronbach's Alpha	›0.7	0.876
Composite Reliability	›0.7	0.879
Extracted Variance	›0.5	0.597

The model's initial goodness of fit results for the scale, concerning the worker-related factors, are presented in Table 9:

Table 9. **Goodness of fit indexes of the initial model of Factor 2**

	Cut-off point	Characteristics of the job environment
X^2_{SB} (g.l.)		30.65 (5)
P-Value	›0.05	0
GFI	›0.9	0.933
AGFI	›0.9	0.799
$RMSEA_{robust}$	‹0.6	0.14
CFI_{robust}	›0.95	0.869
MFI	›0.89	0.952
Cronbach's Alpha	›0.7	0.761
Composite Reliability	›0.7	0.749
Extracted Variance	›0.5	0.429

In this case, while the goodness-of-fit measures do not fall within the ideal intervals, the decision was taken not to continue adjusting this dimension. This was because the four starting items available make it very likely to encounter model specification problems if these variables are discarded.

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Convergent and discriminant evidence

Here, we attempt to confirm that each factor extracted from the CFA measures a single construct while also confirming that the construct referred to is significantly different from the rest of the factors included in the questionnaire. We attempt to identify whether the scales measure only their objective construct or, on the contrary, if they get mixed up with other factors contained in the study. To provide evidence of this type, we follow the procedure proposed by Fornell and Larcket (1981), who argue that there is discriminant validity evidence so long as the variance extracted is higher than the squared correlation between the two constructs. This assessment is usually developed using a matrix in which the correlation between factors for each pairwise are compared with the variance extracted from each factor. In our case, the matrix is extremely simple, but it can still be used to show the procedure for illustrative purposes. In Table 10, the squared correlation of the two factors (0.644^2) is lower than the variance extracted from both factors, meaning that factors 1 and 2 are measuring different constructs.

Table 10. **Discriminant evidence**

	Factor 1	Factor 2
Factor 1	0.597	
Factor 2	0.414	0.409

The second piece of evidence argues that the value of the correlation, plus and minus 1.96 times the standard deviation of the covariance of the indicator, should form an interval in which 1 is not included between the extremes (Hair et al., 1999). In our case, if we add and subtract the product of 1.96 by 0.08 from the correlation score of 0.644, we obtain the interval [0.47-0.81], where 1 is not between the extremes. This means that the second criterion is also met in the case of both dimensions.

DISCUSSION

Based on exploratory content analysis, Del Junco et al. (2013) propose a scale that is initially considered by the authors as an instrument of organizational happiness. By carefully analyzing the content of the scale, it is observed that it represents antecedents of happiness at work, rather than measuring happiness itself. Validity analysis of the proposed items reflects the fact that two dimensions underlie the scale-job environment and worker-related factors, both of which are added to the hedonic balance between accumulated positive and negative life experiences and the achievement of personal goals reached at work (Origo & Pagani, 2009). At the same time, the items of this instrument also consider both the individual characteristics and the effect of the organizational factors, following a number of studies concerning how to manage the whole worker-environment relationship (Fisher, 2010; Warr, 2013). This combination of internal and external factors has enriched studies analyzing the sources of happiness. This is because, as Pan and Zhou (2013) have described, most studies on happiness have focused primarily on the income-happiness relationship, neglecting other variables. Likewise, Seibert, Crant, and Kraimer (1999) have highlighted the interest in studying the relationship between the internal and external environments of the individual to gauge their impact on the happiness of the organization; this refers to those areas collected in the scale that have been revealed to comprise two different dimensions. These dimensions are consistent with Singh and Aggarwal's (2018) approach, in which happiness at work implies an interaction between the experiences of an individual employee and organizational experiences.

The items in the questionnaire include several relevant aspects considered in the existing literature on happiness at work. In this sense, job satisfaction (Fisher, 2003) constitutes a relevant factor in terms of its impact on positive psychology (Proudfoot, Corr, Guest, & Dunn, 2009; Bakker & Oerlemans, 2011). Additionally, job motivation also has a positive influence on individual well-being within a company (López & Fierro, 2015). Furthermore, the organizational climate within both the work unit and the organization has been confirmed in the literature as a relevant factor regarding happiness (Chiumento, 2007; Gutierrez, 1988; López, Chambel, Muñoz, & Silva da Cunha, 2018). Similarly, salary also emerges as a relevant item among the sources of happiness in the questionnaire (Diener & Biswas-Diener, 2002; Frey & Stutzer, 2000; Fuentes & Rojas, 2001; Hagerty & Veenhoven, 2003; Schyns, 2002; Kenny, 2005; Zuzanek, 2013). The ways tasks are designed is also considered by Fisher (2010) as a characteristic that contributes toward improving happiness at work, while Likert (1979; 1986) has shown the influence of sound management on the happiness of people within an organization.

CONCLUSIONS

If only individual factors were weighed to gauge worker happiness, such as genetics or hereditary factors, little could be done to increase and manage the level of happiness (Arvey, Boucharda, Segal, & Abraham, 1989; Haybron, 2000). This work has developed the validity analysis of the scale previously proposed by Del Junco et al. (2013) to measure factors of happiness at work. Based on the

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results obtained, conclusions can be drawn at both the theoretical and methodological levels, and for professional practice.

On a theoretical level, and in line with Linz and Semykina (2012), the validity analysis of the scale has revealed two dimensions. The first is related to the job environment, which, judging by their validity and reliability values, are highly relevant. The second concerns intrinsic worker factors. Much like Fisher (2010), who specifies the measurement of happiness at work using three levels (the work itself, the contextual characteristics of the job, and the organization as a whole), the scale presented here differentiates between aspects involving the job environment (which includes both work, context, and organization), and those involving the worker as an individual.

From a methodological standpoint, this work provides a possible guide through which it is possible to validate scales following a confirmatory approach. This study therefore aims to offer a tool for researchers who validate scales both designed by themselves and those which are the results of the application of scales based on existing studies. Additionally, Fisher (2010) has called for the need to improve the measurement of happiness at work, since existing measures have only collected variables related to it in general terms. This paper attempts to contribute to overcoming this limitation by employing a more concrete scale that has been shown to meet the requirements of reliability and validity. Interestingly, while Ones and Viswesvaran (1996) have suggested that the higher the number of variables, the better predictions are achieved, in our case, the statistical analysis shows that a large number of items is not necessary.

Finally, from a managerial perspective, of the 15 items proposed by Del Junco et al. (2013), this work presents 11 questions that are deemed as reliable and valid in obtaining a practical approximation of the sources of employee's happiness at work. The 11 questions are shown in Exhibit 4.

Exhibit 4. **Questionnaire to be used in a managerial environment to measure happiness at work**

Rate From 1 to 7 (Strongly agree) the following statements
At work, I get fair rewards
The company's organizational climate is good
Bosses manage well
The organizational climate at my work unit is good
The internal motivation for my job is high
My tasks at the company are well designed
I enjoy my work
I have internal stability
I am feeling objectively well
I have professional stability
I enjoy doing my job well

This simple scale is useful in that it enables managers to obtain an approximation of the level of happiness of their workers and take action according to the results of the survey without having to invest in consultants or specialized companies. The measures proposed here are considered active and direct measures as they require a source of information external to the company. In addition, passive or indirect measures, such as staff retention, turnover, and absenteeism, may also be attractive to companies. This is because they use easily accessible internal sources of information, resulting in both immediacy and low cost.

In Spain, most companies that form part of the country's industrial and commercial networks cannot carry out in-depth research to determine the happiness levels of their employees. In this regard, it is useful for managers to use questionnaires, such as the one proposed by Del Junco et al. (2013), which can combine both some of the constructs cited and offer insights into the happiness levels of the workers within their organizations.

Limitations and recommendations for future research

The term "happiness at work" can itself be considered as the source of some study limitations. This is due to the absence of a unique definition and its differentiation concerning other similar terms. While we have attempted to show the fundamental problems that arise due to the study being based on previous contributions from a diverse range of authors, to provide a fuller understanding it would be necessary to extract new factors from both the environment and the workers themselves across various disciplines to enrich and complete the scale presented here. Regarding the validation of the scale, this work does not offer evidence based on the relationship with other variables. Consequently, it would be convenient for this scale to be used in conjunction with measures of happiness at work that act as a criterion variable for validating the use of this scale.

Regarding the elimination of items from the questionnaire, this process does not imply that the items in question fail to reflect relevant factors for happiness at work. On the contrary, their elimination may be due to the omission of items that form a new dimension related to the content of the items removed. That it is what has happened regarding issues related to health, love, or family, which, according to the literature, are relevant, highly complex constructs. Instead, these have been collected in a single item, while it has been statistically necessary to omit them from the final scale as they do not have any correlation with others. Therefore, a future line of work would consist of enlarging

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the number of issues related to these factors to reflect more dimensions of a concept as complex as happiness at work. This would include factors that positively and negatively determine the level of happiness of the worker (Ferreira et al., 2008).

Finally, it is worth noting that the geographical location of the sample (limited to the province of Seville) may represent another limitation regarding this study's conclusions. Although geographical and cultural factors are not likely to invalidate the objective of the study, future research conducted in a wider geographical environment may yield more data regarding the reliability and validity of the scale.

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MULTILEVEL ACADEMIC PRODUCTIVISM: PERFORMATIVE MERCHANDISE IN BRAZIL'S GRADUATE SCHOOLS OF MANAGEMENT

Produtivismo acadêmico multinível: Mercadoria performativa na pós-graduação em Administração no Brasil

Productivismo académico multinivel: Mercancía performativa en programas de posgrado en Administración en Brasil

ABSTRACT

The objective of this article is to analyze academic productivism in graduate schools of management in Brazil from a multilevel perspective. First, we discuss the emergence of productivism, in addition to reflecting on the conflict between teaching and research as a manifestation of productivism. Next, we analyze this phenomenon at three levels—governmental, institutional, and individual—which may help management researchers examine its impact on productivity, working conditions, and professor well-being. Based on the reflections presented here, we recommend defining academic productivism as a performative act that institutionalizes a set of actions and behaviors, characterizes a social representation as a field of knowledge, delimits a system of beliefs and values oriented to a performative culture incorporated socially into action, and affects the working conditions, health, well-being, and careers of the professors who are part of the community.

KEYWORDS | Academic productivism, graduate studies in management, multilevel perspective, professor, performative act.

RESUMO

O objetivo deste artigo é analisar o produtivismo acadêmico na pós-graduação em Administração no Brasil a partir de uma perspectiva multinível. Inicialmente, aborda-se o surgimento do produtivismo, além de refletir-se sobre o conflito entre o ensino e a pesquisa como uma manifestação do produtivismo. Em seguida, discute-se o fenômeno em três níveis: governamental, institucional e individual, o que pode auxiliar os pesquisadores da área a refletirem sobre o seu impacto na produtividade, nas condições de trabalho e no bem-estar do docente. A partir das reflexões apresentadas no artigo, propõe-se uma definição de produtivismo acadêmico como um ato performativo que institucionaliza um conjunto de ações e comportamentos, caracteriza uma forma de representação social de uma área do conhecimento, delimita um sistema de crenças e valores orientados para uma cultura performativa incorporada socialmente na ação e afeta as condições de trabalho, a saúde, o bem-estar e a carreira de professores que integram a comunidade da área.

PALAVRAS-CHAVE | *Produtivismo acadêmico, pós-graduação em Administração, perspectiva multinível, docente, ato performativo.*

RESUMEN

El objetivo de este artículo es analizar el productivismo académico en el posgrado en Administración en Brasil desde una perspectiva multinivel. Inicialmente, se aborda el surgimiento del productivismo, además de reflexionar sobre el conflicto entre la enseñanza y la investigación como una manifestación del productivismo. A continuación, se discute el fenómeno en tres niveles: gubernamental, institucional e individual, lo que puede ayudar a los investigadores del área de administración a reflexionar sobre su impacto en la productividad, las condiciones de trabajo y el bienestar del docente. A partir de las reflexiones presentadas en el artículo, se propone una definición de productivismo académico como un acto performativo que institucionaliza un conjunto de acciones y comportamientos, caracteriza una forma de representación social de un área del conocimiento, delimita un sistema de creencias y valores orientados hacia una cultura performativa incorporada socialmente a la acción y afecta las condiciones de trabajo, la salud, el bienestar y la carrera de profesores que integran la comunidad del área.

PALABRAS CLAVE | *Productivismo académico, posgrado en administración, perspectiva multinivel, profesor, acto performativo.*

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ACADEMIC PRODUCTIVISM IN GRADUATE SCHOOLS: WHERE ARE WE?

Academic productivism has been a subject of discussion for several decades. According to De Paula and Boas (2017), the phenomenon arose in the last century in the United States and became known by the expression "publish or perish," since universities used the number of publications as a determining factor in the progression of an instructor's career, based on indicators established by institutional agencies.

In Brazil, the phenomenon has been approached by several researchers who emphasize certain aspects involving academic publication (Alcadipani, 2011; Rossoni, 2018; Sguissardi & Silva, 2009), including the precariousness of the work (De Paula & Boas, 2017) and the health of the professors (Godoi & Xavier, 2012; Leite, 2017), among others.

Academic productivism is also influenced by public policies aimed at stimulating the internationalization of academic publications as well as the need to improve a country's position in international rankings (Adler & Harzing, 2009). In a more critical light, Machado and Bianchetti (2011) point out that academic productivism "provides the key that translates market mechanisms to the academic intellectual world" (p. 251) and can be considered a form of "academic capitalism."

The Higher Education Personnel Improvement Coordination (Coordenação de Aperfeiçoamento de Pessoal de Nível Superior [CAPES]) has a consolidated postgraduate assessment system based on academic productivity indicators centered on the dimensions of Graduate Programs (GPs) in the context of the process of student development, academic publication by professors, and the social position of the program.

In 2018, CAPES approved changes to the assessment instrument, which now has three requirements or dimensions (program, development of scholars, and impact on society) and 12 items (indicators) with minimum weights. The definitions of, and comments on, the dimensions and indicators, as well as the assessment metrics, are defined by a committee with specific knowledge of a field. The changes indicate the need for GPs to adopt a strategic orientation and self-assessment system, place greater emphasis on training processes, and focus on outcomes from GPs that impact assessment, innovation, and internationalization.

Even with the proposed changes, it is believed that academic productivism, from the perspective proposed in this article, will continue to be widespread in graduate schools because institutional relations will continue to be permeated by pressure to produce results, with repercussions on the working conditions and the lives of those involved.

It is assumed that the graduate assessment system in Brazil has made academic productivism a complex phenomenon with some anomalies because the amount of time devoted to various activities, whether in one or more graduate programs, influences the potential impact of the publication of professors' work, causing unintended consequences like the "serial production" of papers (Rigo, 2017), ceremonial co-authoring (Rossoni, 2018), and the "global" proliferation of the "publish or perish" mentality (Alcadipani, 2017), with articles in English appearing in national journals that should resist this "global" logic and instead promote publication in Portuguese.

Another relevant discussion involves the careers of professors at Brazilian universities, especially public ones, that has to do with the value placed on teaching. At many institutions, there are departmental conflicts between professors who develop the activities of graduate programs and others who do not, because sometimes the latter state that those who work in graduate research have a lighter teaching load and that, by prioritizing research, they are relegating teaching to the background.

The discussion involves the paradox of teaching and research in professors' performance in the university context (Alcadipani, 2017; Balkin & Mello, 2012; Braxton, 1996; Santos, 2017; Smeby, 1996; Vroom, 2007), which is also a consequence of academic productivism, as many universities at the international level do not assign teaching hours to a professor who prioritizes research activities and publication, thus ensuring that a university occupies a good position in international rankings, attracting students and financial support for research and innovation from institutions, and guaranteeing the stability of the professor's career.

This is not the logic of the reality of management professors in Brazil who perform activities in GPs and engage in teaching, research, and management activities (Silva & Costa, 2014) and who, to comply with CAPES indicators, feel pressured by institutional assessments. In addition, they perform several activities that demand a lot of time, such as attending meetings and commissions, evaluating papers, and participating in thesis and dissertation assessment committees, among others (Santos, 2017), which impacts their quality of life and well-being (De Paula & Boas, 2017).

Some professors at Brazilian universities say that working in graduate programs is a choice, especially at a public university, but up to what point? What motivates a professor to work in a graduate program? Could it be the social status associated with it or the desire to contribute to the training of new researchers? Could it be to raise funds and scholarships to conduct research or seek

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recognition from the academic community for their contribution to the development of an area of knowledge? Could it be the financial reward offered by the institution for publishing papers in high-impact journals? In this case, such financial rewards can only be obtained in the graduate programs of private institutions, since, at public institutions, there are no differences in salary between those who work with only undergraduates and those who concurrently work with both undergraduate and graduate students.

This set of factors also depends on the strategies of the individual GPs, their ranking on the CAPES assessment, and the individual strategies of each researcher. Most likely, several factors work together to illustrate that a career is indeed a process of choice, but the motivational factors that lead professors to work in GPs are also influenced by institutional pressures and a system that creates an environment of competition, individualism, and psychological pressure to maintain a high level of time commitment to productivity and the power play of interests that exists in a field.

At most Brazilian higher education institutions (HEIs), the career of a researcher is not regulated. Thus, all are professors of higher education, without, in fact, a definite idea of what it is to be a professor at a university. There are companies, for example, at which a manager enters the base level of the career structure of Y, and, over time, he or she can choose between two paths: one that is more technical, and one that is managerial. Knowing this, the question follows: Why doesn't the career of a professor, especially at a Brazilian public university, follow a similar path, since some professors focus their careers on teaching and others on management, with those who teach at graduate schools often engaging in activities related to teaching, research, and, at some point, management? For the latter group, academic productivism is much more detrimental, as it affects the amount of time devoted not only to professional life, but also to personal endeavors, with an impact on the health and well-being of such professors, leading to anxiety disorders, burnout syndrome, and depression, among other issues.

The title of this paper uses the term performative merchandise because productivism, as a performative act in a pragmatic sense, can be associated with merchandise with a measurable, tangible value and financial rewards for good performance, that is, assigning quantitative value through indicators and metrics that generate a ranking, as well as intangible value, which is associated with cultural and symbolic representations that influence the behaviors and actions of the actors involved in the postgraduate context.

The notion of performativity adopted in this paper is associated with both action and performance (Bispo, 2016). As an action, the performativity of productivism arises from a symbolic discourse about what a productive professor is: that is, one who teaches, researches, produces, manages various administrative activities, and actively participates in the academic community. Regarding performance, performativity is a consequence of a system of social interaction in the graduate context that rewards those who raise funds through research projects, publish their work in high-impact journals, and even receive financial rewards as a result. Performativity is comprised of the relationship between activities, materiality, and temporality (Gond & Cabantous, 2015) that exists in the context of graduate schools.

The paper aims to analyze academic productivism in graduate schools of management in Brazil from a multilevel perspective. The analysis considers the various dimensions that impact teaching performance in the institutional context of graduate programs and aims to reveal that the phenomenon goes beyond concern for the frequency of publication: it is complex because it must be analyzed from multiple integrated dimensions.

Regarding the fact that teaching identity in the field of management is not yet well-defined and that the environment of graduate-level teaching is marked by an array of activities that generate various questions about the meaning of being a professor, this article presents the following contributions: (a) it proposes a new perspective on analysis of academic productivism to help researchers in the field reflect on the impact of the phenomenon on productivity and working conditions, as well as on the health and well-being of professors; (b) it stimulates a critical reflection on the postgraduate assessment process under discussion at CAPES; and (c) it reveals the practical importance of discussion of institutional policies and management actions at universities and GPs in management.

THE CONFLICT BETWEEN TEACHING AND RESEARCH AND ITS RELATION TO ACADEMIC PRODUCTIVISM

The active professor's environment in the context of the Brazilian university is changing due to a set of factors, especially those related to academic performance and competitiveness at the institutional level. Some of these factors involve a drive for greater efficiency, productivity, and institutional reputation, which impacts practices in the areas of both teaching and research (Balkin & Mello, 2012) in the context of competition among researchers, universities, and journals for better positions in international academic rankings (Adler & Harzing, 2009).

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The institutional environment of Brazilian universities is marked by the search for greater scientific productivity by way of pressure from government agencies, such as the Anísio Teixeira National Institute for Educational Studies and Research (Instituto Nacional de Estudos e Pesquisas Educacionais Anísio Teixeira [INEP]) and CAPES, which impact the internal policies of universities, either at the undergraduate or graduate level, and affect the work of professors, who are subjected to individual performance metrics in relation to teaching and research, as well as their contributions to society. According to Leite (2017), political reforms in the education system have caused physical and emotional problems among professors, which have still received little attention in the context of higher education.

Authors such as Boas and Morin (2013) and De Paula and Boas (2017) point out that the workload of professors, in general, presents a psychological risk factor, which manifests itself in universities due to the demands of teaching, research, and publication, as well as the uniqueness of the professional duties of university professors' career, which are marked by the complexity and physical and emotional exhaustion of their workday and have an impact on health (Godoi & Xavier, 2012; Leite, 2017; Santana, 2011), well-being (Frenzel et al., 2016), and susceptibility to stress and burnout (Pignata, Winefield, Boyd & Provis, 2018).

One of the paradoxes of university teaching, especially among graduate professors, is the conflict between teaching and research, essential dimensions of academic work at a university (Light & Calkins, 2015). This dichotomy has been approached for several decades because of the fragmentation and specialization of knowledge that occurred mainly after World War II (Neumann, 1992). This relationship between these activities is complex (Smeby, 1998) because there is competition or "rivalry" between research and teaching (Light, Cox & Kalkins, 2009) involving time, focus, attention, and energy (Balkin & Mello, 2012), which generates conflict (Vroom, 2007) between the two.

Braxton (1996) establishes three perspectives from which to discuss the conflict between teaching and research. The first reinforces that the teaching and research dimensions are independent and that there is no relationship between them. The second perspective is one of conflict, as both involve different expectations and obligations, and thus more time devoted to one dimension causes less time to be devoted to the other. The third perspective is one of complementarity, since teaching and research roles are complementary and mutually reinforcing. Light and Calkins (2015) use a rope metaphor to explain that there is a tenuous relationship between research excellence and teaching quality.

In the context of Brazilian higher education, this paradox takes on an even more complex configuration, since it is influenced by public education policies, a university's internal policies, specific resolutions of academic departments, and conflicts of interest between professors. CAPES's public and business administration, accounting, and tourism fields, for example, will establish specific descriptors and metrics for the assessment of the quadrennium (2017-2020) that will take place in 2021, which is related to three dimensions: program, development of scholars, and impact on society.

In the "development of scholars" dimension, for example, each GP will be evaluated according to five items. However, the relationship between teaching and research in each GP is already institutionalized and may be one of independence, conflict, or complementarity, that is, it is a consequence of the strategy adopted to address the development of scholars, the professor's profile, the program's objectives, and the university's institutional policies. This reflection on education is pertinent because, according to Balkin and Mello (2012), there are determining factors that reinforce the distinction between teaching and research, with a greater challenge for the first. The authors further point out that research is rewarded globally, while teaching is less externally visible.

In the context of graduate programs in general, and in graduate courses in management in particular, this relationship also assumes a more contentious quality because there is a traditional understanding that the goal of graduate school is to train future researchers and, therefore, the teaching dimension ends up taking a secondary position. However, training good researchers requires the establishment of a development process for students and a concept of the professor's role that involves mastery and mobilization of theoretical, epistemological, and methodological competences for the practice of teaching, conducting research, and producing academic writing (Silva & Costa, 2014), as well as academic supervision, while still involving the intellectual, contextual, social, emotional, political, and moral dimensions of education (Costa, Sousa & Silva, 2014).

In a research conducted with professors involved with GPs in management in Brazil, Santos (2017) identified that teaching practices in this context are complex and involve both a set of knowledge (professional, curricular, experiential, and disciplinary) and various roles (teacher, advisor, manager, reviewer, and researcher). Thus, teaching practices are multidimensional, and they encompass institutional, socio-emotional, and professional dimensions. The performance of professors in the context of their graduate work involves the development of the professors' career, which is linked to

research practices and peer relations, academic supervision, student learning, and teaching vocational practice, as well as a set of academic activities related to their professional actions.

The characterization of teaching practices in the graduate management field in Brazil indicates the existence of a multiplicity of types of teacher knowledge and roles that, while helping to construct a teaching identity, also involve the generation of conflicts because of the amount of time that must be dedicated to each of the roles. This conflict was pointed out by Hattie and Marsh (1996) as a negative factor in the relationship between teacher knowledge and roles. Another factor mentioned by the authors involves personality, since the personal characteristics of researchers also impact their way of acting and tendency to value one dimension more than another.

The fragmentation of teaching, research, and learning is the result of the dominant discourse, which emphasizes accountability and performativity and states that academics must be engaged through critical reflection and action. Leathwood and Read (2014) indicate that demands for accountability and auditing of professors are evident in several countries where performativity is a process of measuring and evaluating the quality of teaching and research. It is a vision centered on a "new" managerialism or, as Kalfa, Wilkinson, and Gollan (2018) argue, it is an academic game that defines the work of teaching from the perspective of a pressure-filled environment to increase the amount of research and the quality of the results (Leathwood & Read, 2014).

Performativity in the postgraduate context is associated with a culture of obtaining results through metrics that make academic work a product that can be measured by productivity indicators. In this game, research turns out to be a metric of success because its products are more tangible and easier to measure than those of teaching. Teaching has more qualitative and subjective indicators. In the United Kingdom, for example, starting in 2016, an indicator called the Teaching Excellence Framework (TEF) was instituted by the government, with the aim of rewarding learning and teaching excellence according to a set of metrics (Canning, 2017; Rudd, 2017). However, the TEF has received some criticism regarding its effectiveness (Canning, 2017), since such indicators tend to standardize curricula, establish objective and standardized performance metrics, restrict teaching practices, and dehumanize students.

In the context of undergraduate and graduate studies in management, one of the phenomena that have attracted the attention of researchers and that have most contributed to the generation of conflicts between teaching roles in the context of universities is academic productivism. In the next section, this phenomenon is analyzed from a systemic and multilevel perspective.

ACADEMIC PRODUCTIVISM IN GRADUATE SCHOOLS OF MANAGEMENT: BEYOND "PUBLISH OR PERISH"

Academic productivism is not a recent phenomenon in the institutional context of universities and countries, especially because it involves a "game" in which governments, universities, and researchers seek to position themselves favorably in search of legitimation, recognition, and rewards. In this paper, the discussion of academic productivism in graduate schools of management goes beyond "publish or perish."

The term "academic productivism" is best-known in Brazil, although its origin is in the United States, being associated with the "publish or perish" phenomenon. This is because the governments of these countries have institutionalized public policies for graduate-level assessment and have linked professors' publication frequency to the quantitative productivity indicators used by universities for performance assessment and career growth, as well as for fundraising provided by public or private agencies. Those who do not achieve high productivity rates end up perishing in their careers, hence the origin of the expression "publish or perish" (Paula & Boas, 2017).

In recent years, many researchers have discussed the academic productivism associated with the quantitative dimension of academic publications, and much criticism has arisen around strategies such as ceremonial co-authoring (Rossoni, 2018) and paper production as student assessment (Bispo & Costa, 2016), and there have also been increased discussions about the quantity and quality of scientific publications (Bertero, Caldas & Wood, 1999; Wood & Costa, 2015).

This article seeks to broaden the scope of the definition of academic productivism, which should be analyzed from a multilevel perspective. It is assumed that the analysis of academic productivism must be multilevel because (a) to think about the phenomenon only from the perspective of publication is to disregard the fact that publication is a process that involves dedication and time devoted to research, processes of theoretical construction, and methodological definitions and analyses of applied social phenomena, as is the case in management; (b) it cannot be considered dissociated from other dimensions of teaching practice, such as teaching and management of academic and administrative activities; (c) its manifestations depend on working conditions, institutional pressures, and the professors' working environment; and (d) it also involves human nature, as researchers' productivity also impacts their job satisfaction, subjective well-being, and engagement with their work.

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Thus, academic productivism cannot be treated solely from the critical perspective of publication or its absence as an exclusive criterion, but it can be analyzed from a multilevel perspective: governmental, institutional, and individual.

Academic Productivism as consequence of performative governmental public policies

At this level of analysis, academic productivism is encouraged by the existence of ranking systems (Adler & Harzing, 2009) created by associations or governments with policies that encourage publication (Frazoni et al., 2011) and that use journal classification indicators to assess the impact of research (Nkomo, 2009) on project appraisal, researcher performance appraisal, and funding grants by research agencies. This perspective is related to a culture of performativity (Moreira, 2009), of regulation as a means of control, and of pressure and change, whose main measure of success is academic performance based on results indicators, which allow the government, in several countries, to assume both the roles of regulator and performance auditor.

In some cases, the process is based on the assessment of research group performance, and, in others, financial reward systems for the best publications are institutionalized. Thus, if the system rewards articles in high-impact publications and institutionalizes a mercantilist view of the graduate school system, its mission to develop researchers ultimately becomes compromised. In addition, institutions use their positioning in international rankings as a strategy to attract students, highly productive researchers, and investments.

In the Brazilian case, public policies linked to academic productivism are institutionalized by the Ministries of Education (Ministério da Educação [MEC]) and Science, Technology, Innovations, and Communication (Ministério da Ciência, Tecnologia, Inovações e Comunicações [MCTIC]). CAPES, linked to the MEC, establishes assessment indicators for graduate-level assessment, allocates resources to a graduate support program called "Proap," grants scholarships to researchers at various levels, and establishes criteria for the qualifications of academic journals. The National Council for Scientific and Technological Development (Conselho Nacional de Desenvolvimento Científico e Tecnológico [CNPq]), linked to the MCTIC, also uses teaching performance indicators to determine the recipients of scholarships and financial support.

This performative culture impacts the professor's actions and "alters the nature of the soul of the graduate professor/researchers' and the professors' relationships with each other, contributing to these relationships being guided not by solidarity but by competition" (Moreira, 2009, p. 32), manifesting itself in psychological pressure, stress, and the rhythm of teaching, as well as bullying (Pita, 2010).

At the institutional level, fostering research internationalization can also be considered an action that impacts academic productivism because it encourages the construction of strategic internationalization plans and the strengthening of research networks with international researchers. A clear example of this policy is the Institutional Internationalization Program called CAPES PrInt (Capes, 2017), which aims to improve the quality of graduate-level publications and the mobility of researchers.

Institutional public policies, defined at the governmental level, are fundamental to the development of a country and aim, above all, to improve its position in the international rankings of scientific production. On the other hand, they also cause anomalies regarding academic productivism when they are not properly managed or when research institutions do not provide adequate working conditions or financial support for the realization of internationalization.

There is an expectation that the changes proposed by CAPES for the quadrennial assessment in 2021 will promote reflection within the academic community, since the quality and impact of the descriptions of items related to the "developing scholar" and "impact on society" elevate the value of qualitative actions associated with one of the fundamental dimensions of public education policies, the development of future professors and their destiny and performance, which must be re-signified in the context of graduate studies in management to "contribute to the solution of the chronic problem of uncompensated development" (Silva & Costa, 2014, p. 35), that is the result of a culture of academic productivism that may be compromising the career prospects of young professors and researchers.

The institutional dimension of productivism creates an isomorphic logic in all dimensions (coercive, mimetic, and normative) proposed by Dimaggio and Powell (2005), which is characteristic of Brazilian graduate studies in general, especially in the field of management and its subcategories. This logic causes academic productivism at the institutional level to lead to a precarious situation.

Academic productivism and the precariousness of professors' work in higher education institutions

At the institutional level, academic productivism has caused many problems for researchers because many universities, departments, and GPs pressure their professors to publish articles in high-impact journals because the universities want to

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position themselves competitively against other institutions and courses of study, as has already been indicated by Nkomo (2009). CAPES itself has an institutional assessment that classifies GPs based on such a ranking, which creates institutional pressure on professors.

On the other hand, the lack of appropriate working conditions in most institutions, especially in the context of public universities, as well as the need to reconcile teaching with research, academic, and management activities, has led to a precarious work process, since the time dedicated to each of the various activities winds up hindering the capacity of the professor to address the various institutional demands. The precariousness of teaching is more subjective than objective (Bernardo, 2014).

For Santana (2011), the workload of a graduate-level instructor consists of more than 40 hours per week of exclusive dedication to various duties. This workload consists of teaching, academic supervision, management of research projects, acting in administrative positions at the university, participation in scientific events and assessment boards of master's dissertations and doctoral theses, and preparation of academic papers for publication.

In a study of graduate-level professors in management, based on an analysis of the sociology of science, Melo and Serva (2012) found that the professors under investigation had a workload of approximately 50.65 hours per week, which is considered excessive. Of this weekly workload, 46% was comprised of teaching (preparation and teaching, supervising); 24%, research; 19%, bureaucratic activities; 8%, article reviewing and participation in scientific cooperation networks; and 3% was dedicated to extra activities. One of the most interesting and disturbing results revealed in the survey was that 47% of hours spent engaged in research were on weekends.

Teaching is precarious because its professional practice is marked by the diversity and complexity of its activities, which demand great versatility, dynamism, and high personal costs. In addition, according to the results of the study, research activities, regarded as the most important aspect of graduate-level teaching, tend to take place outside the work environment at the university, in a social space that should be dedicated to private life. A question indicated by Melo e Serva (2012) serves as a motivator for reflection on the subject: What are the risks of being a research professor in this context, with a workload that exceeds 50 hours per week?

Academic productivism may be associated with the precarious nature of postgraduate work, because the time devoted to teaching activities hinders the professor's dedication and productivity in relation to research, and vice versa. Regarding this context, some strategies are being adopted mainly to comply with the requirements of academic publication. One of them involves ceremonial co-authoring (Rossoni, 2018), a type of co-authoring in which the author does not contribute or, at best, makes a marginal contribution to the preparation of a paper for publication. Another involves writing papers on certain subjects, like an assembly line in a "paper factory" (Bispo & Costa, 2016). Reflections on academic publication and productivism can also be found in Alcadipani (2011) and Godoi and Xavier (2012).

The pressure to publish may end up compromising one of the most important and essential dimensions of graduate programs: the development of scholars through teaching activities. On the other hand, teaching needs to be rethought, as it is common in many GPs in management for professors to author an excessive amount of texts (books and papers), many of them in English, with classes being an event for students to discuss them, by way of seminars, leading them to take a more active role in conducting the class.

What are the professors' role in graduate studies in management? How can they awake the critical and reflective spirit of students from theoretical discussions of a subject or subareas of knowledge to help them become proactive in the learning process? The time devoted to teaching often winds up being compromised by the productivist logic created by a system in which the indicators established by the professors in a field determine certain behavioral patterns, leading them to adopt teaching strategies that do not promote the development of theoretical, epistemological, or methodological competences (Silva & Costa, 2014), for example, or a more meaningful and transformative learning process (Lima & Silva, 2018).

This context can create anomalies in the training of young researchers, who learn, for example, to write papers as a requirement for studying a subject (Bispo & Costa, 2016), sometimes making little contribution to the field and having difficulty successfully passing exams for the position of assistant professor because of their low level of theoretical competence and lack of substantive knowledge of a field of management.

This highlights that fact that the logic of the precarious work done in the context of GPs also causes issues associated with health and well-being at work. Many professors experience health problems that are closely associated with their working conditions, and in the most serious cases, these problems also wind up affecting students' health, creating a vicious circle of physical and mental illness. This perspective characterizes the individual dimension of academic productivism.

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Academic productivism, well-being, and the professor's health: publishing is necessary, but so is living well

The logic of productivism associated with publication has considerable implications for the professor. Miller, Taylor, and Bedeian (2011) analyzed the effect of pressure to publish papers and found a positive relationship with stress (mental tension associated with pressure) and burnout (a feeling of emotional exhaustion due to the pressure to publish) and a negative relationship with job satisfaction that characterize the publication process. This indicates that there is a relationship between a pressure-filled environment in which it is necessary to publish and its consequences for professor well-being. Many professors refrain from sharing their physical and psychological health problems or are slow to recognize them "for fear of being seen as incapable" (Pita, 2010, p. 15).

In the individual dimension of academic productivism, the impact of productivity on professors' health and well-being are analyzed. Reflecting on the individual level is critical, because the professor's freedom to choose whether to work in a graduate program is marked by both professional dilemmas and factors associated with private life.

De Paula and Boas (2017) point out that the context of such precarious work brings consequences for the physical and mental health of professors and can cause various mental and behavioral disorders, such as depression, anxiety, stress, and alcoholism, a phenomenon that has also been addressed by Sguissardi and Silva (2009), Santana (2011), Godoi and Xavier (2012), Bernardo (2014), and Rigo (2017). The health problems of professors can also affect relationships with students and even lead them to develop mental and behavioral disorders of their own, creating a vicious circle that undermines the entire graduate school system.

Sguissardi e Silva (2009), after conducting research with professors at seven federal public universities, concluded that the precariousness of teaching has caused existential dilemma, health-related issues, personal problems, psychological distress, and relationship issues. Santana (2011) conducted a study with 914 CNPq research productivity scholarship recipients with a hypothesis that, the higher the number of publications and the number of students advised in a program, the higher the average occurrences of cardiac intervention, coronary heart disease, and stroke (hemorrhagic and ischemic) would be, which was confirmed. These problems often occur due to a lack of physical activity, an unbalanced diet, and an absence of medical checkups, justified by overtime and the need to keep GPs' quality indicators and curricula up-to-date.

For Godoi and Xavier (2012), these behaviors are suicidal and are consequences of a set of anomalies in the health situation of the researcher-professor, and they conclude that it is urgent to reflect on the effects of chronic overtime on personal life. To meet the governmental and institutional policies governing graduate studies, professors must better manage their emotions and find ways to preserve their well-being.

In a study conducted with professors of a federal public university in Brazil, Bernardo (2014) analyzed the subjective precariousness of professors and found the existence of mental exhaustion, psychic suffering, and illness, which was ratified by Rigo (2017) when highlighting that the "politics" of academic productivism have effects on the psyches and health of researchers.

Regarding the term "perish" as representing the exclusion of professors from the graduate school system when they do not meet the requirement for publication, in this dimension of academic productivism, perishing does not only mean being excluded from GPs, but a process of physical and emotional illness that, many times, occupies an invisible dimension in teaching practices because the professor does not recognize the physical and emotional problems or establishes a process of emotional avoidance to avoid facing the issue. In the long term, emotional and behavioral disorders due to stress (Pignata et al., 2018) and burnout (Chang, 2009; Ghanizadeth & Hahedizadeh, 2005), for example, can lead to absence from work because burnout is a "syndrome" caused by prolonged stress and is related to the work environment (Chang, 2009).

In the field of management, many senior professors who have made major contributions to the training of professors and researchers in the field are excluded from graduate programs because they no longer meet the criteria of publication. In fact, many of them have become ill throughout their lives, and one of the consequences of these problems is a decrease in publication output, which should not be a mechanical process, but an intellectual process of reflection. Despite being excellent postgraduate professors, admired by students as for their knowledge, such professors end up being excluded from the system and treated as "merchandise" that has lost its value; however, such professors should not be excluded from the system solely because of low publication volume because their expertise in other dimensions, such as teaching, supervision, and management, should be assessed as central to the performance of a GP.

This is a face of academic productivism that must be researched and discussed both at the institutional level, as in the CAPES forums, at the events of the National Association of Graduate

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Studies and Research in Management (Associação Nacional de Pós Graduação e Pesquisa em Administração [ANPAD]), among others, and in the context of universities and graduate programs.

FINAL REFLECTIONS: WHERE ARE WE GOING?

Graduate studies programs in Brazil are experiencing a moment of crisis, which is not only associated with a lack of resources, but also with the need for better demarcation of the educational duties of professors and researchers in all fields of knowledge. In the management field, the discussion about professor and researcher development has already been addressed in publications and forums held within the scope of ANPAD events, especially the National Meeting on Teaching and Research in Administration and Accounting (Encontro de Ensino e Pesquisa em Administração e Contabilidade [EnEPQ]), and at the GPs forum of the Brazilian Society of Public Management (Sociedade Brasileira de Administração Pública [SBAP]).

As a multilevel phenomenon, academic productivism is becoming one of the great challenges of graduate studies in Brazil, especially because of the consequences it can have for institutions, professors, and scholars. This discussion should be part of the agendas of graduate programs, CAPES's area advisors, university managers, and funding agencies (CAPES and CNPq).

From the reflections presented in this paper, it can be seen that multilevel academic productivism is considered a complex phenomenon resulting from government policies and performative institutional actions, which involve not only the quantity and quality of publications, but also indicators of educational productivity, research, advising, and other academic activities of the teaching profession that are isomorphically institutionalized and affect the working conditions and physical and psychological well-being of the actors in the postgraduate context.

The phenomenon is systemic and multilevel because it influences, and is influenced by, several actors, such as the government, the higher education institutions with CAPES accredited programs, collegiate programs, and program coordinators and professors. Productivism also has several dimensions, but publication assumes a predominant and highly valued role for much of the academic community in the field.

In discussing productivism from a multilevel perspective, I hope to draw the attention of researchers in the field to the fact that the main victim of academic productivism are the professors and to reflect on the consequences of the system on their health and well-being as a warning about the future of the graduate school system.

Thus, the great challenge for all researchers in management and its subcategories is to foster opportunities to discuss alternatives to academic productivism; the first one involves discussing the process of assessment in the field. Breaking the productivist logic is not an easy process because there is a relationship of dependence between the community of a specific field of knowledge and the dimension of productivism at the institutional level in the context of public policies and the country's positioning strategies regarding rankings of worldwide intellectual productivity.

Publication is the main instrument of the productivist orientation prevailing in graduate programs nowadays. We must reflect on the personal cost that this logic can demand in the relationship between work and personal life, health and disease, and happiness and depression. On the other hand, the notion of academic productivism reaches many full professors in teaching and research in graduate management programs who, regarding reduced academic productivity and retirement prospects, reduce their interest in academic productivity and end up being "discarded" by graduate programs, disregarding their careers and legacies as professors and researchers.

Recovering the identity of teaching in graduate-level management studies is an opportunity to rethink the field's mission and values, as well as realize that future master's and doctoral students must be trained to regard teaching and research as integrated, inseparable dimensions of teaching practice. However, this goal may become increasingly difficult to reach because the environment of a scholar's development is currently marked more by pressure and psychological suffering than by a process of consistent academic development, both theoretically and epistemologically.

This environment is being created because frequent publication is necessary, but students often wind up producing papers that do not contribute to the advancement of the field, serving only to "fatten" their curricula and contribute to the goals of professors and advisors. This behavior not only emphasizes the logic of ceremonial co-authoring discussed earlier, but it can also create an assembly line for publication that adds no substantive value to knowledge of the field.

Graduate publication in Brazil has become an anomaly created by the institutions' reward systems, the CAPES assessment criteria, and the project evaluation and research productivity scholarship criteria, the consequences of which have already been discussed by several researchers, such as Alcadipani (2017), Rigo (2017), Rossoni (2018), and Bispo (2018), demanding a critical reflection from the academic community on the direction of graduate school assessment processes, journals, and the researchers themselves.

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Does the maxim "CAPES is us!" still prevail, and is our reality socially constructed or imposed on us by an institutional, reified process that makes us producers and consumers of a performative commodity called academic productivism? What collective strategies can we think of to address its consequences? Will the dimensions and indicators proposed for the next quadrennial assessment in 2021 promote changes in the way that academic productivism is conceived in the context of graduate studies in Brazil?

In the final reflections of this paper, the question "Where are we going?" involves examining which possibilities, routes, and itineraries that the management field itself must follow and which will materialize in assessment indicators. Thus, it is hoped that this proposal for the analysis of multilevel academic productivism will serve as a warning because the trajectory of graduate studies in the field of management is the responsibility of every professor in the community, and reconciling conflicting interests is not an easy process.

It is possible to think about strategies that minimize the impact of multilevel academic productivism on graduate studies in management, provided that the academic community in the area discusses, through forums, alternatives to the performative commodity of scores, metrics, and ranking and reflects on strategies and actions for the academic development of professors and their potential economic, social, and cultural impact on the country, considering its diversity and unique regional contexts.

Rethinking, for example, the economic, cultural, and social impact of a graduate program, which, as commodities, still have little weight in the assessment process, as well as the commitment of GPs to the training and development of the scholars in the program, are some guidelines that can serve as a reference for initiating a community debate.

Appreciating the role of research groups in the CAPES assessment is also an alternative for recognizing the joint, active work of researchers involved with GPs based on the results achieved through formative actions, community interaction, and student participation.

Multilevel academic productivism is much more than "publish or perish" jargon. It is a performative act that institutionalizes a set of actions and behaviors, characterizes a form of social representation of a field of knowledge, delimits a system of beliefs and values oriented towards a performative culture socially integrated into the actions of public and private actors as well as GPs, and affects the working conditions, health, well-being, and careers of professors in the field's community.

We have to find alternative ways to "denaturalize" this performative logic and create a space for reflection so that we can define strategies to reconcile academic performance with the need for good working conditions and relationships, actions that will preserve the quality of life and health of professors and students to make postgraduate education a social space mediated by positive experiences meant to educate and train professors and researchers in search of a better society for all.

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ARTICLES

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SUSTAINABLE HUMAN RESOURCE MANAGEMENT AND SOCIAL AND ENVIRONMENTAL RESPONSIBILITY: AN AGENDA FOR DEBATE

Gestão de recursos humanos sustentável e responsabilidade socioambiental: Uma agenda para debates

Gestión de recursos humanos sostenible y responsabilidad socioambiental: Una agenda para debates

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ABSTRACT

This paper discusses five propositions that aim to reinterpret roles in contemporary Human Resource Management (HRM) as pro-business, inclusive, focused on the long-term sustainability of organizations and individuals, and beyond the immediate interests of shareholders. The propositions place relations between people at the center of HRM. Doing so requires an ethical and plural analysis of the field as it evolves and commits to new priorities and phenomena in the area. In fact, HRM has not yet clarified its role in sustainable management, and it is still at the margins of socio-environmental responsibility strategies. The debate allows for an approach that goes beyond how companies perpetuate social and environmental issues in the world of work and in the society.

KEYWORDS | Sustainable management, human resources management, corporate social-environmental responsibility, sustainability, stakeholders.

RESUMO

Este ensaio discute cinco proposições a uma agenda cujo desafio é reinterpretar papéis da Gestão de Recursos Humanos (GRH) na contemporaneidade, segundo uma orientação pró-negócios e inclusiva, focada na sustentabilidade de longo prazo de organizações e pessoas, expandindo sua ação para além dos interesses imediatos dos acionistas. A agenda proposta considera que as relações entre as pessoas estão no centro da GRH, o que demanda um projeto ético e plural de análise do campo e das organizações, que avance em se comprometer com novas prioridades e fenômenos da área. A agenda é importante porque a GRH ainda não consolidou a reflexão sobre seu papel na gestão sustentável, para além dos limites organizacionais e das questões ambientais, estando à margem das estratégias de responsabilidade socioambiental. O debate acaba por permitir uma abordagem que vai além da forma como as empresas reproduzem mazelas no mundo do trabalho e na sociedade.

PALAVRAS-CHAVE | *Gestão sustentável, gestão de recursos humanos, responsabilidade socioambiental empresarial, sustentabilidade, stakeholders.*

RESUMEN

Este ensayo discute cinco propuestas a una agenda cuyo desafío es reinterpretar papeles de la Gestión de Recursos Humanos (GRH) en la contemporaneidad, según una orientación proempresarial e inclusiva, enfocada en la sostenibilidad a largo plazo de organizaciones y personas, que expanda su acción más allá de los intereses inmediatos de los accionistas. La agenda propuesta considera que las relaciones entre las personas están en el centro de la GRH, lo que demanda un proyecto ético y plural de análisis del campo y de las organizaciones, que avance en comprometerse con nuevas prioridades y fenómenos del área. En efecto, la GRH aún no consolidó la reflexión sobre su papel en la gestión sostenible más allá de los límites organizacionales y de las cuestiones ambientales, y está al margen de las estrategias de responsabilidad socioambiental. El debate acaba por permitir un enfoque que va más allá de la forma en que las empresas reproducen las contrariedades en el mundo laboral y en la sociedad.

PALABRAS CLAVE | *Gestión sostenible, gestión de recursos humanos, responsabilidad socioambiental empresarial, sostenibilidad, stakeholders.*

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INTRODUCTION

The debate on sustainable management brings Human Resource Management (HRM) closer to other fields and research streams such as green HRM (Renwick, 2018; Renwick, Jabbour, Muller-Camen, Redman, & Wilkinson, 2016) and sustainable HRM (Ehnert, Harry, & Zink, 2014; Kramar, 2014). However, this debate is too focused on the green economy, environmental issues, and the related consequences for HRM (Ehnert & Harry, 2012; Jackson, Renwick, Jabbour, & Müller-Camen, 2011) and only partially reflects the reality of developing countries, where these are socio-environmental challenges affecting individuals and communities at the margins of global production chains.

While the relationship between HRM and sustainability in production chains has been established as a key challenge (Becker, Carboli, & Langella, 2010; Jabbour & Jabbour, 2016), the discussion about the role of HRM in organizational change in sustainable organizations is still emerging. HRM has not yet established its role in sustainable management beyond organizational boundaries and environmental issues and is still at the margins of socio-environmental responsibility strategies (Fenwick & Bierema, 2008).

This essay follows other authors in search of an approach to HRM that goes beyond how organizations reproduce chronic problems in the workplace and in society (De Prins, Van Beirendonck, De Vos, & Segers, 2014; Macke, Genari, 2019). The debate on HRM socio-environmental responsibility has advanced from many perspectives and can provide promising frameworks to support the translation of corporate social responsibility (CSR) strategies into managerial actions and outcomes that are relevant to all stakeholders (Jamali, El Dirani, & Harwood, 2015; Järlström, Saru, & Vanhala, 2018).

Recognizing this potential is important as it reflects the current literature that addresses how companies reproduce poverty (Hamann & Bertels, 2017) or why they should contribute to fight it (Blowfield & Dolan, 2014; Blowfield & Frynas, 2005; Boyle & Boguslaw, 2007; Jenkins, 2005; Newell & Frynas, 2007), especially in developing countries with regard to workplace issues (George, Howard-Grenville, Joshi, & Tihanyi, 2016; Lebaron, 2018; Mascarenhas, Gonçalves-Dias, & Baptista, 2015; Phillips & Sakamoto, 2011; Tonelli, 2017).

Thus, far from overcoming the theoretical and practical challenges facing HRM, this essay notes their small impact on the modus operandi of human resources (HR). The continued emphasis on themes associated with organizational behavior prevails, while discussions go on about the robustness of studies that leave interpretative margins about practice in organizations. As the debate on sustainable management is introduced, it becomes evident that a new agenda needs to be articulated by means of propositions whose challenge is to reinterpret HRM roles according to a pro-business, inclusive approach focused on the long-term sustainability of organizations and people.

The agenda proposed here considers that human relations are at the center of HRM and requires an analysis that is committed to new priorities and phenomena in the area. In the current debate, there are trends indicating a greater recognition of the role of HR, with broad consequences to its orthodoxy. The theories and concepts discussed should go beyond the classic description of HR sub-areas and advance over other fields of management, with a greater intertwining of approaches.

IN SEARCH OF A FRAMEWORK

HRM takes on different perspectives, thus building approaches that aim to consolidate a continuously changing field and incorporate aspects that are present in the organizational context. It takes on both subjective and objective dispositions which are dynamic and historically constructed. It is an ethics-sensitive field, and its impact on people is biased by idiosyncrasies and particularizing interpretations that shape their action strategies, particularly regarding its managers.

> It can be argued that the nature of the HR manager's role, and any aspiration to what Kochan (2007) terms 'social legitimacy', requires them to retain an ethical stance and to pursue the ethical possibilities that arise. They might do this through seeking a 'strong' HR system, through alliances for policy formulation and implementation, by seeking opportunities to promote worker well-being and more generally by seeking to make ethical choices whenever the opportunity arises. To do so requires a strong sense of self-efficacy to sustain even an element of an ethical stance in challenging times and unfavorable contexts. Realistically we must accept that the constraints on and the boundaries of the HR role confirm that we should not look with any confidence to HR managers to ensure an ethical HRM (Guest & Woodrow, 2012, p. 118).

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Thus, it is necessary to introduce sustainability as a concept associated with the long-term maintenance of systems, taking into account economic, social, and environmental aspects (Crane & Matten, 2010; Freitas, Souza, Teixeira, & Jabbour, 2013; Jabbour & Santos, 2008; Parente & Fischer, 2014). Following this line of thought, the idea of sustainable development (SD) provides the historical and contemporary socio-political context in which HRM is situated (Chams & García-Blandón, 2019).

SD is understood as the development standard that meets the needs of the present generation while preserving the ability of future generations to meet their needs (Guzmán, 1997). It refers to shared governance processes and assumes that resources are finite and therefore, it is necessary to prevent their depletion while also ensuring the conservation and renewal of natural and human resources, respect for human rights, and promotion of social justice. This involves reviewing companies' activities in the capitalist production-consumption system (Barbieri, Vasconcelos, Andreassi, & Vasconcelos, 2010).

SD encompasses both corporate sustainability (CS) and CSR, notions that have converged in their similarities (Steurer, Langer, Konrad, & Martinuzzi, 2005). It requires adopting business strategies and practices that meet stakeholder expectations while protecting, maintaining, and renewing resources for future generations. Companies are subject to pressure for greater transparency and interaction with stakeholders, and the social and environmental aspects of their performance in the production chain are evaluated due to the growing interconnection, interdependence and transactivity of organizations (Barbieri et al., 2010; Kolk, 2016; Schoemaker, Nijhof, & Jonker, 2006).

In HRM, thinking about the sustainability of work and employment systems becomes necessary in view of phenomena such as climate change, precarious labor trends, and the impacts of the Fourth Industrial Revolution (Schwab, 2016). Sustainable labor systems presuppose that the management of labor relations goes beyond behavioral and economic issues, since minimizing the human, social, and environmental damage generated in these relationships is the responsibility of both businesses and society (Docherty, Kira, & Shani, 2009; Elkington & Rowlands, 1999).

Thus, we must expand the definition of the field to "institutions, discourses and practices focused on the management of people within an employment relationship enacted through networks comprising multiple public and private actors" (Voegtlin & Greenwood, 2016, p. 182), with HRM's socio-environmental responsibility being the "human resource management practices and strategies politically contested between companies, government and civil society around stakeholder interests in changing institutional, social and business contexts" (Voegtlin & Greenwood, 2016, p. 182). This conception emphasizes the political and institutional dimensions of HRM and goes beyond the functional boundaries of the field. These paths are necessary because mainstream HRM has shifted toward strategies to the detriment of people and does not prioritize companies' long-term viability. This neglects the role of HRM in renewing, raising, and reproducing the resource basis upon which companies and communities depend (Van-Buren, Greenwood, & Sheehan, 2011; Pfeffer & Salancik, 2003).

Indeed, it is important that HRM recognizes new potential frontiers and gains further understanding of the territorial dimension of its activities (Christophe & Glée, 2014). This is because work generates value in global production chains across networks of companies located in different territories where they have varied impacts. It is worth noting that by territory we mean not only a geographical space, but also a social and cultural space where innovations occur over processes of identity creation or feelings of belonging (Santos, 1999). As companies recognize their dependence on the natural and human resources and social capital in their territories, they must integrate their SD goals and processes in these territories.

For Bories-Azeau, Defélix, Loubès and Uzan (2015), issues arising from the opening of HR to the territorial space can expand the field's scope of action to include, for example, the impacts of the current productive restructuring and local demands for new competences, while preserving the environment and respecting human rights in projects related to innovation and social and environmental responsibility. The environmental dimension of SD calls for global solutions, as its risks are not limited to well-defined political or organizational boundaries. However, intervention instruments are led to dialogue with local features and demands, which means that HR is called upon to contribute to broader projects. These involve multiple actors that mix private and public logics of action according to a concept of company that is based on partnerships and socially involved in territories (Uzan et al., 2017).

According to Costa (2002), companies allocate social investments to their own staff and the geographical surroundings of their industrial plants by funding sports and leisure areas, schools, and social policy providers. However, building sustainable labor systems depends on coordinated action between governments, organized civil society, and companies. For Wildhagen, Teodósio, Mansur, and Polanco (2015), starting from the territory to approach sustainability implies considering the territory as a whole in which different actors converge, including the company, which requires problematizing their different capacities in terms of power relations in space.

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Territories' sustainability requires the operation of different actors; the involvement of society, government, and private organizations; and requires problematizing it from the territory itself (McLennan & Banks, 2019), without necessarily assigning a central role to the company. When encouraged to design and implement their own locally controlled development strategies, communities undergo social and economic changes that do not necessarily depend on corporate intentions or investments. The features of a territory (labor market, natural resources, institutional relations, productive structure, entrepreneurial and business capacity, and political culture) can be enhanced to generate economic growth and improve quality of life for the population.

In sum, sustainable HRM starts from the notion that the various facets of managerialism are reflections of the sociopolitical environment, an environment that is uncertain, unstable, and contested. The organization contributes to SD by delivering economic, social, and environmental results, also referred to as the triple bottom line of companies (Hart & Milstein, 2003). In a sustainable HRM agenda, the economic pillar refers to building solutions that ensure viability, competitiveness, and legitimacy for companies over the long term. The social pillar presupposes an ethical standard in work and employment management systems that pursues the renewal, regeneration, reproduction, and rise of human resources and social capital, while meeting stakeholders' needs (Guerci, Shani, & Solari, 2014; Phillips, 2003). The environmental perspective lies in the interrelationship between work and the environment (Zink, 2014). The environment is the set of physical, chemical, biological, and social components which can cause direct or indirect effects on living beings and human activities (Organização das Nações Unidas – ONU, 1972).

Sustainable HRM suggests that management's various levels of influence should receive attention because it recognizes the growing political power of companies and the reduction of state control over labor relations. It recognizes that public policy in many countries has failed to respond to changes in employment relationships to the benefit of employees. It also rejects the fallacy of relationships being shaped by free, fair, and independent parties (Dobbin & Sutton, 1998; Legault & Bellemare, 2008). Although businesses' responsibility to provide relief for chronic issues is quite controversial (Bosch-Badia, Montllor-Serrats, & Tarrazon, 2013; Freeman & Liedtka, 1991; Friedman, 2007; Porter & Kramer, 2006), responsive companies provide education, healthcare, and work and promote human rights and social justice (Singer, 2006; Valente & Crane, 2010). However, the HRM arena fails to confront its problems, considering them inevitable (Thornley, Jeffreys, & Appay, 2010).

In light of the above concepts, how do we make HRM practices evolve so as to ensure sustainability? HR practices are managerial tools that meet the needs of the company or its territory with impacts that they must predict; these tools must also address economic, social, and environmental aspects. Therefore, we present a five-topic agenda whose challenge is to reinterpret the roles of HRM in contemporary times.

AN AGENDA FOR SUSTAINABLE HRM

First proposition: To overcome inconsistencies in HRM

This proposition considers that HRM research and practice have always coexisted with multiple ethical compromises and contradictions in view of the attempt to mediate the needs of individuals at work.

The HR function faces its social legitimacy as it has lost moral authority due to the ambiguity that marks its performance (Kochan, 2007). The pursuit of ethical principles stumbles when HR seeks to improve its status by acting from within the management system, thus producing speeches according to management priorities, which may represent factors of negative impacts on individuals (Guest & Woodrow, 2012; Nishii, Lepak, & Schneider, 2008).

In terms of idea generation, this reflects on the quality of scientific output (Mascarenhas & Barbosa, 2013). It also bears the mark of being historically associated with an ambiguous and operational position, with little power in the organizational context (Farndale & Hope-Hailey, 2009; Guest & King, 2004) and focused on rigid control practices and normative and assistance mechanisms for employees.

Although the HR activity still has a relatively low organizational status, lacking even a formal directive position on organizational boards, paradoxically, there is a strong discourse of appreciation of individuals in organizations. In other words, the discourse about recognizing the individual is ironical considering that the HR activity still occupies a secondary position in the face of organizations' real demands and strategic decisions, thus preventing HRM professionals from actually working on stakeholder interests.

One feature that stands out is the excessive "behavioralization" of HRM practices, heavily attached to the traits and characteristics of individuals. This situation shows HR's difficulty in gaining a strategic position and reveals the lack of integration with other areas. Additionally, HR faces difficulties in overcoming an overly static approach with prescriptive values that

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determine its functionality. The sum of this equation eventually impacts directly on the area's legitimacy.

The promise of strategic HRM was to give people recognition as long as they are aligned with managerial views. According to Greenwood and Van Buren (2017), the unitarian premise ("we are all part of one team") presupposes managers' responsibility to maximize shareholder value and a resistance to recognizing divergent interests. Thus, managers have an ethical responsibility to work toward making the interests of employees and employers converge, (Friedman, 2007) possibly to the detriment of other stakeholders (Freeman, Harrison, Wicks, Parmar, & de Colle, 2010).

It can be assumed that mainstream research is reductionistic because it is based on biased ideological constructions, the result of which are successive waves of managerial discourses (Barley & Kunda, 1992). In this context, there is abundant research on the hypothesis that HRM practices positively impact company performance, despite many doubts regarding how to identify and measure HR's contributions (Fleetwood & Hesketh, 2006).

This first proposition starts from the idea that the legitimacy of HRM as a historically consolidated knowledge area is associated with the search for sustainability by managing relations between people. This requires reevaluating theoretical frameworks in order to overcome their inconsistencies (Caldas, Tonelli, & Braga, 2011; Delbridge, Hauptmeier, & Sengupta, 2011; McLennan & Banks, 2019). Making sure that "relations between people" are at the center of HRM is more appropriate than accepting unitarism, since Management field incorrectly assumes that systematically controlling social relations is possible (Grey, 2004).

Following this line of thought, the dispute over the terminology of the area (personnel management vs. strategic management of people; human resources management vs. people management) becomes fallacious. The people addressed by HRM demand a plural and ethical project of analysis of the field and of organizations defined in relational terms; a project to encompass multiple stakeholder demands, recognize changes and interrelationships between local and global contexts, and advance in committing to the area's new priorities and phenomena (Bradbury & Lichtenstein, 2000; Brès, Raufflet, & Boghossian, 2017; Rowley, 1997; Watson, 2005). The next propositions deal with this project.

Second proposition: To understand and incorporate new understandings about HRM ethics

Mainstream HRM does not recognize the boundaries of the unitarian premise. Studies on ethics and HR criticize the usual economic notion of human resources that makes them manageable as non-human resources to be exploited and abandoned (Gama, McKenna, & Peticca-Harris, 2012). Moreover, these studies indicate gaps such as the limited impact of stakeholder theory on mainstream HR, since the former does not recognize the relationship between the individual and the company as essentially moral, but only as instrumental to the organization (Greenwood & Cieri, 2007). The notion of ethics refers to the application of reason to set specific rules and principles that differentiate right from wrong in a given situation or context. Morality refers to beliefs throughout social processes that inform individuals about right and wrong (Crane & Matten, 2010). When it comes to ethics in organizations, the subject often refers to controlling the behavior of individuals to restrict them to what is acceptable in business, with standards of conduct to manage the risks of unethical behaviors.

Recently, the perspectives of various HRM stakeholders have gained more attention (Beer, Boselie, & Brewster, 2015). Addressing multiple HR stakeholders emerged at the birth of strategic HRM through the "Harvard model" (Beer, Spector, Lawrence, Mills, & Walton, 1984). Understanding labor relations as relations between stakeholders opens the ethical analysis to the pluralism and pragmatism that this theory offers. There is a need for HR to adopt a broader understanding of humanity as a requirement to treat its stakeholders as moral subjects and more sophisticated judgments about what contemporary working relations entail (Kuchinke, 2010; Greenwood & Freeman, 2011).

Several authors point out the need to go further into the debate on the ethical dimension of HRM. From an ethical-normative perspective, HRM should recognize the nature of stakeholder management, assertively address how labor relations should be, and deal with the neglected demand for openly treating mutual gains, dignity, and well-being in stakeholder relations (Kochan & Osterman, 1994; Pirson, 2017; Teixeira, 2008). However, there are few studies on how HRM has been dealing with these issues practically (Braga, Kubo, & Oliva, 2017). Managing stakeholder relations is a historical process that goes beyond deconstruction and criticism to address normative issues and recognize reductionist tendencies of theories by accepting multiple ethical principles in analyses that are sensitive to sociopolitical contexts.

For example, sustainability and diversity have not yet been thoroughly connected to the broader debate on ethics and moral issues, and therefore a possible research agenda lies at the frontier of the fields of social sciences, philosophy, and Management (Davila-Gomez & Crowther, 2012; Jaime, 2009; Lucio, 2006). Within their scope, the company's commitments to the

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common good (expressed, for example, in the ways in which diversity and sustainability are embodied in management and business practices) should be problematized under the broader umbrella of ethical and moral issues (Teixeira, 2008). It is also undeniable that the massive use of information technologies in HRM has not defined its ethical foundations oriented to equity (Eubanks, 2018) and privacy. Strengthening an evidence-generating culture that feeds comparative studies and solid bases for theoretical and applied knowledge in HRM requires reflection, as well as defining homogenizing aspects for readings that consider particular cases and specific features.

Third proposition: To understand how company activities affect the resource base

Although HR cannot easily take on this capability, it must co-create organizational capabilities for this purpose. Among several possible justifications, Reed (2002) highlights the social obligations arising from authenticity (i.e., stakeholders' interests in keeping their individual and communal identities), which are dependent on the context in which the company operates, as well as on an understanding of past behavior in the relationship with local communities. In this millennium, HRM legitimacy is associated with acting on these fronts. For Kochan (2007), HRM "derives its social legitimacy from its ability to work as an effective lever for a social contract in labor relations that is capable of balancing and integrating the needs of employers, employees and the societies where they exist" (p. 600).

However, according to Marchington (2015), the HR function has been too focused on short-term performance metrics, neglecting other stakeholders' values and priorities. In a crisis of legitimacy, the challenge is to strike a better balance between speaking for employers and stakeholder interests. HRM's legitimacy stems from its ability to identify, gain knowledge of, and incorporate stakeholder interests into, decision-making processes, without affecting the company's ability to survive due to (i) lack of "license to operate", (ii) resource depletion by affecting the willingness or ability of individuals and institutions to provide capabilities to the company, and (iii) side effects or externalities of business activities that prevent the resource base from regenerating (Mariappanadar, 2014).

Sustainable work systems require that the research agenda penetrate views, be assertive about building bonds between people in the territories, and recognize human harm at work (exploitation, illnesses, dehumanization) and damage from resource exploitation (waste, degradation, deforestation, impoverishment) (Bales, 2004; Gudic, Rosenbloom, & Parkes, 2014). Sustainable HRM must explicitly identify negative impacts as well as positive impacts on stakeholders, pay attention to policy implementation processes, and recognize tensions in matching their requirements. This approach takes on explicit ethical positions as to the desired short- and long-term results with the HR stakeholders (Kramar, 2014; Maak, 2007). This change requires rethinking traditional short-term assessments exclusively oriented to the internal public and introducing it into the flow of discourses and frameworks of values and interests of sustainable management in the territory. These ideas suggest the next proposition, which emphasizes social and environmental responsibility at the different levels of HRM operations.

Fourth proposition: To work on the challenges of social and environmental responsibility at different levels of HRM

A pluralistic project for analyzing HRM recognizes the prevalent power of the company, its predominance in managing the psychological contract (Cullinane & Dundon, 2006), and the fact that the interests involved are not necessarily shared. This proposition suggests that HRM develop capacities and strategies in the local and global arenas to contribute to addressing chronic issues.

From an ethical point of view, Kuchinke (2010) proposes that HRM commit itself to development, as understood from Sen's philosophical perspective (2000), as a process of expanding people's real freedoms, i.e., their capabilities. HRM professionals are like agents of development who should question the conditions necessary for their stakeholders to realize their potential to enrich their lives by expanding their capabilities. Recognizing that investing in HRM is expanding people's capabilities means extending the HRM paradigm beyond the traditional short-term emphasis to make it dialogue broadly with stakeholders' expectations (Osranek & Kink, 2014).

We must ensure that alternative readings of the relationships between HRM constructs converse in order to prevent them from becoming 'umbrella' narratives that legitimize the interests of employers. For example, Ramsay, Scholarios, and Harley (2000) mark an alternative conceptualization of high-performance work systems from the viewpoint of labor process, practices that emphasize discretion at the expense of stress and intensification of work and serve as a key explanatory factor for performance improvement. However, HRM assumes that speaking of values associated with engagement and commitment,

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constructs valued by mainstream research, has a greater ability to persuade by connecting with emotions and affectivity. An alternative is to build common narratives that allow the various ethical perspectives to coexist and dialogue with one another (Greenwood & Van Buren, 2017).

For HRM to strengthen its position, it is necessary to understand political and social processes at different levels and in new perspectives of action. A promising path lies in facilitating research, dialogue, and action in spaces where policies are negotiated and established (Kolk & Tulder, 2006; Valente & Crane, 2010; Vianna, 2007). Institutional and political dynamics need to be explored along with the potential of new technologies for a disruptive HR agenda (Slavin, 2019). These innovations are justified because HRM produces discourses in a noble space in society: between organizations and people. It must devote itself to systemic change, beyond the dominant managerialism.

> For a variety of reasons – changes in employer preferences, globalization, and changing political philosophies to name three – public policy in several countries has failed to respond to changes in the employment relationship in ways that would have ultimately benefited employees. Despite any objections to the notion that protection of fair employment practices and vulnerable employees should remain the role of public policy and institutions, it seems apparent that this role is increasing being devolved to organizations and their HRM functions. Human resource professionals have more discretionary power over employment matters than in the past. In many ways HRM professionals are now expected to act as ethical stewards or the "conscience" of organizations (Van-Buren, Greenwood, & Sheehan, 2011, p. 211).

Fifth proposition: To develop responsive leadership capabilities for a new HRM environment

According to Maak and Pless (2006), responsive leadership is a social, relational, and ethical phenomenon that occurs along processes at the local and global levels in interactions between a multitude of stakeholders, and it seeks the common good in the territory. Responsive leadership requires citizen-like and visionary behavior in the face of critical issues in society; the ability to seek broader, more difficult consensus than usual in companies; and building common meanings for stakeholders by participating in SD processes from diverse perspectives and positions (Bradley, Mcmullen, Artz, & Simiyu, 2012; Maak & Pless, 2009). According to Maak (2007), responsive leaders build social capital by weaving networks of rich relationships for individuals who would otherwise be isolated. In doing so, they aggregate the energy of different political groups, sharpen world perspectives, provide quality and accessibility of information, and give attention to projects' contextual aspects and immediate interests, thus managing implementation priorities.

CONCLUSION

This agenda points to the relevance of an HRM that incorporates conceptual features of various theoretical or ideological frameworks arising from different knowledge areas. It is remarkable that the changes that society undergoes have so little impact on the modus operandi in HRM. In line with Dundon and Rafferty (2018), we reinforce the warning about the risk of HRM intellectual and professional impoverishment due to the uncritical adoption of a pro-market ontology rather than a pro-business, inclusive orientation focused on the sustainability of organizations and people.

As a specialist field, its contemporary approach can be associated not only with the technical mastery of its traditional processes, but with the reflection and action on the human condition over the processes in which strategies are built (Jarzabkowski & Fenton, 2006). Along these lines, procedural and relational views of HR-relevant phenomena (Watson, 2005) give the field new insights, as it becomes more connected to the community . The HR professional must be a special kind of "stranger" who is able to refer to his or her knowledge of history and theory, pays attention to critical faculties, acts autonomously in relation to power centers, and takes on the role of provoking well-informed stakeholder discussions on critical issues (Goldfarb, 2012).

Several authors speak of an HR approach that recognizes stakeholder interests and seeks potential contributions to policy debates about wider social challenges, including equal opportunities and inclusion in the workplace. Indeed, HR professionals operate in a complex world that requires balancing a variety of activities and outcomes. We propose that HRM practices should be able to encompass the ethical plurality found in stakeholders' interests without privileging particular views. Therefore, it is necessary to reflect further on HRM interactions with the various research

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areas associated with the understanding of historical, social, and productive dynamics that impact its stakeholders. This agenda also puts the field's scientific approach into debate, and to make studies more relevant, we need to expand the agenda. "The stakeholder approach will require qualitative, case-based studies also through action research, which is inexistent in current academic research" (Beer et al., 2015, p. 432).

In conclusion, this agenda leaves open many questions about territorial and knowledge boundaries. Sustainability also involves understanding and incorporating affirmative and inclusive actions, for example, in addition to those associated with the effects of technology on HRM. Moreover, it is necessary to reflect on how far organizations are willing to go in order to strengthen and recognize HRM as a privileged arena of debates that have impacts on organizational actions, whether strategic, instrumental, or functional ones. The sustainability debate, which pervades the organizational environment, emerges as an opportunity that highlights the importance of including people as protagonists, while ensuring an ethical role for HRM due to the complexity and controversy involved.

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ESSAY

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MARKETING TEACHING AND RESEARCH: THE RED PILL ALTERNATIVE

The first article I presented in a conference was a theoretical essay, although I had been warned that only empirical works would be selected. I do not know who the reviewers were, but they were certainly professors that appreciated and understood my concerns as regards teaching and thinking about marketing (Casotti, 1995). Here again, I have the opportunity to reflect on how challenging and motivating teaching marketing and developing research continue to be. The discipline has enhanced its important role, which was already perceived as being predominantly instrumental in decision making processes. The consumption of goods, services, ideas, and everything else involves not only the organization of corporations of diverse nature but also complex market relations and a number of social agreements.

From a macromarketing perspective, Mittelstaed, Kilborune, and Schultz (2015) address two perspectives that accompany the discipline of marketing. The negative perspective visualizes marketing as a source of human suffering. That is, it is a consequence of technological, political, economic, organizational, and competitive aspects that may hinder the creation of value for consumers, businesses, and society. On the other hand, the positive perspective looks at marketing as part of the solution for the human condition and a tool for the betterment of human life and economic development. The perspective I wish to consider for the discipline is the positive one, despite the fact that the following text deals with content more associated with negative aspects of the discipline. My belief is that valuable and instrumental reflections are derived from critiques that may contribute to the achievement of a more positive and optimistic future for marketing.

The expanding scope of marketing has led the discipline to become more reflective. It has also caused it to be studied more frequently as part of a sociocultural process that is integral to the very definition of a society. To reflect upon the perspectives, or upon what I expect for the discipline of marketing and marketing research, I choose to return to the past and present a bit of the recent history of this field of knowledge. In the text, I also share my own path as someone who works in marketing. Marketing and I have already taken the blue pill—the one of illusions and dreams—as portrayed in the movie *The Matrix* (Warner Bros Entertainment, 1999). Yet, some perspectives from the discipline of marketing and I have arrived at a certain moment wherein we need to face the red pill—which, in the movie, takes the character *Neo* out of the world of illusion. At the end of this paper, I will offer a better explanation for this analogy of *The Matrix* (1999) and the colored pills. I hope the reader will follow me up to this point.

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PAST: "THERE'S A DIFFERENCE BETWEEN KNOWING THE PATH AND WALKING THE PATH" (*MORPHEUS – THE MATRIX*, 1999)

Does marketing create needs and desires? This question was so recurrent in the marketing management classes that instead of answering it, I simply started to throw the question back

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to students, thus inspiring debates. During such interactions, I clarified that I was not there to praise marketing but to debate the beauty of the concept despite it being used in ways I recognized as unethical. This strategically disarmed beforehand those who were already prepared for a confrontation. During the course, I looked to move beyond the materiality that permeates the concept of marketing and discuss the cultural and social nature of desires and needs. Questions raised in the classroom aroused my suspicions regarding what I had read in marketing strategy textbooks or about the possibility of integrating marketing decisions with the intent of achieving more profitable results. Marketing textbooks had changed very little over the decades, while questions in the classroom were increasing. This is because students are also consumers: they know marketing and constantly challenge us. The adoption of active learning methods has been helpful for classroom dynamics.

In the history of marketing research, in the 1960s, 70s, and 80s, it was common for marketing professors to publish in the field's main journals. At the same time, they continued their activities in market research companies or consulting firms, as was the case with *Sidney Levy*, *Philip Kotler*, and *Gerald Zaltman*. In the 1990s, this scenario started to change, and conversations about distancing academic marketing research from the practice of marketing began taking place. In marketing research, there is a prevalence of studies with a positivist bias, with the predomination of surveys and experiments that focus on the purchase decision processes. The justification for this epistemological track in this nascent field was the desire to become recognized as a science. At this time, some thinkers considered marketing to be in a "middle-life crisis" (Brown, 1995), while others emphasized that the success of the field of knowledge, both within the academic and corporate areas, inhibited the innovation engine of marketing (Doyle, 1995).

It is also at this time that my crisis with marketing starts, after 10 years of enchantment, having abandoned economics. Looking for new directions in a time with no databases, in the middle of a dusty library, I found *Elizabeth Hirschman*, *Morris Holbrook*, *Russell Belk*, *Melanie Wallendorf*, *Lisa Penalosa*, and *Véronique* and *Bernard Cova*, and others. I am fascinated by the research interpretative approach and sociocultural perspective in consumer studies. This perspective comes closest to the construction of meanings, the history of consumers and corporations, and the formation of new social groups, which involve generational aspects, families' new configurations, and new urban communities. The diversity of contexts and qualitative research methods suggests a more inquisitive and human path for marketing.

The subfield of consumer behavior had become most relevant within marketing research. Nevertheless, at first, I did not grasp that the researchers I had started to follow were isolated from the establishment and power, as Bode and Ostergaard (2013) explain later. The authors claimed this distance as a necessary and important precondition for the development of a new way of thinking within marketing. Although it was not a premeditated choice, I read and shared with my students publications that were related to marketing dissident movements, such as the *Consumer Odyssey* led by *Russell Belk*. This movement contributes to shaping a new positioning and status for interpretative methods, as it brings together a group of researchers with rich and diverse backgrounds. These researchers produce valuable articles published in journals such as the *Journal of Consumer Research* and *Journal of Marketing*. Qualitative studies, still counting with little acceptance, began to be defended by other researchers such as *Evert Gummesson*, an important thinker from the Nordic school of service marketing. He argues in favor of moving marketing closer to qualitative methods. He explains how quantitative methods with a positivist bias are "overused" and "overrated" in the discipline a and contribute to distancing marketing from the "real reality" and humankind, something that takes the opposite direction of the soul of marketing concept (Gummesson, 2002, p. 344).

Other movements or claims have emerged in the discipline of marketing, as the ones arguing for the need to focus on the society's limited resources and environmental and social pressures (Laczniak & Murphy, 2012). This movement also advocates the inclusion of commonly neglected groups in marketing research, such as the poor, elderly, and disabled. These issues have started to gain space in marketing research and consumer behavior, as they did in my own research pathways (Hemais, Casotti and Rocha, 2013; Rocha and Casotti, 2018; Faria and Casotti, in press).

PERSPECTIVES: "DON'T THINK YOU ARE; KNOW YOU ARE" (*MORPHEUS – THE MATRIX*, 1999)

What is marketing? The first uncertainties are regarding the concept of marketing itself. Marketing is about the people inside and outside corporations. However, in a number of conceptualizations I have examined, people are not included in a clear way. Marketing is about the "how" and "why" of not only desires, feelings, fantasies, hedonism, and people's identities but also educational issues, prejudice, stigma, racism, vulnerabilities related to gender, and socioeconomic inequalities among people. There is no doubt that

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marketing is a complex and vulnerable concept facing diverse mass media texts that present recurrent associations between marketing and unethical sales and misleading advertising. Moreover, this discipline deals with negative associations when consumption is under criticism for obvious inequalities as regards access to products and services, among other negative attributes. The suspicions that have always surrounded the identity of marketing have also been fomented by proven criminal and unethical management practices. We have observed this in recent events in Brazil, where complaints, imprisonment, environmental disasters, and death paint an unfavorable scenario for business management in general and marketing in particular.

To deal with this negative perspective, this discipline needs courage and justice to face some "inconvenient truths," such as marketing practices that reproduce inhumane values. These include the construction of individual and collective identities related to aesthetics and racial and gender stigmas. We may also find examples within important market segments wherein marketing contributes to practices that are detrimental to people's health. This occurs in cases of, for example, consumption of cigarettes and other food categories and negligence regarding sustainability when it involves water consumption and generation of waste. These are some examples of practices that strengthen the arguments in favor of the need to reposition marketing within the social sciences (Layton, 2016; Löbler, 2016). How to make marketing concepts, principles, and practices a source of positive values such as altruism, empathy, respect, honesty, truth, integrity, justice, virtue, intelligence, and beauty?

The marketing discipline and research have been facing an impasse between the tracked pathways based on the recognition of the scientificism and search for new directions. This can bring more creativity to the field, allowing for more distance from the mainstream, which still obdurately follows the structure of harder areas of knowledge. Reciprocity does not come from different established fields of knowledge. Marketing uses inspirational theoretical, and analytical frameworks that have been established by research in these fields, such as economics, psychology, sociology, and anthropology, but such research rarely cites marketing studies in turn. Perspectives for the marketing discipline and research may emerge from a macro level or gradually and microcosmically. However, marketing strategies and consumption patterns should be adequate for a large population and less harmful to the environment.

Some recent research perspectives point to a direction indicating that marketing should accept its inconvenient truths, while challenging concepts that position the discipline as ideologically neutral without questioning aspects naturalized by the field. Researchers for macromarketing (Shapiro, Tadajewski, & Schultz, 2009) and critical marketing (Saren et al., 2007; Tadajewski & Maclaran, 2009) make relevant contributions to the field, helping to understand the structural consequences of marketing practices for the society. Martin and Schouten (2012) defend sustainable marketing when they acknowledge that marketing is the main agent promoting unsustainable practices among companies and consumers. The authors believe in marketing's ability to build a culture wherein sustainability becomes the main force. Other researchers also claim that sustainability is central to marketing transformation and supports the need for changing the discipline's core logics (Varey, 2011). Gopaldas (2015) proposes positive marketing as a subfield capable of creating value for companies, customers, and societies using its innovation process, which should involve both sustainable materials and clients' new competences.

Another research path is transformative consumer research (TCR; Mick, Pettigrew, Pechmann, & Ozanne, 2012), which has emerged from debates regarding the social impact and promotion of well-being in this research area. TCR investigates varied topics, such as injustices and consumer marketing discrimination, giving special attention to consumers targeted less by marketing research (Baker, Gentry, & Rittenburg, 2005). TCR embraces the promise of offering social benefits that contemplate the development of both academic and non-academic works, so that both sides may benefit through interaction and collaboration.

All these new research paths consider consumption as a process comprising learning, transformation, and human development. They also consider the existence of two sides in the consumption of goods, services, ideas, and technologies. They may please or frustrate, enrich or impoverish, empower or alienate, and nourish or destroy social relations. They may worsen social, cultural, environmental, and health problems. On other hand, they may bring alternative solutions capable of structuring processes that maximize improvements for individuals, groups, and social networks.

Another aspect affecting diversity in terms of research pathways concerns the means to evaluate academic production. The increase in the number of field journals and varied subject matters suggests that the area of knowledge is experiencing a boom. There is an agreement as regards the quality, scope, and contribution of academic production to the field of knowledge. Critical thinkers such as Tadajewski (2018) question research works that are planned strategically to fit the rankings. Although recognizing that rankings are necessary, Tadajewski (2018) notes that they reflect preferences and decisions of a certain group and not of the broader academic community.

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The evaluation of such studies' impact has followed a tradition that focuses on the diffusion of knowledge, including the number of publications in renowned journals and number of citations. This field of marketing research has made a great effort to bring clear theoretical contributions, a practice that is undoubtedly desirable and that must be stimulated continually. Nonetheless, the marketing discipline also allows for consideration of relevant and original contributions to the field and practice, originating, for example, in new theoretical lenses, adapted methods, new contexts, and generation of ideas. While marketing research requires organization, evaluation, and classification, it also needs intellectual flexibility and space to be creative, adaptable, and real. It is necessary to recognize the diverse nature of this discipline, which, since its origin, looks for similarities to challenge the differences.

Here, after almost 10 years, I find a space to return to the call made by Bradshaw and Brown (2008) who claimed the need for more collaboration among marketing researchers. The authors highlight the importance of collaborative cycles for bringing more creativity to marketing research. They also present an uncommon reflection about academic researchers' social dynamics, wherein collaboration is capable of generating high productivity of quality research works. Brazilian business schools may incentivize more co-creation in academic research, despite the fact that the institutional evaluation of the quality and the relevance of paper publishing seems to incentive competition among schools. We take little advantage of the potential of exchange and collaboration, not only of knowledge but also as a means for obtaining research resources, which are becoming increasingly scarce.

The diversity of knowledge developed through marketing research allows to find connections with corporations, a characteristic few areas enjoy. However, along with politicians, companies practices also go through a complex scrutiny process. Universities can become a valuable partner for them to face this challenging time when there are heightened concerns about ethical issues. This time is also marked by the creation of markets that transform rapidly, faster than marketing teaching and learning could ever imagine. As Farrell (2001) states, periods of intellectual turbulence produce conditions for the beginning of a creative cycle.

In which direction should our studies move toward? Have you asked yourself how your project may contribute to economics, sociology, psychology, anthropology, organizational studies, or any other discipline, along with marketing? A more paradigmatically pluralist attitude, in combination with a community that embraces difference, continues to be the way to promote dialogue inside and outside our discipline.

THE RED PILL AND DOORS TO BE OPENED

I finish this congenial reflection exercise on my experiences and thoughts using the fictional scenario of *The Matrix* film. The marketing of harmonic and integrated decisions that aim to fulfill consumers' needs and desires is very similar to the blue pill, which makes it possible to return to the world of dreams. Nonetheless, marketing cannot make use of the blue pill as an alternative anymore and must deal with the red pill, which breaks up the illusion. There is nothing wrong with dreaming, as illusions and desires bring pleasant feelings. Belk, Ger, and Askergaard (2003) outline the cycle of desire and highlight the importance of having desires, even when they are unachievable. On the other hand, for marketing professors and researchers, taking the red pill means confronting unpleasant feelings, such as dissatisfaction, anxiety, and frustration, which have triggered various types of anti-consumption movements and anti-consumerism activism.

Taking the red pill means having clarity about the mistakes and distress that comprise the field of knowledge, something that may end up unveiling obfuscated marketing benefits. Then, how should we pass marketing to the next generation? What genes should we pass on, and which ones should we leave behind along the way? As stated in the dialogue of *The Matrix* (1999), my intention was to present some doors I have opened. There are other doors, but all individuals are free to choose doors they want to open for the future of marketing teaching and research. Behind the doors I have chosen lies the human side of marketing.

Pirson and Lawrence (2009) note that a humanistic perspective considers that human nature is built by the learning and educational processes for which ethics is the main pillar. For the field of business, the authors propose a paradigm shift from economics to humanistics. They suggest that for this change to occur, we must be the starting point as individuals. How do we see ourselves as human beings? After reflecting upon this first question, we must become ready to start the second stage. Gopaldas (2015) suggests getting inspiration from consumption theories derived from anthropology to create a more humanistic future for marketing, because anthropology, a human-centered science, contemplates universal human topics. As an intriguing example, I recommend the "Special Issue: Consuming the Spiritual," published by the *Journal of Marketing Management*.

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BOOK RECOMMENDATION

Translated Version

HEALTHCARE SERVICES MANAGEMENT

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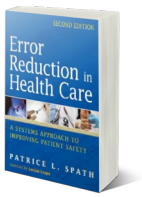
An increasingly relevant topic for practice and research management is Healthcare Processes and Services Management. With growing costs and questioned quality, the pressure for process review and waste reduction is increasing. This is combined with the need for quality improvement, in addition to improved patient safety. Important topics for managers include error reduction, the organization of health care operations, patient safety, and innovation and performance assessment for companies in the industry. The following books presented by Professor **Claudia Affonso Silva Araujo**, who is a professor at COPPEAD/UFRJ and at FGV EAESP, and coordinates the Center for Healthcare Studies – CESS/COPPEAD, provide a robust view of the subject.



ARQUITETURA E PLANEJAMENTO NA GESTÃO DA SAÚDE: Alinhando o conhecimento médico à administração do sistema de saúde
[ARCHITECTURE AND PLANNING IN HEALTHCARE MANAGEMENT: Aligning Medical Knowledge with Healthcare System Management]

Richard M. J. Bohmer. Porto Alegre, RS: Bookman, 2012. 274 p.

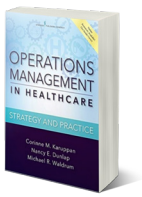
Being a physician and a manager, the author addresses three challenges of providing clinical services: the lack of scientific evidence; practices not based on available evidence; and medical errors due to omission or inappropriate action. In this context, the alignment of healthcare system components (professionals, organizations, knowledge, and care processes) is discussed so as to promote practices that provide good results for both patients and healthcare organizations.



ERROR REDUCTION IN HEALTH CARE: A systems approach to improving patient safety

Patrice L. Spath. San Francisco, USA: Jossey-Bass, 2011. 419 p.

This book focuses on reducing the number and impact of errors in healthcare services and discusses the best ways of measuring and interpreting data, proactively preventing and acting on adverse events, and promoting patient safety initiatives. In addition to discussing the causes of errors, the author presents theories and tools applied to patient safety, such as lean principles, information technology (IT), decision diagrams, and graphs and indicators.



OPERATIONS MANAGEMENT IN HEALTHCARE: Strategy and practice

Corinne M. Karuppan, Nancy E. Dunlap, & Michael R. Waldrum. New York, USA: Springer, 2016. 642 p.

This book discusses how healthcare organizations can become more competitive by managing their operations with the use of concepts and tools as drivers for improving quality, cost, flexibility and service delivery. Examples of topics discussed from a strategic perspective include lean and six sigma principles, capacity planning and demand forecasting, process analysis and design, supply chain management, and IT applications.



INOVAÇÃO NA GESTÃO DA SAÚDE: Soluções disruptivas para reduzir custos e aumentar qualidade
[HEALTHCARE MANAGEMENT INNOVATION: Disruptive solutions to reduce costs and increase quality]

Clayton M. Christensen, Jerome H. Grossman, & Jason Hwang. Porto Alegre, RS: Bookman, 2017. 422 p.

The authors apply principles of disruptive innovation to the healthcare industry to illustrate how cutting-edge technologies and other consumer-driven innovations can help healthcare organizations and health professionals improve care delivery, reduce costs, and make organizational processes more efficient. The book discusses medical practice, payment systems, chronic disease treatment, the pharmaceutical and medical supplies industry, and medical training.



PERFORMANCE MANAGEMENT IN HEALTHCARE: From Key Performance Indicators to Balanced Scorecard

Bryan P. Bergeron. Boca Raton, Florida, USA: CRC Press, 2017. 276 p.

Performance management is discussed as an improvement strategy in the areas of healthcare quality and safety, patient satisfaction, and the financial health of organizations in the industry. To this end, the book presents an extensive list of clinical and operational performance indicators and how they can be incorporated into the organizational structure and professional practice to measure the efficiency and effectiveness of resource use and results achieved.

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