



**DALHOUSIE**  
UNIVERSITY

FACULTY OF  
MANAGEMENT

# **Research in Review**

## **2024 Edition**









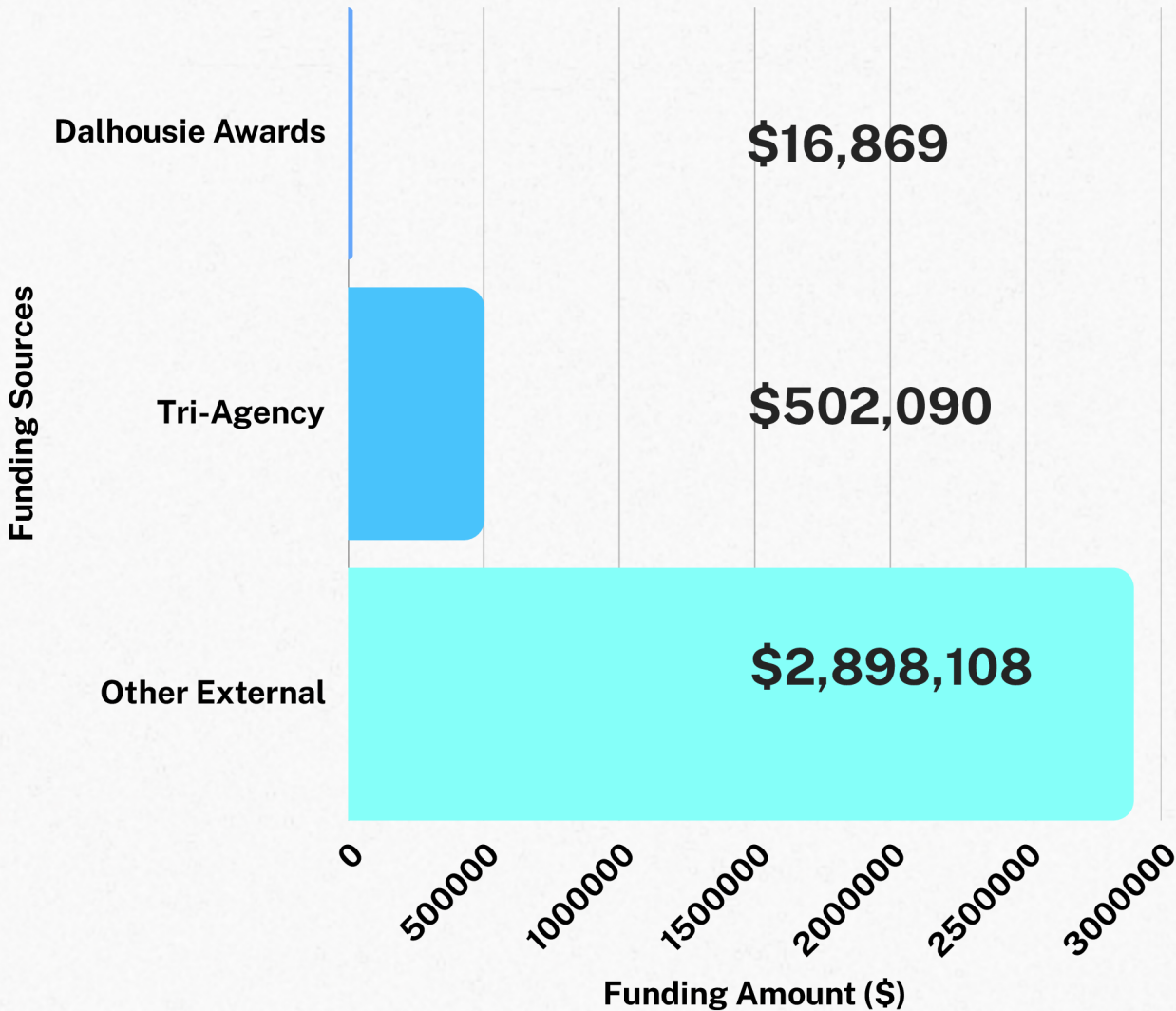
# 2024 Research at a Glance



52 research  
support staff



Total Funding  
for 2024 =  
\$3,417,067





# 2024 Research at a Glance

## 128 Publications

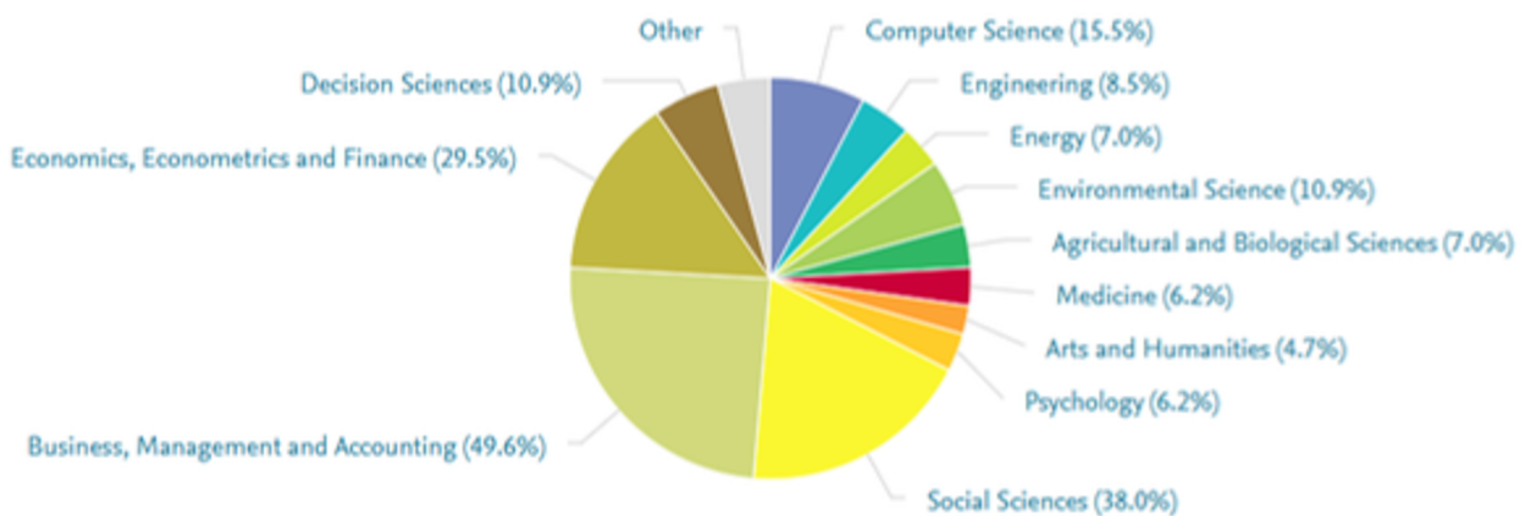
### Of those...

- 59.7% were written with an international collaborator

### And...

- 81 were published in the top journal quartile

## Subject Area Breakdown





# Beyond the Numbers: What is Research Impact?

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We asked our research community to define *research impact*, what it means to them, how they create impact in their work, and to highlight examples of impact in their colleagues' work. The responses were as diverse as our work. We confirmed that we are committed to rigorous, scholarly, thought-leadership, exemplified by things such student training, grant capture, and high-impact publications. Beyond scholarly impact, we care deeply about doing research that is socially impactful, with applications in community and organizations. In our words:

**“Research should advance our theoretical understanding of phenomena in a meaningful way”**

**“Impact is the ability to change the thoughts and behaviours of others”**

**“Relevance and applications of research addressing grand challenges in practice and in the real world”**

**“Research plays a crucial role in contributing to a more equitable and harmonious world”**

**“Impact means the work that I do serves a purpose other than my own”**

**“Research plays a crucial role in promoting diversity, equality, and inclusivity in society”**

**“Research that creates positive social change”**





# 2024 RESEARCH IMPACT AWARD ESTABLISHED SCHOLAR

## **Professor Dana Kabat-Farr**

Dr. Kabat-Farr's research strongly contributes to the scholarly and broader understanding of workplace incivility and harassment, as well as strategies that organizations can use to prevent such undesirable behaviours. Her research has not only been published in the most prestigious academic outlets, but also used in practice by organizations such as the Canadian Department of National Defence, and the U.S. Department of the Navy.



**Dana Kabat-Farr (centre) with Anika Cloutier (L) and  
Associate Dean Research W. Dominika Wranik (R)**



# 2024 RESEARCH IMPACT AWARD EMERGING SCHOLAR

## **Assistant Professor Stacy Allison-Cassin**

Dr. Allison-Cassin's research and applied work is aimed at creating structural change to overhaul terminology used in information management away from colonized and otherwise culturally inappropriate language. The potential impact of this work on organizations outside academia is evident through the active engagement of many external partners and their commitment to enacting change in the terminologies used by libraries, archives, and governments. She received strong financial support from both granting organizations and research partners.



**Stacy Allison-Cassin (L) with Associate Dean W. Dominika Wranik (C) and Sandra Toze (R)**



# RESEARCH CHAIRS

A Research Chair is a prestigious academic position awarded to distinguished scholars who lead impactful research programs within their field. These individuals aim to advance knowledge, mentor students to be future thought leaders and collaborate with colleagues, organizations, and communities.

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## Canada Research Chair: Indigenous Governance

### Dr. Sherry Pictou



Dr. Sherry Pictou is an intellectual leader working to elevate Indigenous worldviews and methodologies. Dr. Pictou is from L'sitkuk (meaning: water cuts through high rocks), or Bear River First Nation, Nova Scotia. The heart of Dr. Pictou's work is connecting with her people and organizations to bring forward transformative change through research. She is finding ways to incorporate cultural protocols into systems of Indigenous governance, resource extraction, and gender relations.

In her recent work with Indigenous fish harvesters and the Confederacy of Mainland Mi'kmaq, Dr Pictou developed recommendations aimed at improving fishers' health and wellbeing. These recommendations come from close work with Indigenous women fishers and consideration of challenges women face in a male-dominated sector.

Using workshops and interviews, Dr. Pictou's research is leading to immediate impact in the standing of women fishers within their sector: they have developed an award for women fishers and presented a Mi'kmaq women fishers panel at a conference. This ongoing research will continue to develop recommendations for policy and leadership.

Dr. Pictou is an intellectual and strategic leader focused on building networks and activities that lead to long-lasting policy impact. She is leading one of the transformative pathways of the larger Ārramāt project which connects biodiversity efforts with Indigenous health and wellbeing on a global scale. Her scholarly publications are influential. For instance, her recent publication on Indigenous community engagement requirements for academic journals shows a strong field-weighted citation, meaning this article is performing better than similar articles and is being cited by other researchers. Dr. Pictou also provides guidance to leaders in the Canadian funding landscape as a member of the Indigenous Advisory Circle for the Social Sciences and Humanities Research Council. This circle is moving forward reconciliation efforts and initiatives aimed at strengthening Indigenous research and Indigenous student training.



# Roy A. Jodrey Chair in Commerce & Society

## Dr. Catherine Loughlin

The Jodrey Chair prioritizes community-engaged research and collaboration across disciplines. The chair is dedicated to making academic scholarship more accessible and to mentoring highly qualified personnel.



Have you ever heard someone get yelled at by their coach? Or witnessed someone being intimidated by their boss? Research has shown that this type of behavior, particularly by those in leadership positions, has ramifications that spread through the organization. As Jodrey Chair, Dr. Catherine Loughlin faces this problem head-on by helping leaders develop the skills they need to build healthy and inclusive organizations. Using evidence-based workshops, Dr. Loughlin is studying how purposeful training can break patterns of abusive behaviors.

Changing leadership styles can be tricky, as what works in one context may not work in another.



In partnership with a Canadian sports organization and a medical training program, Dr. Loughlin is conducting her research across organizational contexts to find strategies and approaches that work for organizational-specific needs. Coaches and medical mentors are working with children and young professionals— young people at a critical stage of human and professional development. When leaders uphold healthy work and play environments, they can foster long-term, far-reaching impacts, fostering healthy and inclusive organizations for generations to come.



# **The Douglas C. Mackay Chair in Finance**

## **Dr. Greg Hebb**

The MacKay Chair in Finance was established in 1998 to advance teaching and research in finance at Dalhousie University. While its primary focus is on student development, the Chair also provides substantial support for both student and faculty research.

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As the largest provider of scholarships for the MSc in Business program, the MacKay Chair supports both finance and non-finance master's students. Additionally, it funds several key research databases utilized by scholars across the Faculty of Management.

In support of academic collaboration, the Chair has facilitated visits from distinguished researchers, including Dr. Michael King (University of Victoria) and Dr. Arman Eshraghi (Cardiff University), who have shared their expertise and latest research findings.

In terms of student engagement, the Chair plays a role in bringing financial innovators to Dalhousie University. Through lectures and discussion, students are provided the opportunity to see how the content they are learning in class is applied in real-life settings.

Furthermore, the MacKay Chair supports the MacKay Computer Lab, which provides access to critical research tools such as Bloomberg, Refinitiv Eikon, and RiskMetrics, enabling students and faculty to conduct high-quality financial analysis.



# **The William A. Black Chair**

## **Dr. Jing (Jenny) Chen**

The William A. Black Chair of Commerce was founded in 1921, the first year Dalhousie University graduated students from its new Bachelor of Commerce program. The Honorable William A. Black, co-founder of Pickford & Black, once the largest steamship enterprise in the Maritimes, established the chair. Chair holders are high prestige individuals with a distinguished record of scholarship.

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Recognized by fellow operations scholars as “The Customer Returns Professor,” Dr. Jing (Jenny) Chen is a global leader in the field of operations research. For five years running, Dr. Chen has appeared on the World’s Top 2% Scientists for her contributions to the field of Logistics and Transportation. Globally, she is one of the leading scholars in several topic clusters indexed on Scopus, including supply chain & sales and market entry & asymmetric information.



Dr. Chen’s global prominence speaks to the rigor of her research, which serves to both advance empirical knowledge in the realm of operations research, as well as provide practical applications to organizations and policy makers. For example, Dr. Chen has explored how customer return policies can mitigate fraudulent returns, while keeping sight of ethical considerations and customers’ retail experience. The insights from this research include practical advice for organizations developing return policies and have the potential to reduce costs and the environmental toll of unnecessary and fraudulent returns.



# F. C. Manning Chair in Economics and Business

## Dr. Sergio Carvalho

The Chair was established in 1960 by Sheldon and Marjorie Fountain in memory of Marjorie’s father, Fred C. Manning. From humble beginnings, Fred C. Manning created one of the largest and farthest-ranging business empires to come out of the Maritimes. United Service Corporation owned service stations, automobile agencies, bus and trucking companies, and suppliers of gasoline, oil, radio, wholesale automotive and electrical products.

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Dr. Sergio Carvalho is an accomplished scholar of consumer behavior research. His recent work has focused on brands—the unique identity that distinguishes a seller from its competitors. His work has examined how bias impacts decision making. His research has studied how negative brand associations impact people’s perceptions of moral character and may influence empathy. The insights from this research have broad practical implications, including guidance for organizations, relationships (both personal and professional), and brand management.

In 2024, Dr. Carvalho’s expertise has been sought after by media outlets such as the Canadian Press and CBC News, looking to better understand negative reactions to things such as tourism advertisements. News stories featuring his commentaries have a high re-publication rate appearing in Bloomberg, the Toronto Star, and Yahoo Finance Canada to name but a few.



# RESEARCH CENTRES

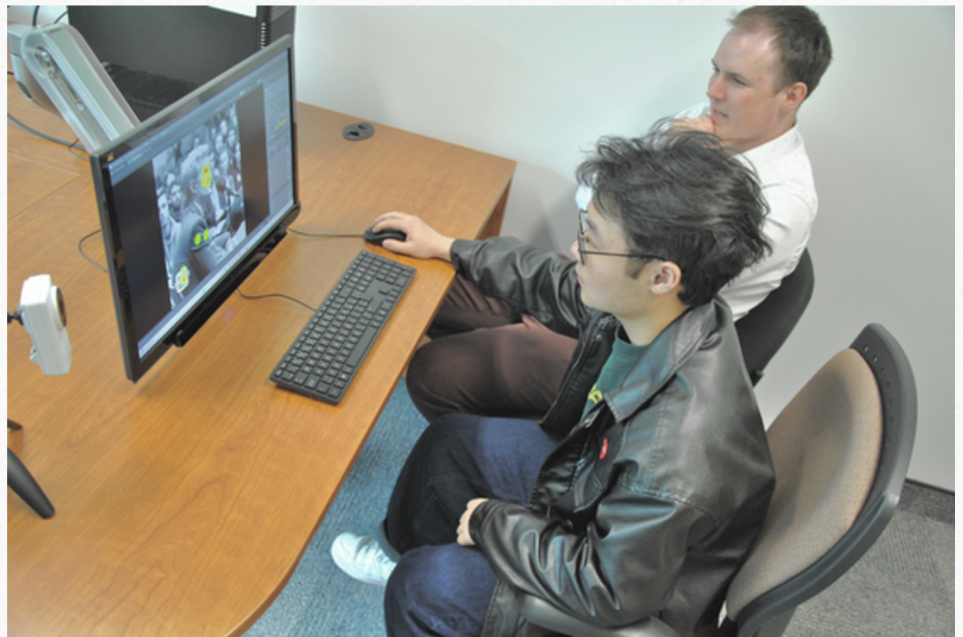
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## Cognition and Organizations Research Group

In 2024, the Cognition and Organizations Research Group launched a newly built space, located in the Kenneth C. Rowe Management building. CORG is a human observatory. It features mobile research equipment and modular furniture, that can be setup to mimic realistic work and study environments. Equipped with eye trackers and human tracking devices such as facial recognition, CORG is advancing research about how organizations and people use technology to advance workplace practices.

As a group of highly skilled people doing advanced, people-focused research, CORG can offer evidence-based reports to local companies and not-for-profits about specific technologies they may be using such as AI tools, the company website, or more general insights about how people use automation within organizations.

CORG is part of an international network of researchers, with ongoing collaborations in France and Germany. CORG is co-directed by Drs. Colin Conrad and Dana Kabat-Farr.

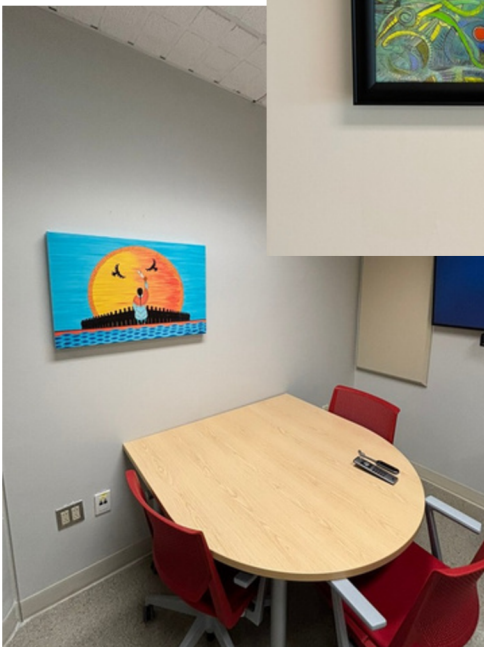




# Wit-lukutimk Wskitqamu

Wit-lukutimk Wskitqamu (WW), which in English means working together with mother earth, officially opened with the performance of ceremony on Indigenous day – June 21st, 2024. It is the first Indigenous research space in the Faculty of Management and was designed to accommodate Mi'kmaq practices: the WW is equipped with a ventilation system to facilitate smudging and has been furnished with mobile pieces that can be configured for a talking circle.

Importantly, the name of the centre emphasizes working with mother earth, bringing to bear a relational perspective on issues of land and water-based governance, Indigenous food and lifeways, and Indigenous knowledge. Directed by Dr. Sherry Pictou, the WW is rooted in meaningful engagement with Mi'kmaq communities and brings together global, interdisciplinary collaborations.

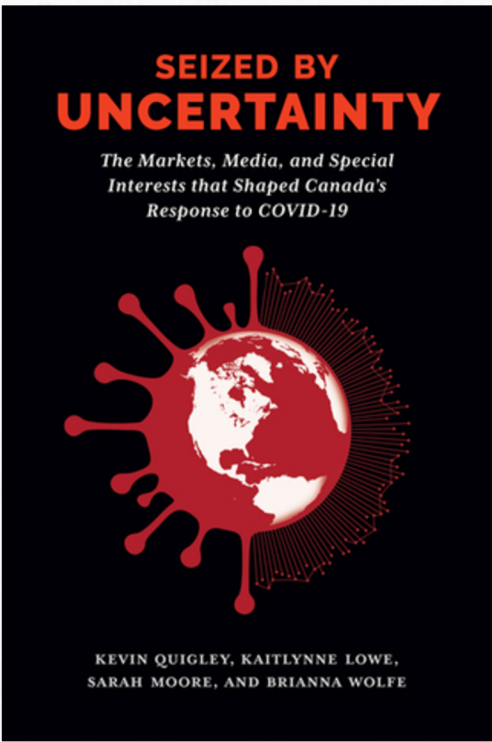




# MacEachen Institute for Public Policy and Governance

The MacEachen Institute’s main goal is to do research that informs the development of public policy, ensuring that the insights from their research are available to those who are making the decisions that bring forward meaningful change in our world.

In 2024, the MacEachen advanced research in accessible tourism with the goal of informing inclusive, impactful policy. Researchers worked with a broad range of stakeholders, including those with lived experience and people from marginalized communities using a data-collection technique called scenario planning roundtables. Drawing insights from these roundtables, MacEachen developed a set of briefing notes and made evidence-based recommendations for the tourism industry in Nova Scotia.



MacEachen Director, Dr. Kevin Quigley, along with his co-authors received the 2024 Donner Prize for their recent monograph on pandemic preparedness: Seized by Uncertainty: The Markets, Media, and Special Interests that Shaped Canada’s Response to COVID-19.

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## Quantitative Science Studies Lab

The Quantitative Science Studies (QSS) Lab aims to advance knowledge on the production, dissemination, and use of research. Directed by Dr. Philippe Mongeon, QSS includes a group of five junior researchers who together have obtained over \$250,000 in research funding, contracts, and scholarships in 2024 alone. Their work has focused on advancing open data, open science, and drawing out the linkages between academic writing and social media engagements. In the last year, QSS has published several research publications, presented at conferences, and developed a dataset.

QSS is a core member of Transforming Climate Action research program, a large-scale research collaboration that investigates the ocean’s role in climate change. As part of this larger project, QSS leads a work package that measures engagement with research related to the ocean–climate nexus. The goal of this work is to improve knowledge production and foster knowledge engagement, with the overarching goal of building a greater understanding of the ocean and climate change.



# Professional Motivations Research Lab

The Professional Motivations Research Lab is a diverse team of researchers from across Canada who together study public service motivation—a concept which explains what drives individuals to pursue careers in the public sector. Morale in Canada’s public service is declining due to shifting policies, uncertainty, and evolving workplace cultures. The research conducted at the PMRL helps public sector employers identify the factors that support or hinder professional motivation, guides human resource practices that can foster positive work environments, and can influence employment outcomes.

In 2024, PMRL secured funding for a new research project that will explore career preferences of the youngest segment of the working population—generation Z—engage. This ambitious study will develop a tri-country comparison of the respective employment sectors. In 2024, PMRL published a scoping review in Canada’s premier journal of public administration.

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## Agri-Food Analytics Lab

The Agri-Food Analytics Lab is a leading institution in food policy, sustainability, consumer behavior, and supply chain research. They provide data-driven insights and policy recommendations to address pressing issues in the agri-food sector. The research by AFAL aims to provide clear, actionable policy recommendations to address food insecurity, affordability, and sustainability challenges.

Research highlights from 2024 include several published studies on topics such as food waste, carbon pricing, agricultural practices, and consumer perceptions. The lab also developed two tools to support policy makers, industry leaders, and consumers. The Canadian Food Sentiment Index analyses Canadian’s perceptions toward food related issues such as affordability and consumer trust. The Food Price Report projects food prices, highlighting regional differences and economic drivers.

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## Center for Research in Sustainable Supply Chain Analytics

In December, CRSSCA hosted the 9<sup>th</sup> annual *Supply Chain and Logistics Management Workshop*, bringing together distinguished academics from around the world and industry leaders. Discussing the latest trends and cutting edge research was a venue for the cross-pollination of ideas. CRSSA supports the training and mentoring of students and the event concluded with a thesis competition and presentation of student awards.

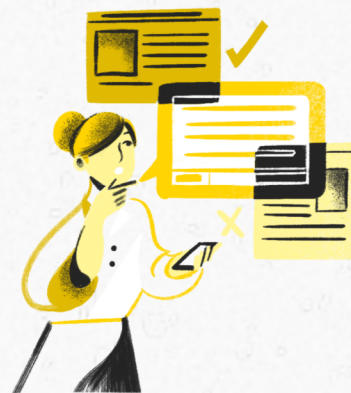
Research at CRSSCA is addressing pressing concerns, such as how to leverage technology to build robust and resilient supply chains, decarbonizing logistics, and supporting circular economies.



**DATA AND A.I.  
TRANSFORMATION  
ACROSS SECTORS**



**INDIGENOUS  
PARADIGMS FOR  
MANAGEMENT**



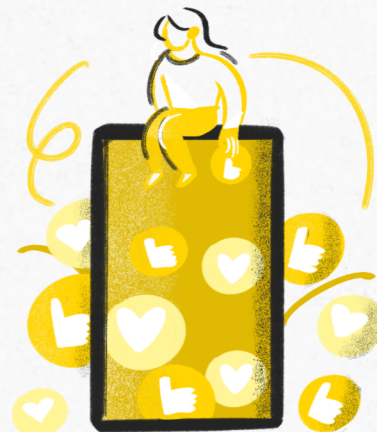
**LEADERSHIP AND  
CHANGE IN BUSINESS  
AND GOVERNMENT**



**ENGAGING WORK  
AND LEARNING  
ENVIRONMENTS**

# **CORE AREAS OF RESEARCH**

**SOCIALLY  
RESPONSIBLE  
MARKETS AND  
MARKETING**



**SYSTEMS AND  
POLICIES FOR  
SUSTAINABILITY**



## List of publications

The following list of publications is based on a search in Scopus for authors employed in the Faculty of Management. Only publications with a date of 2024 are included. Some relevant items may not appear in Scopus. Additions were made to this report if identified by individual researchers by March 25, 2023. Some publications are reported in Scopus as **2025** “articles in press” and may end up being assigned to a **2025** issue.

Management researchers’ names are in bold print. Publications authored by several researchers from Management appear only once under the author who appears first in the list of authors.

**Marie-Louise Fehun Aren**

**Aren M.-L.F.** (2024). Financial literacy: Its relevance in the education curriculum. In *Social Structure Adaptation to Covid-19: Impact on Humanity*, pp. 208 – 218. Routledge. DOI: [10.4324/9781032690278-28](https://doi.org/10.4324/9781032690278-28)

According to S&P’s Global Financial Literacy Survey, African countries have the worst financial literacy levels in the world. It is generally agreed that financially literate persons make the best possible financial and economic decisions, and are most likely to weather disturbances caused by a financial crisis. To this end, the adverse financial impacts of the COVID-19 pandemic exposed the need to improve financial literacy as a strategy to prepare African people, especially its youth, in navigating future global crises. Given that the Basic Educational Curriculum (BEC) of many countries - which includes primary and secondary level education - works as strengthening and foundational curriculum content on life skills and life orientation, the question becomes whether the BEC financially prepares citizens through financial literacy education. This chapter attempts to answer by studying the basic educational curriculum, mostly in Nigeria, as a main focal point to determine if the BEC rises to the occasion. Ultimately, the chapter provides recommendation on ways financial literacy education may be incorporated in the BEC and other platforms in financially preparing citizens for their financial future while simultaneously facilitating financial inclusion.

**Najah Attig**

**Attig N.** (2024). Relaxed Financial Constraints and Corporate Social Responsibility. *Journal of Business Ethics*, 189 (1), pp. 111 – 13. DOI: [10.1007/s10551-023-05353-9](https://doi.org/10.1007/s10551-023-05353-9)

This study fills an important gap in the literature by providing causal evidence of the impact of relaxing financial constraints on corporate social responsibility (CSR). To isolate this causal link, we examine the enactment of anti-recharacterization laws in some U.S. states, an exogenous shock that has strengthened creditor rights and eased financial constraints of the treated firms. Our difference-in-difference analysis suggests that relaxing financial constraints leads to higher CSR. This evidence is more pronounced in financially constrained firms, firms with more analyst



dispersion and increased volatility of cash flows. We also find that the most impacted firms are those with increased post-shock debt financing. In sum, our evidence suggests that easing access to external finance drives corporate goodness, in particular in firms that value external financing.

**Attig N., Rahaman M., Trabelsi S. (2024).** Creditors at the Gate: Effects of Selective Environmental Disclosure on the Cost of Debt. *Corporate Governance: An International Review*. DOI: [10.1111/corg.12599](https://doi.org/10.1111/corg.12599)

Research Question/Issue: What is the impact of selective environmental disclosure, also known as greenwashing, on firms' credit risk profiles? Can the superior information and monitoring abilities of private lenders serve as environmental governance mechanisms to promote the adoption of ESG best practices by firms?. Research Findings/Insights: Through detailed examination of private debt contracts and environmental disclosure practices, we reveal that private lenders impose financial penalties on firms with poor environmental records, manifesting as higher spreads and loan-related fees. Additionally, our analysis demonstrates that greenwashing, or misleading environmental transparency, results in increased debt financing costs for firms. Moreover, lenders may adopt lenient nonprice terms to mitigate the impact of higher loan costs on firms engaged in selective environmental disclosure. This intricate contract design allows lenders to extract appropriate returns without hindering firms' access to external financing. Theoretical/Academic Implications: Our findings underscore the significance of private creditors in enhancing environmental disclosure standards within the corporate sphere. Additionally, our evidence emphasizes the importance of integrating firms' environmental impact into theoretical and empirical credit risk models. Practitioner/Policy Implications: The intricate contract structures of bank loans can effectively address the informational risks associated with selective disclosure, without impeding firms' access to external financing. Hence, this financing mechanism holds the potential to enhance the ESG performance of firms.

**Zareie M., Attig N., El Ghouli S., Fooladi I. (2024).** Firm digital transformation and corporate performance: The moderating effect of organizational capital. *Finance Research Letters*, 61, art. no. 105032. DOI: [10.1016/j.frl.2024.105032](https://doi.org/10.1016/j.frl.2024.105032)

We use textual analysis to measure corporate digital transformation by the frequency of digital terms in the firm 10-K report. We then show that this digital transformation score (DGS) is associated with corporate value. Importantly, we show that organizational capital, the quality of corporate governance, information quality, and firm IPO age play non-negligible roles in shaping the value creation of corporate digital transformation. Our fresh evidence indicates that firms need to enhance their organizational capital, corporate governance, and firm information quality to benefit from their digital transformation efforts.

**Assoe K., Attig N., Sy O. (2024).** The battle of factors. *Global Finance Journal*, 62, art. no. 101004. DOI: [10.1016/j.gfj.2024.101004](https://doi.org/10.1016/j.gfj.2024.101004)



This study delves into the battle of factors in Canadian capital markets, employing spanning tests to evaluate 17 factors from ten multifactor models for 1991–2022. While the value factor (HML) proves redundant, its monthly updated counterpart excels. The size factor (SMB) is not improved by discounting mispriced stocks but gains potency after controlling for profitability and investment. Q-based and mispricing factors subsume the momentum factor (UMD). No single asset-pricing model emerges dominant, except in three instances. A six-factor model including market, size, monthly updated value, ROE, expected growth, and PEAD factors proves effective for asset pricing in Canadian markets.

FE Bordeleau

[Bordeleau F.-È. \(2024\). Data value creation during disruptive events. CEUR Workshop Proceedings, 3821](#)

In medium-sized firms, factors such as senior management involvement, organizational culture, and preferred organizational learning capabilities significantly influence data value creation. These factors are dynamic and evolve in response to adverse external conditions. This comparative study investigates two Canadian medium-sized enterprises in the electronic manufacturing sector that experienced significant supply chain disruptions during and post the COVID-19 pandemic. Initial interviews were conducted with executives in 2017, pre-pandemic, and follow-up interviews were carried out in 2023 to understand the influence of their chosen organizational learning approach on data value creation and resilience in their data-driven transformation. Findings suggest that exploitation organizational learning capabilities safeguard a firm's ability to sustain operational and strategic data value creation during disruptions. Conversely, exploration organizational learning capabilities facilitate an increase in strategic data value creation during the recovery phase but has less impact on operational data value creation. Therefore, while there is a connection between data capabilities and data value creation, this link may not be taken for granted during periods of significant supply chain disruptions. Incorporating organizational learning capabilities into the study of value creation trajectories over time enhances our understanding of this process.

Isabelle Caron

[Nzobonimpa S., Savard J.-F., Caron I., Lawarée J. \(2024\). Automating public policy: a comparative study of conversational artificial intelligence models and human expertise in crafting briefing notes. \*AI and Society\*. DOI: 10.1007/s00146-024-02103-x](#)

This paper investigates the application of artificial intelligence (AI) language models in writing policy briefing notes within the context of public administration by juxtaposing the technologies' performance against the traditional reliance on human expertise. Briefing notes are pivotal in informing decision-making processes in government contexts, which generally require high accuracy, clarity, and issue-relevance. Given the increasing integration of AI across various sectors, this study aims to evaluate the effectiveness and acceptability of AI-generated policy briefing notes. Using a structured evaluation-by-experts methodology, the research



scrutinizes and compares the output of three leading AI language models—OpenAI’s ChatGPT, Google’s Gemini, and Mistral’s Le Chat—across ten critical dimensions reflective of policy briefing notes quality. These dimensions encompass both structural and content-related aspects, ranging from linguistic precision to the depth and applicability of the generated information. The discussion is anchored in the technology acceptance model (TAM) theory and its extensions, which offer a theoretical framework for understanding the factors influencing the adoption and usefulness of technology in public administration. Our comparative analysis reveals that while AI models exhibit notable competencies in meeting some structural and linguistic benchmarks, they fail to address the nuances and depth required by policy experts for undertaking informed decision-making adequately. This discrepancy underscores the enduring value of human expertise in synthesizing complex information and navigating ethical considerations, even as AI enhances efficiency in certain aspects of the policy briefing note crafting process.

Savard J.-F., **Caron I.** (2024). Challenges of teaching public policy to practitioners: A case for andragogy. *Handbook of Teaching Public Policy*, pp. 376 - 389

[no abstract]

Sergio Carvalho

**Carvalho S.W.**, Mota M.O., Souza L.L.F., Gerhard F. (2024). Segmentation and Drivers of Beer Consumption in the Brazilian Market [Segmentação e direcionadores do consumo de cerveja no mercado brasileiro]. *Brazilian Business Review*, 21 (5), art. no. e20221385 DOI: 10.15728/bbr.2022.1385.en

The objectives of this study were to examine the importance of variables such as perceived quality, low price, social interaction, consumer knowledge, and packaging on purchase intention for beer in the Brazilian market; and to identify consumer groups with a distinct profile based on their behavior concerning these important variables. We found that perceived quality, low price, and social interaction were predictors of the willingness to buy beer. We also found that consumer product knowledge and packaging moderated the effects of perceived quality and low price on purchase intention. Our findings showed that the more product knowledge a consumer possesses, the less perceived quality would impact a beer brand’s purchase intention; and the greater the influence of packaging, the less impact a low price will have on the purchase intention of a beer brand. Our research also identified three distinct groups of beer consumers: Bohemians, Tasters, and NOBELs (NOt a BEer Lover).

Sylvain Charlebois

Taylor S., **Charlebois S.** (2024). Teaching dossier guidance for professional faculty: an evidence-based approach for demonstrating teaching effectiveness. *Frontiers in Education*, 9, art. no. 1284726. DOI: 10.3389/educ.2024.1284726



This research delves into the challenging paradox facing university faculty: they are often hired with minimal formal teacher training yet must exhibit teaching effectiveness when seeking promotion or tenure. This issue becomes particularly salient for educators with non-traditional, professional backgrounds who must demonstrate pedagogical competence despite lacking conventional academic training. This study examines teaching dossier guidelines employed by prominent universities that hire permanent teaching-focused business faculty who may have diverse, non-traditional backgrounds. For example, a Chartered Professional Accountant who trained in a public accounting firm and worked as a Chief Financial Officer of a public energy company or a sales executive who led the business development department of a large company likely do not possess the same academic training of a doctorate degree like other academics; however, such professional faculty may possess relevant experience and skills to teach accounting or marketing, respectively, to post-secondary students effectively. Our analysis identifies recurring recommendations for faculty to incorporate into their teaching dossiers, encompassing elements such as summaries of teaching responsibilities, documentation of course development or modification, creation of instructional materials, ongoing pedagogical improvement endeavors, outstanding teaching materials, articulation of teaching philosophies, and evidence of collegial collaboration and support. Our findings reveal a disconnect in understanding and recognizing the significance of teaching and teaching dossiers. In light of these observations, this paper outlines the limitations inherent in the current system. It suggests promising avenues for future research within this domain. We aim to foster a more equitable and supportive environment for all faculty members engaged in the complex task of academic teaching.

**Charlebois S., Thomas D., Sun N., Music J. (2024).** *Insights into Canadian consumer perceptions and behavior in the lobster industry: Implications for sustainability and economic development. Journal of Agriculture and Food Research*, 15, art. no. 100910. DOI: [10.1016/j.jafr.2023.100910](https://doi.org/10.1016/j.jafr.2023.100910)

Previous research within the lobster industry has often overlooked significant determinants that influence perceptions of lobster consumption. In response, this study aims to examine Canadian perceptions toward the Canadian lobster industry and to assess the impact of socio-demographics, consumer motivation, sustainability, economic diversity and equity, and traceability on the enjoyment of lobster consumption. An extensive cross-national survey was conducted, following a conceptual framework. Descriptive analysis and cumulative link models were deployed for data analysis. The outcomes indicate that Model 5 exhibits the best fit. Based on the findings from Models 2 and 5, key determinants influencing consumer preferences for enjoying lobster consumption include a preference for vegan diets, marital status, one's history of lobster purchases, the frequency of lobster consumption, the perceived importance of price, and support for the Canadian economy. In future research, natural language processing (NLP) techniques will be employed to gain deeper insights into consumer perceptions and behaviors within the Canadian lobster industry.



**Charlebois S., Rankin A., Taylor S., Music J. (2024).** Future food systems: exploring global production, processing, distribution, and consumption: Canada's food inflation story. *Future Food Systems: Exploring Global Production, Processing, Distribution and Consumption*, Academic Press. pp. 219 – 228. DOI: [10.1016/B978-0-443-15690-8.00017-5](https://doi.org/10.1016/B978-0-443-15690-8.00017-5)

This chapter examines the trends and causes of food inflation in Canada from 1970 to 2022. It explores historical episodes of inflation, particularly in the 1970s and 1980s, and their impact on food prices. Factors such as adverse weather events, geopolitical events, and supply chain disruptions are identified as significant contributors to rising food prices. The article also discusses the coping methods employed by consumers during periods of high food inflation, drawing parallels between the current situation and the austerity measures adopted by consumers in the 1980s. The impact of the COVID-19 pandemic on food prices and food affordability is analyzed, highlighting the disruptions in supply chains and labor shortages that have led to increased costs. The article further addresses the issue of competition and consolidation in the grocery sector and its potential impact on food prices. It concludes by examining the coping methods adopted by consumers in the current food economy, such as couponing, volume discounts, and increased reliance on food banks, and discusses the implications of rising food prices on food affordability for consumers.

**Charlebois S., Abebe G., Walker T.R., Keselj V., Music J., Pallavi Gone K., Tuffaha K., Vezeau J., Sarker B., Taylor S. (2024).** Implications of carbon Taxing policies on the food supply chain in Canada. *Transportation Research Interdisciplinary Perspectives*, 28, art. no. 101276. DOI: [10.1016/j.trip.2024.101276](https://doi.org/10.1016/j.trip.2024.101276)

This paper explores the implications of carbon-taxing policies on food supply chain affordability and competitiveness in Canada. Initiated with Alberta's 2007 carbon levy, Canada's approach to carbon taxation aims to mitigate greenhouse gas emissions while addressing the economic impacts on the food sector. With the federal carbon price set to rise to CAD \$170 per ton by 2030, the study investigates the potential for increased food prices and the challenges to food affordability as well as identify the current gaps in understanding the intricacies of Carbon Taxing Policies on the Food Supply Chain in Canada. Graphic analyses and forecasts were created using data from Statistics Canada and the U.S. Census Bureau. The main findings of the analyses reveal shifts in wholesale and industrial prices since the carbon tax's implementation. Findings suggest that carbon pricing may be affecting every level of the food supply chain, highlighting the need for further research to understand its full impact on food affordability and security.

**Charlebois S., Latif N., Ilahi I., Sarker B., Music J., Vezeau J. (2024).** Digital Traceability in Agri-Food Supply Chains: A Comparative Analysis of OECD Member Countries. *Foods*, 13 (7), art. no. 1075. DOI: [10.3390/foods13071075](https://doi.org/10.3390/foods13071075)

In an era marked by globalization and rapid technological advancements, the agri-food sector confronts both unprecedented challenges and opportunities. Among these, digital traceability



systems have emerged as pivotal in enhancing operational efficiencies, ensuring food safety, and promoting transparency throughout the supply chain. This study presents a comparative analysis of digital traceability adoption and its impact across member countries of the Organization for Economic Co-operation and Development (OECD). By utilizing a multidimensional analytical framework, this study investigates national regulations, legal frameworks, and key food commodities affected by digital traceability implementations. It systematically assesses the efficacy of these systems in meeting consumer transparency expectations, regulatory compliance, and the overarching goal of sustainable agri-food supply chains. Through case studies and empirical evidence, the paper elucidates the complex interplay between technological innovation and regulatory environments, offering insights into best practices and potential integration barriers. Ultimately, this comprehensive investigation contributes to the scholarly discourse on digital traceability, providing actionable recommendations for policymakers, industry stakeholders, and academia to navigate the complexities of modern agri-food systems.

**Music J., Sterling B., Charlebois S., Goedhart C. (2024).** Comparison of perceptions in Canada and USA regarding cannabis and edibles. *Journal of Cannabis Research*, 6 (1), art. no. 1. DOI: [10.1186/s42238-023-00213-9](https://doi.org/10.1186/s42238-023-00213-9)

Background: Canada took a national approach to recreational cannabis that resulted in official legalization on October 17, 2018. In the United States (US), the approach has been more piecemeal, with individual states passing their own laws regulating adult use. The objective of this study was to compare the two jurisdictions. Methods: Two exploratory, quantitative surveys were administered in May of 2021 in both Canada and the US. One thousand forty-seven Canadian and 1037 US residents (age 19 and older) were surveyed on approaches to and attendant regulations of consumer cannabis. Tests of significance were performed to analyze differences between two groups. Results: No statistically significant differences exist between the two countries in terms of cannabis legalization acceptance. Usage rates among adults was similar with 45% of Canadians and 42% of Americans confirming they consume cannabis. Respondents maintain that they intend to increase their usage, with edibles attracting a rising level of interest from consumers. Conclusions: Results suggest that public policy in both Canada and the USA needs to change to reflect rapidly evolving acceptance of cannabis products in North America to realize potential economic returns.

**Yang Y., Charlebois S., Music J. (2024).** Front-of-Package-Label-Style Health Logos on Menus—Do Canadian Consumers Really Care about Menu Health Logos? *Nutrients*, 16 (4), art. no. 545. DOI: [10.3390/nu16040545](https://doi.org/10.3390/nu16040545)

Public health policies have been widely utilized to improve population nutrition, such as the newly announced front-of-pack labels (FOPLs) that will be applied to Canadian prepackaged foods to help consumers make healthier selections. However, research on similar health logos in the food service sector has been limited. This study explores the potential application of FOPL-style health logos in the food service sector and its impact on consumer behaviors. A

survey was conducted among 1070 Canadians to assess their awareness, perception, and support for health logos on restaurant menus. The results indicate that while participants value healthy food options when dining out, taste, price, and convenience remain the primary factors influencing their choices. Most participants were unaware of existing FOPL policies and demonstrated mixed responses regarding the influence of similar health logos on their restaurant selection. However, a majority expressed a desire to see FOPL-style health logos on menus, and nutrient profile ratings and logos indicating nutrient limitations or encouragements were listed as preferred health logos. Notably, females indicated higher supportiveness for FOPL-style health logos on menus and individuals with food allergies exhibited higher agreement in the likelihood of eating at a restaurant displaying labels. Additionally, findings revealed that FOPL-style health logos alone may not significantly deter consumers from purchasing labelled menu items, especially if price is affected. Overall, this study highlights the need for further understanding consumer perceptions to effectively develop and implement FOPL initiatives in the food service sector.

**Charlebois S., Sun N., Paul K., Robinson I., Colombo S.M., Music J., Saxena S., Gone K.P., Vezeau J. (2024). Consumer Perceptions of the Canadian Salmon Sector and Their Associations with Behaviors: A Perspective from Indigenous Rights. *Foods*, 13 (9), art. no. 1309. DOI: [10.3390/foods13091309](https://doi.org/10.3390/foods13091309)**

Previous studies on consumer perceptions and behaviors of salmon have often neglected Indigenous rights within the Canadian salmon sector. This study innovatively addresses this gap by integrating Indigenous rights into the current analysis, alongside considerations of sustainability practices, socio-economic impacts, and consumer motivations. Our research objectives aim to fit three consumer perceptions—environmental sustainability, economic considerations, and Indigenous rights—and to evaluate their associations, alongside perception of a price increase, socio-demographics, and consumer motivation factors, with purchasing behaviors related to Canadian salmon products. Data for this study was collected from a nationwide online survey. Responses to Question 2 and Question 35 are encoded with numerical values ranging from 1 to 5, where larger numbers indicate stronger agreement with the statement. The inclusion of methodologies such as the Graded Response Model (GRM) and Cumulative Link Models (CLM) adds another innovative dimension to this study. Our findings demonstrate how consumer profiles are associated with these four perceptions and their underlying determinants. Furthermore, the study quantifies the influence of these four perceptions on each consumer purchase behavior. The implications of these findings extend to the realm of mathematical modeling in consumer decision-making processes, offering practical insights for businesses and marketers, and emphasizing the importance of implementing regulatory frameworks and initiatives that promote sustainability, safeguard Indigenous rights, and address socio-economic disparities.



**Charlebois S.** (2024). The ripple effects of carbon pricing on food supply chains and affordability: Editorial. *Trends in Food Science and Technology*, art. no. 104812. DOI: 10.1016/j.tifs.2024.104812

[no abstract]

**Charlebois S.,** Saxena S., Abebe G., Walker T., **Music J.,** Keselj V., Tuffaha K., Pallavi Gone K., Vezeau J., Sarker B., Taylor S. (2024). Implications of carbon pricing on food affordability and agri-food sector in Canada: A scoping review. *Transportation Research Interdisciplinary Perspectives*, 28, art. no. 101271. DOI: 10.1016/j.trip.2024.101271

This review delves into the effects of carbon pricing policies on food affordability and the performance of the agri-food sector, with a specific focus on Canada. Against the backdrop of the widespread adoption of carbon pricing as a crucial tool in reducing greenhouse gas (GHG) emissions, the discussion acknowledges potential economic repercussions, particularly for lower-income households. Findings reveal that the implementation of a mandated carbon tax across all provinces in Canada by 2019 led to reduced GHG emissions and an increase in food prices. In addition, this review positions Canada within the global context by examining actions taken by other countries and their impacts. Crucial research gaps are also identified, ultimately serving as a guide for future studies and policy formulation aimed at balancing the necessity of carbon tax implementation with considerations of food affordability.

**Charlebois S.,** Gone K.P., Saxena S., Colombo S., Sarker B. (2024). Assessing Consumer Implications of Reduced Salmon Supply and Environmental Impact in North America. *Sustainability (Switzerland)*, 16 (9), art. no. 3629. DOI: 10.3390/su16093629

This study investigates the impact of the Canadian government's decision to reduce the supply of farm-raised salmon in British Columbia (BC) on domestic prices, the level of imports, and the environment. By drawing upon data from diverse sources, this study employs the SARIMAX model to forecast future trends in salmon prices up to 2026. The forecasted results reveal that retail salmon prices will exhibit greater unpredictability and a predicted price increase of over CAD 30 per kilogram by 2026. In addition, increased consumption of imported salmon due to BC farm closure is expected to contribute to heightened carbon emissions and result in job losses within rural and indigenous communities. In short, BC salmon farm closure carries profound consequences for both the environment and market dynamics.

**Colombo S.,** Manríquez-Hernández J.A., **Music J., Charlebois S.** (2024). Canadians' Opinions and Preferences regarding Seafood, and the Factors That Contribute to Their Consumption and Purchasing Habits. *Sustainability (Switzerland)*, 16 (3), art. no. 1111. DOI: 10.3390/su16031111

Seafood provides rich sources of nutrients and generates relatively minimal environmental impacts; however, it tends to be underrepresented in discussions around food security. The objective of this study was to determine Canadians' preferences and opinions regarding seafood consumption. Of the 1000 Canadians that were surveyed, most consume seafood

regularly (87%). Apart from preference, nutrition was the primary reason for eating seafood (64%), and not affordability (21%). Younger Canadians, including Millennials (57%) and Gen Z (58%), placed a higher emphasis on preparation and cooking methods when purchasing seafood. Frozen seafood was the most popular selection for home consumption. Most Canadians prefer wild seafood; however, nearly as many had no preference for wild or farmed seafood. Most Canadians indicated that farmed seafood is a sustainable method of harvesting (49%), and many were willing to pay more for certified sustainable seafood. The environment and climate change are important factors when making food choices (54%), and most Canadians prefer to buy seafood that was harvested in Canada (74%). These results provide valuable insight into the attributes that Canadians value in their seafood choices. Sustainable, nutritious seafood with minimal environmental impacts should remain key areas of consideration to grow the seafood sector in Canada.

[Smyth S.J., Charlebois S. \(2024\). Agricultural chemical use and the rural-urban divide in Canada GM. \*Crops and Food\*, 15 \(1\), pp. 32 – 39. DOI: 10.1080/21645698.2024.2318876](#)

Innovation is of fundamental importance for improving food production, as well as sustainability food production. Since 1960, food production has benefited from innovations in plant breeding technologies, fertilizer, chemicals and equipment. These innovations have dramatically increased food production, while the amount of land used has minimally increased. However, future food production increases are jeopardized from widening knowledge gaps between rural food producers and large urban food consuming populations. Over time, that gap has fueled disinformation. The development of disinformation business models contributes to urban consumers receiving inaccurate information about the importance of inputs essential to food production, resulting in political pressures being applied that are targeted at reductions in the use of many food production inputs. The use of chemicals are a frequent target of disinformation campaigns. This article examines how the lack of government clarity about the safe use of chemicals contributes to a lack of public information.

[Juhasz M., Charlebois S., Music J. \(2024\). Perceived Value of Cultured Proteins as Novel Food in Canada: Generation Z Consumers in a Cross Generational Perspective. \*Journal of International Food and Agribusiness Marketing\*, 36 \(4\), pp. 686 – 713. DOI: 10.1080/08974438.2023.2190739](#)

A national Canadian survey, completed in October 2021 of 10,019 Canadians, provides detailed insight into the Canadian novel food marketplace. Questions gauged consumer perception, and openness to cultured proteins (CPs) across a range of considerations, juxtaposing Generation Z (those born between 1997 and 2005) with the broader Canadian average. Survey respondents, to a degree, are open to CPs commercialization, while mixed about the environmental and ethical value. CPs companies, regulators, policy-makers and investors need to be aware of the multi-dimensional aspects of consumer decision-making, backing claims with validated science. Overall value will need to be matched with taste and nutritional claims, built on trust, in Canada, and globally. Whether it is the social ethics of Generation Z that will become the strongest proponents of CPs (or aspirational consumers regardless of their age), market value



creation for the emergent sector can think of brand validation, and the public-private motivations in an adaptive science.

Jing (Jenny) Chen

Wang Y.-Y., Wang P., Wang J.-C., **Chen J.** (2024). Pricing and blockchain adoption for competitive sellers on an e-commerce platform with different contracts. *Computers and Industrial Engineering*, 194, art. no. 110352

We examine the impact of a blockchain technology (BCT) adoption strategy on the decisions and profits of branded companies and counterfeiters, and then discuss how BCT helps counterfeiters transform on a platform offering blockchain services and commission contracts. Our results show that BCT can make the branded seller better off when a platform has more brand-conscious consumers, despite the high adoption fee. Due to the free-riding effect, the counterfeiter's best choice is often not to adopt BCT. As the fraction of brand-unconscious consumers increases, even with low adoption fee, the branded seller will not use BCT, but the counterfeiter will adopt BCT to transform her business and become a legitimate seller by offering innovative products, which increases consumer surplus. As the counterfeit probability and blockchain added value increase, both sellers proactively adopt BCT to disclose product authenticity, which may worsen the platform and social welfare. Importantly, there is a win–win outcome for sellers, platforms and consumers when at least one seller adopts BCT, depending on the interaction among the abovementioned factors. Compared with the proportional-fee contract, the fixed-fee contract improves the cost affordability of both sellers. In the context of different consumer types on platforms, our findings offer guidelines for branded companies to solve the authenticity problem of products and for counterfeiters to transform their businesses.

Amjadian A., O'Neil R., Khatab A., **Chen J.**, Venkatadri U., Diallo C. (2024). Optimising resource-constrained fleet selective maintenance with asynchronous maintenance breaks. *International Journal of Production Research*. DOI: 10.1080/00207543.2024.2403114

This paper offers a novel and significant extension of the Fleet Selective Maintenance Problem (FSMP) by considering asynchronous maintenance breaks and resource-constrained maintenance planning. This constitutes a significant shift from the conventional focus on synchronous breaks for the FSMP formulated to plan maintenance for fleets of mission-critical systems. This paper establishes a theoretical link between the Selective Maintenance Problem (SMP) and the Resource Constrained Project Scheduling Problem (RCPSP). The proposed FSMP formulation for asynchronous breaks is more general and versatile in adapting to a broad spectrum of operational constraints and resource scarcities. Numerical experiments are conducted that highlights the trade-offs between the timing and quality levels of maintenance activities and the consumption of resources that maintenance planners can make to obtain the best system performance for the budget and maintenance windows available.

Li W., Tian R., **Chen J.** (2024). Original equipment manufacturer with remanufacturing: Outsourcing strategy and organizational structure. *Transportation Research Part E: Logistics and Transportation Review*, 187, art. no. 103575. DOI: 10.1016/j.tre.2024.103575

We consider an original equipment manufacturer (OEM) with two divisions: one manufacturing and selling new products, and the other remanufacturing used products for sale. The OEM can choose between centralizing or decentralizing its manufacturing and remanufacturing divisions. The OEM's product contains a key component that cannot be reused in the remanufactured product. Each unit of the new/remanufactured product requires one unit of this new component. The OEM may either produce this component in house or outsource its production to a supplier. By developing game-theoretic models, we investigate the impact of the OEM's internal organizational structure on its outsourcing decision, and the impact of the OEM's outsourcing strategy on its choice of internal organizational structure. For a given internal organizational structure, we show that the levels of the supplier's cost advantage and the cost saving from remanufacturing are the primary drivers in the OEM's outsourcing decision. Moreover, the OEM's internal organizational structure has significant implications for its choice of outsourcing strategy. Specifically, when the cost saving from remanufacturing is moderately low or sufficiently high, the decentralized OEM is more likely to choose outsourcing, while the centralized OEM is more likely to outsource when the cost saving from remanufacturing is moderate. For a given outsourcing strategy, we show that the OEM's choice of internal organizational structure is significantly influenced by its outsourcing strategy. While the insourcing OEM always prefers a centralized structure, the outsourcing OEM may strategically decentralize its internal organizational structure, depending on the level of cost saving from remanufacturing and the degree of consumer acceptance of the remanufactured product.

Guo X., **Chen J.**, Wu J., Zhang T., Zhang H. (2024). Returns policy, in-store service, and contract strategies in the presence of customer returns. *Transportation Research Part E: Logistics and Transportation Review*, 186, art. no. 103520. DOI: 10.1016/j.tre.2024.103520

Returns policies and in-store retail service are widely used strategies for managing customer returns. In this paper, we consider a supply chain with a manufacturer and a retailer, in which the retailer should decide its returns policy strategy by choosing between a no-refund policy (NR) or a money-back guarantee policy (MBG), as well as deciding whether to provide in-store service. We identify the retailer's optimal returns policy and in-store service strategies. We find that while the net salvage value of a returned product is a key factor influencing the retailer's decision on its optimal returns policy, the retailer's in-store service strategy is dependent on its chosen returns strategy. We show that offering an MBG policy can expand the market coverage of the supply chain, while providing in-store service does not yield the same effect. The retailer's optimal returns policy and in-store service benefit the manufacturer. However, there are cases where providing in-store service is not optimal for the retailer, but the manufacturer can benefit from it. In such circumstances, the manufacturer can use a contract to incentivize the retailer to provide in-store service. We also discuss extensions of the model to examine the



impact of a non-zero residual value of the unsatisfactory product under an NR policy on the retailer's decisions, and where the retailer endogenously determines its service level through numerical exploration.

Wang F., **Chen J.**, Yang H., Sun F. (2024). Information and selling mode strategies in a supply chain with an outsourced private label product. *International Transactions in Operational Research*, 31 (5), pp. 3280 – 3317. DOI: [10.1111/itor.13448](https://doi.org/10.1111/itor.13448)

This paper examines the interplay between the information strategy of an e-commerce platform and the selling mode strategy of a manufacturer within a co-opetitive supply chain, as well as the identification of the optimal supply chain strategy. We develop a supply chain model where a platform outsources production of its private label product to a manufacturer, who also sells its national brand product through the platform. The platform must decide whether to acquire consumer quality preference information at a cost and share it with the manufacturer, while the manufacturer needs to choose between the reselling mode or the agency selling mode for its national brand product. The two driving effects (competition-intensification effect and mode differentiation effect) are identified. Our findings show that the platform will acquire and share information when the acquisition cost is sufficiently low, leading to the “competition-intensification effect.” Additionally, the manufacturer prefers the agency selling mode when cost-quality efficiency is low, and the reselling mode otherwise, driven by the “mode differentiation effect.” In cases where information sharing is absent, the manufacturer is more likely to choose the agency selling mode. Interestingly, when the cost-quality efficiency of the manufacturer's product is moderate and the information acquisition cost is low, the “competition-intensification effect” and the “mode differentiation effect” offset each other, resulting in the expansion of the region where the manufacturer chooses the reselling mode due to the platform's information-sharing strategy. As a result, this enhances a cooperative relationship between the manufacturer and the platform. We also derive the optimal supply chain strategy, providing insights into both the manufacturer's selling mode and the platform's information strategies in online retailing.

Yang H., Huang Y., **Chen J.**, Chen B., Shen Y. (2024). Subsidy strategy for reserving flexible capacity of emergency supply production. *International Transactions in Operational Research*, 31 (1), pp. 316 – 345. DOI: [10.1111/itor.13324](https://doi.org/10.1111/itor.13324)

This paper investigates a government's subsidy strategy for motivating a manufacturer to set up a flexible production line for emergency supplies. Four subsidy strategies are proposed to ensure a desired service level in case of an emergency: zero subsidy, a fixed subsidy, a marginal subsidy, and a hybrid subsidy. We develop a game theoretical model to examine how the government can induce a manufacturer to set up a flexible production line that can respond promptly to an emergency, based on the manufacturer's cost structure (fixed and marginal costs). We find that when the marginal profit of an emergency product is higher than that of the manufacturer's regular product, a fixed (marginal) subsidy is the dominant strategy if the manufacturer's fixed (marginal) cost is high, while a hybrid subsidy strategy is dominant if both

costs are high. When the marginal profit of an emergency product is lower than that of the manufacturer's regular product, neither a fixed subsidy nor a zero subsidy will be the dominant strategy. We also find that a marginal subsidy can ensure the effectiveness of the strategy, while a fixed subsidy helps improve strategy efficiency. We use government subsidy strategies implemented for Chinese COVID-19 emergency supplies as examples to demonstrate the effectiveness and efficiency of the subsidy strategies under the proposed framework. We also extend the discussion by considering the manufacturer's social consciousness.

Chen W., Zhang Y., **Chen J.**, Ma Y. (2024). Renewable Energy Investments of Electricity Enterprise with Carbon Quota Financing. *IEEE Transactions on Engineering Management*, 71, pp. 8166 – 8191. DOI: [10.1109/TEM.2024.3391171](https://doi.org/10.1109/TEM.2024.3391171)

This article examines two commonly used financial strategies of an electricity enterprise (EP): the carbon quota sale financing strategy (Strategy S), and the carbon quota pledge financing strategy (Strategy P), while considering a capital constraint. The findings show that Strategy S yields higher renewable energy investment and demand, as well as lower total carbon emissions, compared to Strategy P when the total carbon quota exceeds a certain threshold or when the EP does not have the financial constraint under either strategy. Conversely, when the EP faces the financial constraint under both strategies, the opposite holds true. The study also reveals that an increase in the renewable energy preference degree does not always lead to beneficial outcomes in terms of renewable energy investments and carbon reductions when the EP faces the financial constraint. Under this condition, electricity prices, demands, and total carbon emissions increase, while renewable energy investments remain unaffected by changes in the renewable energy preference degree. In addition, for a lower renewable energy preference degree, combining Strategy S (or Strategy P) with a higher (or lower) total carbon quota leads to lower electricity price and greater renewable energy investment. However, for a higher renewable energy preference degree, neither strategy results in lower electricity price nor larger renewable energy investment simultaneously. Moreover, whether the EP is constrained by financing or not, an increase in the cost coefficient of renewable energy investment adversely affects renewable energy investments, demands, total carbon emissions, and the EP's profits. However, when the EP faces the financing constraint, the initial carbon trading price proves beneficial in increasing both the renewable energy investments and demands, as well as reducing total carbon emissions.

Anika Cloutier

**Cloutier A.E.**, (2024). Barling J. Adolescent dating violence and leader role occupancy. *Journal of Occupational and Organizational Psychology*. DOI: [10.1111/joop.12558](https://doi.org/10.1111/joop.12558)

Who becomes a leader is of considerable importance to employees, organizations and society. Recently, researchers have considered whether early life events outside of the workplace affect who occupies leadership roles within organizations. Informed by the lifespan approach to leadership, and the work–home resources model, we investigate whether violence in



adolescent dating relationships is associated with leader role occupancy in adulthood. We hypothesize that experiencing psychological aggression and physical violence indirectly lowers the likelihood of occupying a leadership role through depressive symptoms. Moreover, we hypothesize that the indirect effects will be weaker when parent–adolescent relationship quality is higher, when adolescents come from higher household incomes, and stronger for women. Drawing on four waves of ADD Health, results showed that experiencing early psychological aggression in dating relationships increased depressive symptoms, hindering leader role occupancy; however, this effect was buffered by income, and stronger for women. Experiencing physical violence exerted indirect negative effects on leader role occupancy via depressive symptoms, regardless of parent–adolescent relationship quality, income or gender. There were no direct effects of aggression or violence on leader role occupancy. Our findings suggest that early personal relationships can impact young adult's mental health, which in turn can influence leadership outcomes into adulthood.

[Brykman K.M., Cloutier A., Carleton E.L., Samosh D. \(2024\). Too Depressed and Anxious to Speak Up: The Relationships Between Weekly Fluctuations in Mental Health and Silence at Work. \*Journal of Occupational Health Psychology\*, 29 \(3\), pp. 174 – 187. DOI: 10.1037/ocp0000375](#)

While it is widely acknowledged that some employees are more prone to silence than others, emerging research suggests that silence is much more dynamic than previously indicated, as even the most vocal employee will withhold input in some situations. However, given scant empirical attention to intraindividual fluctuations in silence, several important questions remain regarding its etiological antecedents, the mechanisms underlying such effects, and potential factors mitigating them. We respond by integrating the silence and mental health literature to consider how fluctuations in employees' experiences of depression and anxiety relate to fluctuations in silence via distinct silence motives. Specifically, we propose that employees are likely to engage in silence while experiencing episodes of depression because depressive symptomology shifts perceptions toward voice being pointless (i.e., ineffectual silence motive). Likewise, we propose that employees are likely to engage in silence while experiencing flare-ups of anxiety because anxious symptomology shifts perceptions toward voice being dangerous (i.e., defensive silence motive). Finally, we argue that voice endorsement attenuates these relationships by interrupting the link between silence motives and behaviors, such that employees experiencing heightened ineffectual and defensive silence motives are less likely to remain silent during weeks in which they experience high voice endorsement. We find support for these predictions via an experience sampling methodology study conducted with 136 employees across 4 weeks. We discuss how these results enhance theoretical clarity on the dynamic links between mental health and silence and offer insights into how organizations can counteract intrapersonal variations in silence.

Colin Conrad

**Conrad C., Moylan R., Diaz G.O. (2024).** University life has gone digital: influences of institutional mobile social network use during the COVID-19 emergency. *Library Hi Tech*, 42 (2), pp. 696 – 710. DOI: 10.1108/LHT-12-2021-0458

**Purpose:** Many universities implemented institutional social networking apps as an alternative to in-person social experiences during the COVID-19 pandemic. Therefore, this study aims to explore previously identified factors that influenced intentions to form collective actions, also known as we-intentions, on such social networking apps and their influence on student satisfaction with the app artifact. **Design/methodology/approach:** Students from across a large university were invited to participate in a survey. Responses from 915 students who reported using the app were analyzed using a maximum likelihood covariance-based structural equation model. Analysis was conducted using the R programming language's psych, lavaan, and semTools packages. **Findings:** The authors found that we-intentions are positively associated with recent app use and with student satisfaction with the app. Group norms were found to significantly influence the formation of we-intentions, while social identity is positively associated with both we-intentions and satisfaction. **Originality/value:** The paper provides evidence that past research generalizes to the context of university mobile social networks and identifies a relationship between we-intentions and satisfaction in this context. It also provides practical insight into factors that influence we-intentions, and subsequently students' online education experience, in the context of a university's institutional mobile social network.

**Conrad, C., and Heggie, C. (2024).** Legal and ethical challenges raised by advances in brain-computer interface technology. *Canadian Journal of Law and Technology*, 21(2).

Brain-computer interfaces (BCI) consist of hardware and software that allow humans to control computers with their brain signals alone. Though these technologies are not new, existing approaches to BCI are either very limited in their capabilities or require highly invasive surgery. However, BCI has recently received increased attention due to advances that enable enhanced usability with less invasive approaches. Such advances could radically change the acceptance of the technology and BCI might become commonplace in the coming decades. In this article, we provide a technology scholar's perspective on how these recent advances in BCI present new legal and ethical considerations. We argue that there are three ways that these advances challenge Canada's existing privacy and data laws. First, the complexity of next-generation BCI approaches may present challenges for Canada's regime for informed consent which may not be adequately addressed by Canada's present legislative landscape. Second, the sensitivity of the personal information collected by advanced BCI technologies could present challenges for Canada's privacy torts, which are built on the assumption of harm caused by intrusion upon seclusion. Finally, the capabilities provided by these technologies present a moral hazard akin to medical enhancements, which warrants consideration by Canada's meritocratic institutions. Taken together, this article aims to raise awareness and launch discussion about the role that these technologies can play in society as they become more commonly used.



Peggy Cunningham

Schaefer S.D., **Cunningham P.**, Diehl S., Terlutter R. (2024). Employees' positive perceptions of corporate social responsibility create beneficial outcomes for firms and their employees: Organizational pride as a mediator. *Corporate Social Responsibility and Environmental Management*, 31 (3), pp. 2574 – 2587. DOI: 10.1002/csr.2699

We studied employees' responses to the Corporate Social Responsibility (CSR) program implemented within the Canadian headquarters of a global consumer goods company. Our study is timely since recent studies indicate that employees place more importance on CSR activities when evaluating current or prospective employers. A novel theoretical contribution of our study is that we combine social identity theory and the theory of appraisal of emotions to better understand employee responses. We developed and tested a model that indicates that employees' evaluation and perceptions of the authenticity of their company's CSR efforts can create both firm-beneficial (loyalty, trust in management, positive word-of-mouth) and employee-beneficial outcomes (job satisfaction, emotional well-being). The impact of CSR does not result directly—it is mediated by organizational pride. We also collected qualitative data that suggested that the company's CSR initiatives can contribute to employees' sense of meaning of their work. We discuss implications for researchers and managers, as well as limitations of the study.

Jansen L., **Cunningham P.**, Diehl S., Terlutter R. (2024). Corporate social responsibility in controversial industries: A literature review and research agenda. *Corporate Social Responsibility and Environmental Management*, 31 (5), pp. 4398 – 4427. DOI: 10.1002/csr.2813

This study reviews the extant literature about corporate social responsibility (CSR) activities of companies operating in controversial industries. We analyze 88 articles guided by the overall question of how such companies integrate CSR into their business practices, which topics are addressed, and what the effects of these engagements are on various stakeholders. We use Maon et al.'s (2009) integrative framework to structure our analysis and develop a research agenda. Our review suggests that controversial companies' motivations are not altruistic, but largely market-based and reactive. No studies indicated that firm mission or values underpinned the motivation for undertaking CSR programs. We also found that the perspective of employees was underrepresented. Moreover, a large number of the articles (44.3%) in our dataset dealt with communication-related topics, neglecting many other areas of the CSR process.

Léo-Paul Dana

Simba A., Tajeddin M., Farashahi M., **Dana L.-P.**, Maleki A. (2024). Internationalising high-tech SMEs: Advancing a new perspective of open innovation. *Technological Forecasting and Social Change*, 200, art. no. 123145. DOI: 10.1016/j.techfore.2023.123145

Choosing a foreign market entry strategy is known to be essential for firm internationalisation yet there is very little focus on the role, purpose, and value of open innovation for internationalising high-tech SMEs. A review of the international business, international entrepreneurship and international marketing literature combined with a bibliometric mapping of 2501 articles on firm internationalisation, suggests that research does not readily associate open innovation and the internationalisation of high-tech SMEs. This is regardless of open innovation's activities that can span over a firm's immediate geographical space. Thus, this study introduces new theoretical explanations and a midrange open innovation theory to advance open innovation as an alternative foreign market entry strategy especially for internationalising high-tech SMEs. This has theoretical and practical implications for academics, international business managers, and practitioners because it introduces an alternative internationalisation strategy for SMEs. © 2023 The Author(s)

Keen C., Sanchez-Famoso V., **Dana L.-P.** (2024). Moderating effect of social capital on the dynamics between entrepreneurial orientation and internationalization of Spanish family owned businesses. *Journal of Management and Organization*, 30 (1), pp. 59 – 77. DOI: [10.1017/jmo.2022.42](https://doi.org/10.1017/jmo.2022.42)

This paper addresses an important knowledge gap regarding the internationalization of family businesses. To understand the specific factors that influence the internationalization of these firms, this paper investigates the role and articulation of entrepreneurial orientation (EO) and family social capital (FSC) on internationalization performance. Our findings reveal that the more entrepreneurial the family business, the higher the likelihood of identifying and exploiting business opportunities in foreign markets. The moderating effect that FSC can have on the dynamics between EO and internationalization indicates that this relational family specific asset facilitates organizational stability and performance enhancement.

Akram H.W., Ahmad A., **Dana L.-P.**, Khan A., Akhtar S. (2024). Do Trade Agreements Enhance Bilateral Trade? Focus on India and Sri Lanka. *Sustainability (Switzerland)*, 16 (2), art. no. 582. DOI: [10.3390/su16020582](https://doi.org/10.3390/su16020582)

This article examines bilateral trade relations between the two important countries of South Asia, India and Sri Lanka, in light of the South Asian Free Trade Area (SAFTA) and the India-Sri Lanka Free Trade Agreement (ISFTA). The analysis period spans the years 1995 to 2020. The primary analysis found that bilateral trade has been sluggish and that the SAFTA and ISFTA agreements have had no discernible effect on these two countries' bilateral trade performance. The causes of lackluster trade performance were investigated using the "revealed comparative advantage" and the "trade complementarity" indices. Clear evidence was found demonstrating that the reason for the bilateral trade's consistent lackluster performance is due to both countries' lack of revealed comparative advantage in the majority of product groups, followed by export similarity in the product groups where they do have a comparative advantage. The findings also confirm the suspicion of many observers that they are competitors rather than



natural trading partners. Although any substantial future increase in their bilateral trade is improbable and fanciful, the paper reflects on methods of strengthening bilateral trade.

**Dana L.-P., Chhabra M., Agarwal M. (2024).** A two-decade history of women's entrepreneurship research trajectories in developing economies context: perspectives from India. *Journal of Management History*, 30 (1), pp. 6 – 28. DOI: 10.1108/JMH-11-2022-0064

**Purpose:** This paper seeks to add a historical perspective to the contemporary debate concerning women's entrepreneurship in India. This study aims to explore the quantitative and qualitative research map of the research field of women's entrepreneurship. Through this exploration, the authors aim to portray the historical and contemporary factors related to women's entrepreneurship development in India, the problems and the opportunities. Future research opportunities are also identified based on the keyword analysis.

**Design/methodology/approach:** The study uses a systematic literature review to analyze the historical and theoretical perspectives of women's entrepreneurship in India. The bibliometric analysis portrays the publication landscape, including the most popular journals, authors and countries, citation analysis and keyword analysis. The content analysis reveals the thematic clusters of the research field.

**Findings:** The content analysis of the management literature on women's entrepreneurship reveals four primary clusters from the research: contextual embeddedness in women's entrepreneurship, reasons for starting a business, microfinance interventions and empowerment of women entrepreneurs and marginalization dynamics for women entrepreneurs in India's informal sector. The study also presents implications for policymakers and a women entrepreneurs' development framework. **Originality/value:** To the best of the author's knowledge, this study is the first to comprehensively analyze the management literature on women's entrepreneurship in India from a historical perspective. The study combines bibliometric mapping and content analysis for a holistic presentation of the research field of women's entrepreneurship in India and future research opportunities.

**Dana L.-P., Crocco E., Culasso F., Giacosa E. (2024).** Mapping the field of digital entrepreneurship: a topic modeling approach. *International Entrepreneurship and Management Journal*, 20 (2), pp. 1011 – 1045. DOI: 10.1007/s11365-023-00926-6

In the evolving landscape of entrepreneurship, digital technologies have ushered in new possibilities, attracting considerable academic attention. Despite the burgeoning research in Digital Entrepreneurship, the field remains fragmented, warranting a synthesized overview and structured research agenda. Consistently with the above, the paper presents a quantitative mapping of Digital Entrepreneurship through a bibliometric analysis of its publications. The research aims to address the need for a comprehensive, bibliometric overview of the topic, which has been echoed in recently published papers. In order to achieve this goal, we collected data from the Web of Science database, a common and scientifically sound choice in entrepreneurship research. The data were analyzed by applying Latent Dirichlet Allocation and topic modeling, thus providing a unique approach to bibliometric mapping. Topic modeling allows for the processing and analysis of significant amounts of scientific data, thus

making it an ideal tool for bibliometric research. We find the field of Digital Entrepreneurship to be rather lively and in rapid development, with several publication outlets, affiliations, and countries contributing to it. We found four main topics to be extracted: the implications of Digital Entrepreneurship for innovation, Digital Entrepreneurship as an enabler for empowerment, the transformation of business models through digitalization, and the surge of digital platforms as entrepreneurial ecosystems. Additionally, we have provided a comprehensive overview of the theoretical lenses used amid the sample and a structured research agenda built upon extant gaps. From a theoretical perspective, the article serves as a starting point for future research on the topic and a comprehensive analysis of its present and past. From a practical perspective, the study is of interest to digital entrepreneurs willing to learn more about the opportunities and challenges provided by the digital landscape.

Chatterjee S., Chaudhuri R., Vrontis D., **Dana L.-P.**, Kabbara D. (2024). Developing resilience of MNEs: From global value chain (GVC) capability and performance perspectives. *Journal of Business Research*, 172, art. no. 114447. DOI: [10.1016/j.jbusres.2023.114447](https://doi.org/10.1016/j.jbusres.2023.114447)

External shocks create various risks for enterprises. Multinational enterprises (MNEs) work to develop resilience and improve their global risk management capability. The COVID-19 pandemic has compelled MNEs to improve their global value chain (GVC) capability to enhance their global risk management and operational performance, which could eventually impact their overall performance. Developing GVC capability is a challenge for MNEs. This study aims to examine the influence of global risk management capability on MNEs' GVC capability to become more resilient to withstand such crises and further enhance their performance. Building on the resource-based view (RBV), dynamic capability view (DCV), and the existing literature, a conceptual research model was prepared. The model was then validated using the PLS-SEM technique to analyze the responses of the 323 managers at different MNEs. The study found a significant positive impact of global risk management capability on GVC capability, which eventually impacted MNE performance.

Aloulou W., Ayadi F., Ramadani V., **Dana L.-P.** (2024). Dreaming digital or chasing new real pathways? Unveiling the determinants shaping Saudi youth's digital entrepreneurial intention. *International Journal of Entrepreneurial Behaviour and Research*, 30 (2-3), pp. 709 – 734. DOI: [10.1108/IJEBR-10-2022-0942](https://doi.org/10.1108/IJEBR-10-2022-0942)

**Purpose:** The purpose of this study, based on the theory of planned behaviour (TPB) and digital entrepreneurship literature, is to unveil the role of digital entrepreneurial knowledge and entrepreneurial role models in shaping digital entrepreneurial intentions (DEIs) among Saudi Youth through a moderated mediation perspective. This study aims to propose that the relationship between digital entrepreneurial knowledge and intention is mediated by main TPB antecedents under the moderating role of entrepreneurial role models.

**Design/methodology/approach:** Data were collected from a sample of 487 Saudi students from three main Saudi public universities located in Riyadh using an online survey questionnaire. By applying SEM, this study builds and tests the measurement and structural models to examine



the hypothesised relationships among main variables. Findings: Results revealed that the main antecedents of TPB (namely, attitudes towards digital entrepreneurship and perceived control behaviour) are significantly related to DEI. In addition, digital entrepreneurial knowledge indicates indirect effects on intentions via these two antecedents. However, entrepreneurial role models exert only a negative and significant moderating effect on the relationship between perceived behaviour control and DEI. Research limitations/implications: This study contributes to the literature by showing how most of the TPB antecedents can play a mediating role between digital entrepreneurial knowledge and the intentions of Saud Youth. The main limitation of this study is that it was not possible to generalise the findings. Future research directions are proposed to add new insights. Practical implications: The results of this study have clear implications for both theory (entrepreneurship scholars) by investigating DEI and its determinants and for practice (entrepreneurship educators and policymakers) by promoting digital entrepreneurship among youth through university-based awareness and building capability programs and curricula. Originality/value: The study helps to understand the role of digital entrepreneurial knowledge in shaping DEI through the development of an extended TPB intention-based model. The findings also indicate that digital entrepreneurial knowledge has indirect effects on Youth's intentions. The findings show insights related to the influence of entrepreneurial role models on TPB antecedents in the transitional context of Saudi Arabia.

[Rahman M.M., Fayolle A., Dana L.P., Rahman M.N. \(2024\). Predicting graduate students' entrepreneurial intentions through innovative teaching in entrepreneurship education: SEM-ANN approach. \*Education and Training\*, 66 \(2-3\), pp. 273 – 301. DOI: 10.1108/ET-06-2023-0236](#)

Purpose: Entrepreneurship education (EE) through innovative teaching techniques (ITEE) and entrepreneurial intention (EI) are two essential components of entrepreneurship development. Using the assumptions of the Theory of Planned Behavior (TPB), we took three constructs: attitude (ATT), subjective norms (SUBNs), and perceived behavioral control (PBC), and from the assumption of Human Capital (HC) theory, we constructed another variable, ITEE. Thus, the fundamental objective of this study is to find out the essential predictor of EI between entrepreneurial antecedents (ATT, SUBNs, PBC) and ITEE through an artificial neural network (ANN). Design/methodology/approach: Using the snowball sampling technique, a highly structured questionnaire was sent to respondents. Finally, a sample size of 397 business graduate students was chosen. Findings: The findings revealed that two dimensions of entrepreneurial antecedents (attitude and subjective norm) positively impacted EI. Furthermore, ITEE partially mediated the relationship between two dimensions of entrepreneurial antecedents (attitude and subjective norm) and EI. Moreover, through ANN, we found that attitude (ATT) was a crucial predictor of EI among business graduate students in Bangladesh. Research limitations/implications: In this study, only business graduate students were included as respondents; thus, further research should include students from other departments or disciplines to generalize the findings. Practical implications: This study covers numerous actors in terms of practical contributions, including students, academics, the government, and the state. This article should draw the attention of Bangladesh government

policymakers regarding the significance of ITEE for developing entrepreneurship. The research framework of this study proposed that ITEE should implement antecedents of entrepreneurship into business education, boosting the ability of students to make judgments, which will also enhance EI in the future. Originality/value: Integrating the TPB theory with human capital theory represents a significant scholarly advancement in business education for graduate students in Southeast Asia, namely Bangladesh. Furthermore, we developed a novel ITEE scale by synthesizing information from many literary sources, providing valuable insights for future researchers.

**Dana L.-P., Salamzadeh A. (2024).** *International Entrepreneurship as a Scholarly Field. Foundations and Trends in Entrepreneurship*, 20 (7), pp. 679 – 780. DOI: [10.1561/0300000112](https://doi.org/10.1561/0300000112)

This monograph presents a comprehensive framework for international entrepreneurship (IE). To make our contribution cohesive, first, we focus our attention on definitions; then, by providing an in-depth analysis of the impacts of both internal and external factors on the decision-making processes of entrepreneurs in the realm of IE, we elaborate on the implications within this domain. Moving beyond existing literature, we use a multi-level analysis. Within this framework, we scrutinize three fundamental units of analysis: the individual entrepreneur, the firm, and the country. It is posited that this approach will facilitate a comprehensive comprehension of the considerations pertinent to international entrepreneurship, along with the principal factors at each level of analysis. By encompassing all three levels, our objective is to illuminate the interconnectedness between individual traits, firm competencies, and national circumstances that shape international entrepreneurial activities. Moreover, we adopt a behavioral perspective to scrutinize how international entrepreneurs perceive, evaluate, and capitalize on opportunities across borders. This lens enables us to acquaint our erudite audience with the decision-making procedures of these individuals. Consequently, this approach is expected to yield a more profound and nuanced insight into the motivations, risk assessments, and cognitive predispositions that shape the international entrepreneurial behavior of entrepreneurs. We believe this monograph will serve as a comprehensive and integrated resource for scholars and practitioners interested in international entrepreneurship.

**Nziku D.M., Dana L.-P., Clausen H.B., Salamzadeh A. (2024).** *Women entrepreneurs in the Middle East: Context, ecosystems, and future perspectives for the region.* World Scientific Publishing. DOI: [10.1142/13599](https://doi.org/10.1142/13599)

Straddling North Africa and Western Asia, the Middle East has been a cradle of civilisation and entrepreneurship - well before the arrival of Islam. In this region, gender roles were traditionally specified by culture, with women often expected to stay within the family environment, while men would trade in society at large. This book contributes to the literature on a highly neglected field of study: women entrepreneurs in the Middle East. Recognising that entrepreneurship does not take place in a vacuum, it focuses on contexts, and the ecosystems of this region with largely patriarchal societies, that are influenced by culture, religion, and colonial experience. This book provides readers with a topical analysis of women entrepreneurs



in the Middle East on the context, ecosystems, and future perspectives for the region. Authors have presented the reality of 11 countries from the region based on women entrepreneurs' historical backgrounds, challenges, and achievements, as well as the contribution towards economic development in their local/immediate communities and the Middle East at large. Following the country analysis by the authors of each chapter, the editors provide a general assessment of the future of women entrepreneurs in the region by focusing on the current entrepreneurship policy and strategies of various countries in the region. This volume will be an essential reading for anyone researching or working on projects related to women's entrepreneurship and small businesses in the Middle East.

Simba A., Tajeddin M., **Dana L.-P.**, Ribeiro Soriano D.E. (2024). Deconstructing involuntary financial exclusion: a focus on African SMEs. *Small Business Economics*, 62 (1), pp. 285 – 305. DOI: [10.1007/s11187-023-00767-1](https://doi.org/10.1007/s11187-023-00767-1)

Small and medium-sized enterprises (SMEs) struggle to obtain credit when credit ratings and collateral are used as criteria to assess their credit applications. In the context of Africa, the financial markets have gaping institutional voids, and contextual insights into SMEs' experiences remain underdeveloped. Drawing on the stakeholder-agency theory of debt financing, this paper advances the scholarly conversation by theorising about how collateral security, collateral security value and the gender of SME owners lead to the involuntary financial exclusion of many manufacturing businesses in Africa. Analysis of the World Bank Enterprise Survey (WBES) dataset reveals that collateral security and collateral security value, together with gender biases in Africa's financial markets, reduce credit access potential. Consequently, SMEs' perceptions of the likelihood of obtaining credit for business purposes are reduced. Empirical results for 13,783 SMEs across 41 African countries indicate that the motivations to apply for credit also diminish. These observations contribute to entrepreneurial financing and SME research.

Haq M., Johanson M., Davies J., Ng W., **Dana L.-P.** (2024). Bourdieusian and resource-based perspectives on ethnic minority microbusinesses: The construction of a culture-induced entrepreneurship model. *Journal of Small Business Management*, 62 (4), pp. 1982 – 2015. DOI: [10.1080/00472778.2023.2192760](https://doi.org/10.1080/00472778.2023.2192760)

In contemporary developed Western societies, structural discrimination often bars ethnic minorities from entering mainstream entrepreneurship and labor markets. Consequently, minorities engage in microentrepreneurship for economic survival and to retain their social identities. Yet despite the economic value of ethnic minority microbusinesses, little is known about the underlying forces that develop fundamental resources which shape their performance. Based on Bourdieu's forms of capital and the resource-based view of the firm, our study presents a novel culture-induced entrepreneurship model. This model explains how ethnic minority culture shapes the development of human capital resources and how these resources contribute to business performance in communities which are often characterized as

“left behind.” Our study challenges the dominant underdog discourse of (cultural) capital deficit among ethnic minority entrepreneurs.

Varshney N., Agarwal S., **Dana L.P.**, Dwivedi A.K. (2024). An Investigation of Factors Towards Family Business Sustainability: Perspective from India, a Developing Economy. *Journal of Family and Economic Issues*. DOI: [10.1007/s10834-024-09997-1](https://doi.org/10.1007/s10834-024-09997-1)

Family business dominates the Indian corporate landscape, reflecting the country’s strong familial culture. While sustainability in family business is a growing research area, its understanding in the Indian context remains limited. This study aims to investigate the factors contributing to family business sustainability in India and examines the relationships among these factors. Employing a qualitative approach, this research analyzes multiple case studies from Gujarat and Rajasthan. Data was collected through in-depth interviews with family business owners and successors and analyzed using content analysis. The findings reveal five key factors contributing to family business sustainability: succession planning, strategic diversification and expansion, innovation and adaptability, mentorship and knowledge transfer, and competitive advantage. A conceptual framework illustrates the interconnectedness of these factors, highlighting how succession planning supports knowledge transfer and fosters innovation, while strategic diversification often requires innovative approaches. This research offers valuable insights for family business owners navigating growth and sustainability challenges. It also provides a foundation for policymakers to develop targeted measures supporting family business, which significantly contribute to India’s economy. The study’s originality lies in its focus on the Indian context, offering a nuanced understanding of family business sustainability in a rapidly evolving emerging economy. By exploring the unique characteristics of Indian family businesses, this research contributes to the literature on family business sustainability in diverse cultural contexts.

Ben Fatma E., **Dana L.-P.**, Elleuch S., Ben Mohamed E. (2024). Does dispositional optimism affect entrepreneurial success? Evidence from Saudi Arabia. *International Entrepreneurship and Management Journal*, 20 (2), pp. 1127 – 1152. DOI: [10.1007/s11365-024-00946-w](https://doi.org/10.1007/s11365-024-00946-w)

This study explores the effect of dispositional optimism bias on entrepreneurial success. By reviewing a mixture of previous studies from different disciplines: psychology, business and economics, we predict that this bias can positively affect entrepreneurial success. Based on a sample of 255 entrepreneurs in the Kingdom of Saudi Arabia and using the LOT-R psychometric test to measure the level of dispositional optimism among entrepreneurs, the effect of this variable on entrepreneurial success was tested, and the results show that this bias positively affects entrepreneurial success. Entrepreneurial success was also measured through three different proxies: the level of entrepreneurs’ satisfaction with what has been achieved from their entrepreneurial projects, the variation in the number of employees, and sales growth and the results were stable. We also find that entrepreneurs’ experience, age, and gender can influence entrepreneurial success. Finally, we should view entrepreneurial success not only as a function of traditional variables but also as a function of psychological biases.

Salamzadeh A., **Dana L.-P.**, Rastgoo N., Hadizadeh M., Mortazavi S.M. (2024). The Role of Coopetition in Fostering Innovation and Growth in New Technology-based Firms: A Game Theory Approach. *BAR - Brazilian Administration Review*, 21 (1), art. no. e230097. DOI: 10.1590/1807-7692bar2024230097

Objective: New technology-based firms (NTBFs) are key actors in creating value through innovation, but they face significant challenges in the rapidly changing and competitive technological environment. Methods: This research is a multi-method analysis aiming to present a model of relationships among drivers for collaboration and competition among technology-based companies and identify effective actions and policies to enhance coopetition (cooperation and competition) that can boost the ability of NTBFs to grow and commercialize innovations. The methodology of this study is exploratory in nature. Thus, it employs literature review method for gathering qualitative data, Fuzzy Delphi method for collecting data from experts, and DEMATEL-ISM method for modeling the relationships among drivers and demonstrating the impact of coopetition on the performance of NTBFs. Results: The research findings show that coopetition can improve growth, innovation, and commercialization in NTBFs by overcoming technological and competitive limitations. Conclusions: The study offers practical and social implications for managers, policy makers, and economic development by highlighting the role of coopetition in fostering innovation and prosperity.

**Dana L.-P.**, Salamzadeh A. (2024). An overview of key issues in entrepreneurship research methods. *Big Questions and Great Answers in Entrepreneurship Research: Discussing Up-to-date Methodological and Philosophical Issues*, pp. 94 – 108. DOI: 10.4337/9781800888661.00012

[no abstract]

Yordanova D., **Dana L.-P.**, Manolova T.S., Pergelova A. (2024). Digital Technologies and the Internationalization of Small and Medium-Sized Enterprises. *Sustainability (Switzerland)* , 16 (7), art. no. 2660. DOI: 10.3390/su16072660

[no abstract]

**Dana L.-P.**, Zailani S.H.B.D.M. (2024). Foreword. *Sustainable Partnership and Investment Strategies for Startups and SMEs*, pp. xv - xvi

[no abstract]

Hosseini A., Ghasempour Ganji S.F., **Dana L.-P.** (2024). Gender, emotional support and innovative behavior: psychological capital as a mediator. *Management Decision*, 62 (12), pp. 4095 – 4117. DOI: 10.1108/MD-02-2023-0266

Purpose: This paper explores the direct and indirect effects of family emotional, social and organizational support on Innovative Work Behavior (IWB) through psychological capital (Psy.Cap). Design/methodology/approach: Selected by conducting stratified random sampling



techniques, 397 employees completed a questionnaire. We used structural equation modeling and multi-group testing by Smart-PLS3 to analyze the data. Findings: Findings reveal that all sources of social-emotional support, including family, supervisor and co-worker support, positively affect Psy.Cap. Moreover, Psy.Cap mediates the effect of family, co-workers and supervisors' emotional support on IWB. The multi-group analysis indicates that all relationships in the model are significant for both groups of males and females; however, there are no significant differences in the link between organizational support and psychological capital, as well as family and co-worker support and innovative work behavior between males and females. The study's results demonstrate the significantly higher impact of family emotional support – Psy.Cap and supervisor support on IWB amongst females compared to their male counterparts. Originality/value: The implications of this research highlight the importance of considering affective factors on employees' IWB, as well as the differences between genders in this regard.

Salamzadeh A., **Dana L.-P.**, Ebrahimi P., Hadizadeh M., Mortazavi S. (2024). Technological barriers to creating regional resilience in digital platform-based firms: Compound of performance sensitivity analysis and BIRCH algorithm. *Thunderbird International Business Review*, 66 (2), pp. 135 – 149. DOI: [10.1002/tie.22371](https://doi.org/10.1002/tie.22371)

Entrepreneurial ventures face various problems contributing to the regional resilience of their districts. Among such firms are digital platform-based businesses that could have exponential impacts—indeed, if they succeed in overcoming the barriers. Thus, this study aims to identify the major technological barriers to creating regional resilience in Iran's innovation districts. This study uses the analytical hierarchy process method and an unsupervised machine learning algorithm, as well as the Delphi technique. Online panel surveys are conducted to collect data from experts in the field of online social platforms. The findings show that digital literacy barriers and cultural barriers are the criteria with the uppermost and lowermost importance. Performance sensitivity analysis illustrates that considering the C1 and C4 criteria, the Digikala platform is more resistant to technological barriers compared to other platforms. Furthermore, based on C2 and C3 criteria, it can be stated that the Snapp platform reveals better resistance than the other platforms. The importance-performance matrix also shows that all platforms need more attention in terms of performance. Besides, the results of the BIRCH analysis show that the present model's accuracy is 88%. Meanwhile, outputs show that experts are divided into four groups or four different thoughts.

Putcha C., Misra S.C., **Dana L.-P.**, Somarajupalli K.S., Holleran J., Bode S.S. (2024). Optimal value determination using traditional and newly developed method based on using initial basic feasible solution of a transportation problem using northwest and Russell method. *World Review of Science, Technology and Sustainable Development*, 20 (1), pp. 19 – 34. DOI: [10.1504/WRSTSD.2024.136010](https://doi.org/10.1504/WRSTSD.2024.136010)

This paper utilises a transportation problem scenario to conduct a study on optimisation of transportation problems that are formatted as linear programming problem. Initially,

Northwest corner rule and the Russell's method are used to obtain the highest initial basic feasible (IBF) solutions and then a Putcha-Bhuiyan method is proposed to obtain an optimal solution. The Putcha-Bhuiyan method provides the optimal solution with fast convergence of transportation problems. This method results in an optimal solution by making appropriate changes to the IBF solution and eliminating the need to conduct iterations using chain reaction or transportation simplex algorithm. To explain and justify the advantages of the Putcha-Bhuiyan method, the solution to the problem scenario was compared with the transportation simplex method. While the justification of the Putcha-Bhuiyan method is with only one problem scenario, it will be very useful for solving multiple and large-scale optimisation problems that are faced in many disciplines. These concepts are dominantly utilised in disciplines like industrial engineering, mechanical engineering, smart manufacturing, and supply chain management.

Rahman M.M., Salamzadeh A., **Dana L.P.**, Braga V. (2024). Work-Family Balance, Digital Leadership Skills, and Family Social Support as the Predictors of Subjective Well-Being of Y-Generation Managers. *Strategic Change*. DOI: [10.1002/jsc.2628](https://doi.org/10.1002/jsc.2628)

Over the past few years, academic scholars have shifted toward paying more attention to work-family balance, family social support, and subjective well-being, as these are critical issues for mature employees. Besides, Y-Gen managers are more concerned about their digital leadership skills, which is also crucial for subjective well-being. However, for this study, the researchers have constructed the main research variables (work-family balance, digital leadership skills, family social support, and subjective well-being) based on the assumptions of spillover theory and conservation of resources (COR) theory. The current study has three distinct objectives: (a) to determine the impact of work-family balance, digital leadership skills, and family social support on subjective well-being, (b) to test the mediation effects of family social support in the relationships between work-family balance, digital leadership skills and subjective well-being (c) to test the moderation effects of gender on the relationships between work-family balance, digital leadership skills and subjective well-being. Using the convenience sampling technique, data was taken from 314 Y-Gen mid and top-level managers working in the private sector in Bangladesh. The findings revealed that work-family balance, digital leadership skills, and family social support positively affect Y-Gen managers' subjective well-being. Besides, family social support partially mediates the relationships between work-family balance, digital leadership skills and subjective well-being. However, gender does not have any moderation effect on the relationship between work-family balance, digital leadership skills and subjective well-being. Therefore, the higher authority needs to focus more on Y-Gen managers regarding work-family balance and digital leadership skills.

Armutcu B., Ramadani V., Zeqiri J., **Dana L.-P.** (2024). The role of social media in consumers' intentions to buy green food: evidence from Türkiye. *British Food Journal*, 126 (5), pp. 1923 – 1940. DOI: [10.1108/BFJ-11-2022-0988](https://doi.org/10.1108/BFJ-11-2022-0988)

**Purpose:** There is limited research examining the relationship between social media and green food purchasing behaviour. In the current study, we examine the factors that affect consumers' green food purchasing behaviour in Türkiye. **Design/methodology/approach:** Data collected from the participants by survey method were analysed using Smart PLS 4.0 with IBM SPSS 26 and PLS to run SEM. **Findings:** Our findings have revealed that from all the structural elements in the theory of planned behaviour (TPB), only attitude and perceived behavioural control contribute to consumers' green food purchasing behaviour, while subjective norms do not contribute to consumers' green food purchasing behaviour. Additionally, it was found that social media usage (SMU) and digital marketing interactions (DMI) have a positive and significant effect on green food purchasing behaviour. More information, experiences, opinions and recommendations on green foods in social media channels can encourage consumers to buy more green food. **Originality/value:** This study first evaluates the applicability of the TPB model in explaining green food purchasing behaviour. This study is extended with two new factors included in the original framework of the TPB model, namely, SMU and DMI.

[Suwanmaneepong S., Llonas C., Kerdsriserm C., Kharmkhan J., Sabaijai P.E., Samanakup T., Kaewtaphan P., Chourwong P., Mankeb P., Dana L.-P. \(2024\). Participatory value chain development. Insights from community-based enterprise in rural Thailand. \*International Journal of Agricultural Sustainability\*, 22 \(1\), art. no. 2371703. DOI: 10.1080/14735903.2024.2371703](#)

Amidst the fast-changing consumer behavior and the impact of the COVID-19 pandemic, community-based enterprises (CBEs), particularly startups, face the challenge of identifying strategic business models. The situation necessitates a collaborative and tailored approach to address the impediments CBEs encounter. Focusing on rural CBEs in Thailand, our research employs a participatory approach to value chain development, offering insights on enhancing value addition through stakeholder collaboration. The study explores how a participatory approach applied in rural Thailand facilitates overcoming obstacles and capitalizing on opportunities for economic growth, sustainability, and community inclusivity. By examining the application of participatory value chain development, this research contributes to a better understanding of how participatory value chain development can be tailored to meet the unique needs of community-based enterprises, particularly in post-COVID-19 market adaptations.

[Almaiman M., Salloum C., Ramadani V., Ezzeddine B.M., Dana L.-P. \(2024\). Institutional dynamics and governance structures in shaping CSR, social entrepreneurship, and private equity investment. \*Journal of Small Business and Entrepreneurship\*. DOI: 10.1080/08276331.2024.2440834](#)

This study examines how governance structures and institutional dynamics influence corporate social responsibility (CSR) and social entrepreneurship disclosures within the context of Saudi Arabia, particularly under the Vision 2030 initiative. Using a sample of 108 non-financial Saudi companies with 324 annual reports, we applied Legitimacy Theory to explore how companies respond to social expectations and pressures in an emerging market. Our findings reveal that



governance structures, particularly board characteristics and CEO financial education, significantly impact CSR disclosure and social entrepreneurship practices. The results suggest that aligning governance with CSR expectations fosters a more sustainable and socially responsive corporate landscape, especially in emerging markets like Saudi Arabia. These insights underscore the need for policies that support transparency and social engagement, driving responsible corporate behavior.

Verdie J.-F., Salloum C., Jarrar H., **Dana L.-P.** (2024). Community-based economic romance and integration: assessing the feasibility of a currency union in South Asia. *Journal of Enterprising Communities*, 18 (6), pp. 1415 – 1430. DOI: [10.1108/JEC-06-2024-0108](https://doi.org/10.1108/JEC-06-2024-0108)

**Purpose:** This purpose of this study aims to critically evaluate the feasibility of establishing a single currency area within the South Asian Association for Regional Cooperation (SAARC) by examining the economic integration of its member states. The analysis focuses on the extent to which the region meets the criteria of the optimum currency area (OCA) theory, particularly in terms of business cycle synchronization, labor mobility and capital flows.

**Design/methodology/approach:** Using a vector autoregression (VAR) model within the aggregate demand-aggregate supply framework, this research investigates the symmetry of supply and demand shocks across SAARC economies. The study analyzes the synchronization of business cycles and the mobility of labor and capital to determine the readiness of SAARC for a unified currency. **Findings:** The results indicate significant asymmetries in business cycles among SAARC countries, with substantial disparities in economic responses to shocks. These findings suggest that the region lacks the necessary economic synchronization required for a successful single currency area. Limited labor and capital mobility further complicate the potential for economic integration within SAARC. **Research limitations/implications:** The study is constrained by data inconsistencies and the limited range of economic indicators available for SAARC countries. Future research should expand the analysis to include a broader set of socioeconomic factors and more comprehensive data sets to better assess the region's potential for monetary integration. **Practical implications:** The study highlights the challenges of forming a currency union in South Asia due to economic disparities and limited mobility.

However, gradual steps toward deeper regional integration, improved financial infrastructure and enhanced cross-border collaboration could foster long-term economic stability, growth and social cohesion in the SAARC region. **Social implications:** The research highlights the potential social benefits of enhanced economic integration, such as increased community resilience and social cohesion, while also warning of the risks associated with premature monetary union in a region with significant economic disparities. **Originality/value:** This study provides a detailed analysis linking the theoretical framework of the OCA to the practical realities of economic integration in South Asia. By focusing on the specific economic conditions of SAARC member states, the research offers valuable insights for policymakers considering regional monetary integration.

Kotiranta A., Puumalainen K., Sjögren H., **Dana L.-P.** (2024). Digitalization as a growth driver for social enterprises. *Technological Forecasting and Social Change*, 209, art. no. 123837. DOI: [10.1016/j.techfore.2024.123837](https://doi.org/10.1016/j.techfore.2024.123837)

Social enterprises' motivations for growth arguably stem from their social missions, which can result in moderate business growth due to conflicting interests and the trade-off costs of impact scaling and growing their business. Digitalization has been suggested as one method of enabling the simultaneous growth of business and social or environmental impact. In this study, we analyze the digital orientation of social enterprises and test whether our hypotheses regarding the superior business benefits of digitalization for social enterprises can be empirically confirmed. Our results show social enterprises as early adopters of digitalization, who have higher expectations that digitalization will benefit them and tend to invest more in digital technologies and capabilities than commercial companies do. However, the strong digital orientation of social enterprises does not manifest better business growth. Furthermore, the findings suggest that social enterprises' investment in social media has hampered their productivity. Our findings challenge current theoretical arguments that claim that digitalization has particular benefits for social enterprises, and we suggest that the digital antecedents of social enterprise growth are, after all, very similar to those of other small and medium-sized enterprises.

Ogundana O., Simba A., **Dana L.-P.**, Liguori E. (2024). A growth model for understanding female-owned enterprises. *Journal of the International Council for Small Business*, 5 (2), pp. 85 – 94. DOI: [10.1080/26437015.2022.2100296](https://doi.org/10.1080/26437015.2022.2100296)

Numerous policy initiatives designed to support the growth of female-owned enterprises in the developing economies have repeatedly failed to achieve their objectives. Research recognizes the lack of contextualized growth models for defining female-owned enterprises in such contexts as the main issue. Thus, and drawing from our qualitative data, we propose a growth model to account for the business development activities of female-owned enterprises from a developing economy perspective. Through analyzing our qualitative data, it emerged that money (access and utilization), management (nonformal education and experience), and market (customer intelligence) were direct determinants of the growth trajectories of female-owned enterprises. Motherhood (household and family), meso- (membership of professional networks and social learning), and macro-environment (sociocultural and economic issues) indirectly influenced their growth by mediating women's access and utilization of the aforementioned direct determinants. From that, we offer recommendations for practitioners including public authorities and key actors within the entrepreneurial ecosystem that provide the support infrastructure for female-owned enterprises in a developing economy.

Rahman M.M., Salamzadeh A., **Dana L.P.** (2024). Shackled feet: A review of women entrepreneurs' challenges in developing countries. *Entrepreneurial Business and Economics Review*, 12 (1), pp. 177 – 193. DOI: [10.15678/EBER.2023.120110](https://doi.org/10.15678/EBER.2023.120110)

**Objective:** The fundamental objective of this systematic literature review (SLR) is to explore the current challenges for women entrepreneurs in developing countries and discuss future research opportunities. **Research Design & Methods:** We applied a SLR approach to fulfil the objective. We selected 29 articles from SCOPUS and Google Scholar databases to synthesize reviews. To ensure the quality of the articles collected from Google Scholar, we used Scimago Journal & Country Rank (SJR). **Findings:** We categorised the key findings into themes (T), contexts (C), and methodologies (M). The major challenges for women entrepreneurs in developing countries cover five themes, i.e. (1) financial, (2) socio-cultural, (3) educational and skills, (4) networking and marketing, (5) political and legal. Developing countries were the main context (C) of this review. Regarding methodologies (M), 51.72% of the collected articles were qualitative. **Implications & Recommendations:** Policymakers can help make more specialized women entrepreneurship policies by assembling research identifying national barriers empirically and drawing comparisons between the realities of both countries and regions. We proposed a conceptual framework or model based on the challenges of women entrepreneurship and other future research agendas. **Contribution & Value Added:** This review article is one of the leading studies which helps academics, research-ers, and readers gain a deeper understanding of challenges for women entrepreneurs in developing countries by providing a foundation for future studies and encouraging researchers to investigate this topic.

Zakpaa J., **Dana L.-P.** (2024). Multivariate analysis of ethnic migrants' entrepreneurial motivation in Ghana. *International Journal of Business and Globalisation*, 36 (4), pp. 469 – 521. DOI: [10.1504/IJBG.2024.138020](https://doi.org/10.1504/IJBG.2024.138020)

This study was a cross-sectional survey, and it sought to determine the multivariate structure of factors affecting the self-employment entrepreneurial motivation of internal ethnic migrant entrepreneurs in Ghana. A total of 210 entrepreneurs were selected through simple random sampling in the four major cities in Ghana. High dimensional sets of data produced from a Likert scale with 71 indicator variables of migrant entrepreneurial motivation factors, which were incorporated into a structured questionnaire, were factor analysed, using SPSS version 21. The findings revealed that the significant influences on the entrepreneurial motivation of this group of ethnic migrant entrepreneurs, consisted of factors such as relational social capital or informal personal networks, wealth creation through human capital development, lack of fear of risks taking, impact of a previous job, the effect of the regulatory environment, labour market-based unemployment, access to start-up capital through personal savings, culture, and increase wealth motivation.

Arize A., Okoyeuzu C.R., Ujunwa A., Ujunwa A., **Dana L.-P.**, Kalu E.U. (2024). Trading Off Equality and Employment Gains in Sub-Saharan Africa. *International Trade Journal*, 38 (3), pp. 300 – 320. DOI: [10.1080/08853908.2024.2308292](https://doi.org/10.1080/08853908.2024.2308292)

This study examines the interaction of trade, inequality, and unemployment in Sub-Saharan Africa (SSA) from 1997 to 2021. Results from the mean group and pooled mean group estimation revealed that international trade explains a 6% rise in inequality and a 43% rise in



unemployment. Our findings provide evidence that international trade, as currently structured, is not beneficial to SSA countries, despite the adoption of trade liberalization policies and regional trade agreements (RTAs). We argue that SSA countries could still derive gains from trade if they undertake massive structural reforms that address labor market frictions and skills gaps in the region.

Lembke S., Cartier L., Fountain J., Cradock-Henry N., **Dana L.-P.** (2024). A model for understanding industry cluster development among New World wineries. *International Journal of Entrepreneurship and Small Business*, 52 (1), pp. 28 – 46. DOI: [10.1504/IJESB.2024.137755](https://doi.org/10.1504/IJESB.2024.137755)

This paper proposes a cluster management model that is grounded in Porter’s diamond framework and cluster thinking. This exploratory research examines secondary sources to understand the presence and development of clusters in two New World wine regions over two time periods (2000–2008 and 2009–2014). Whilst different in development trajectories and focus, and impacted by very different legislative frameworks, both wine regions displayed high quality strategic alignment during their inception stage but this deteriorated over time. The authors suggest that if the emerging lack of strategic alignment had been identified early, addressing it may have limited or halted the deterioration. This research introduces a pragmatic tool for industry assessment of cluster strength and decision making that is easy to use for regional development practitioners. Such an applied tool is valuable in agricultural clusters where challenges posed by climate change, the globalisation of markets, or the massive disruption caused by a global pandemic requires increasingly rapid cluster adaptation.

Haq M., Johanson M., Davies J., Ng W., **Dana L.-P.** (2024). Human capital resources creation and utilization in ethnic minority microbusinesses: The construction of a culture-induced entrepreneurship model. *Journal of the International Council for Small Business*, 5 (2), pp. 106 – 116. DOI: [10.1080/26437015.2023.2201692](https://doi.org/10.1080/26437015.2023.2201692)

We explored and found that a set of key resources, that we call human capital resources, play an important role in ethnic minority microbusinesses in an ethnic majority social and economic space. We have also found that these key resources are developed and maintained within the coethnic niche economic space shaped by coethnic cultural value systems. Building on qualitative interview data and drawing on Bourdieu’s forms of capital and the resource-based view of the firm, our study presents a novel microentrepreneurship model that we call the culture-induced entrepreneurship model. Overall, our model provides insights into how ethnic minority culture informs the creation of a set of human capital resources and how these key resources contribute to business performance in regional ethnic minority microbusinesses. Our model also shows relationships between these key human capital resources.

Mohammed El Hazzouri

Hamilton, L. K., **El Hazzouri, M.**, Ari, E., & Banerjee, P. (2024). Antistigma mental health advertisements can create backlash for racialized immigrants. *Stigma and Health*. Advance online publication. DOI: [10.1037/sah0000566](https://doi.org/10.1037/sah0000566)

How can public health advertisements be designed in a way that is racially critical, inclusive, and effective? In this research, we examine antistigma mental health campaigns within the context of immigrants' mental health which has been a concern for public health authorities (Government of Canada, 2023) and stigma researchers (Mianji et al., 2020). In Study 1, we conducted focus groups with 10 Black immigrants who were asked about their perceptions of public health ads that featured Black models. In Study 2, we conducted focus groups with 24 racialized immigrant women who provided suggestions for how to design racially critical, destigmatizing public health advertisements. Findings contribute to emerging evidence that targeted public health ads can create a backlash effect when people feel negatively stereotyped by the advertisers (El Hazzouri & Hamilton, 2019). Across two studies, results revealed that participants feel negatively stereotyped when mental health ads portray one racialized group. They prefer advertisements that showcase models from several races, cultures, ages, and religions. Using an intersectional framing (Else-Quest, 2023), findings reveal the complex experiences of racialized immigrants. We argue that we must center racialized immigrants' voices to develop culturally responsive public health communications (Pérez-Flores & Cabassa, 2021). Results from these studies inform the development of racially critical, culturally sensitive public health ads, thereby helping to address the unintended effects of antistigma health campaigns.

Iraj Fooladi

Fatemi A., **Fooladi I.**, **Zhao Y.**, Ma Z. (2024). On the superior performance of SRI funds. *International Review of Economics and Finance*, 93, pp. 567 – 581. DOI: [10.1016/j.iref.2024.03.059](https://doi.org/10.1016/j.iref.2024.03.059)

We compare the performance of 1126 US mutual funds deemed socially responsible to that of a matching sample of conventional funds over the three-decade period January 1980–December 2019. The comparisons are made over the entire period as well as the descending (bear) and ascending (bull) market subperiods, classified either according to the NBER method or the regime switching model. Our results indicate that SRI funds outperform their peers over the entire sample period. Additionally, regardless of the method used to identify market condition or the asset pricing model employed, SRI funds as a group significantly outperform their conventional counterparts during bull markets but insignificantly so during bear markets. However, all-equity SRI funds and those that includes Equity and Fixed Income funds, significantly outperform their peers under either regime, with both methods and for all asset pricing specifications. Further examination indicates that the main driver of differences in the performance of SRI funds and their conventional peers can be attributed to their superior selection ability.

Fatemi A., **Fooladi I.**, **Sy O.**, Zaman A. (2024). Corporate headquarters relocation and CSR performance. *International Review of Economics and Finance*, 89, pp. 622 – 637. DOI: [10.1016/j.iref.2023.10.014](https://doi.org/10.1016/j.iref.2023.10.014)

This study examines the relationship between corporate headquarters relocation decisions and corporate social responsibility (CSR). If the cost-savings motive is the primary force behind the relocation decision, we would expect to observe a reduction in CSR commitments of relocating firms. Our results fail to provide support for the occurrence of such a reduction, even when the move affords the firm an opportunity to do so. Following a move, firms do not reduce their CSR commitments. On the contrary, the average firm tends to significantly improve its CSR scores in the “environment” and “overall” categories. Our findings hold even after accounting for fixed effects, control variables, and addressing issues of heterogeneity and endogeneity. In investigating the driver of this outcome, we find that the local political environment of the new headquarters location plays an important role. In particular, a stronger tendency to increase CSR activities is mostly associated with relocations to a Democratic rather than a Republican state.

Paola Gonzalez

Oyibo K., **Gonzalez P.A.**, Ejaz S., Naheyan T., Beaton C., O'Donnell D., **Barker J.R.** (2024). Exploring the Use of Persuasive System Design Principles to Enhance Medication Incident Reporting and Learning Systems: Scoping Reviews and Persuasive Design Assessment. *JMIR Human Factors*, 11 (1), art. no. e41557. DOI: 10.2196/41557

Background: Medication incidents (MIs) causing harm to patients have far-reaching consequences for patients, pharmacists, public health, business practice, and governance policy. Medication Incident Reporting and Learning Systems (MIRLS) have been implemented to mitigate such incidents and promote continuous quality improvement in community pharmacies in Canada. They aim to collect and analyze MIs for the implementation of incident preventive strategies to increase safety in community pharmacy practice. However, this goal remains inhibited owing to the persistent barriers that pharmacies face when using these systems. Objective: This study aims to investigate the harms caused by medication incidents and technological barriers to reporting and identify opportunities to incorporate persuasive design strategies in MIRLS to motivate reporting. Methods: We conducted 2 scoping reviews to provide insights on the relationship between medication errors and patient harm and the information system–based barriers militating against reporting. Seven databases were searched in each scoping review, including PubMed, Public Health Database, ProQuest, Scopus, ACM Library, Global Health, and Google Scholar. Next, we analyzed one of the most widely used MIRLS in Canada using the Persuasive System Design (PSD) taxonomy—a framework for analyzing, designing, and evaluating persuasive systems. This framework applies behavioral theories from social psychology in the design of technology-based systems to motivate behavior change. Independent assessors familiar with MIRLS reported the degree of persuasion built into the system using the 4 categories of PSD strategies: primary task, dialogue, social, and credibility support. Results: Overall, 17 articles were included in the first scoping review, and 1 article was included in the second scoping review. In the first review, significant or serious harm was the most frequent harm (11/17, 65%), followed by death or fatal harm (7/17, 41%). In the



second review, the authors found that iterative design could improve the usability of an MIRLS; however, data security and validation of reports remained an issue to be addressed. Regarding the MIRLS that we assessed, participants considered most of the primary task, dialogue, and credibility support strategies in the PSD taxonomy as important and useful; however, they were not comfortable with some of the social strategies such as cooperation. We found that the assessed system supported a number of persuasive strategies from the PSD taxonomy; however, we identified additional strategies such as tunneling, simulation, suggestion, praise, reward, reminder, authority, and verifiability that could further enhance the perceived persuasiveness and value of the system. Conclusions: MIRLS, equipped with persuasive features, can become powerful motivational tools to promote safer medication practices in community pharmacies. They have the potential to highlight the value of MI reporting and increase the readiness of pharmacists to report incidents. The proposed persuasive design guidelines can help system developers and community pharmacy managers realize more effective MIRLS.

Greg Hebb

**Hebb G., Lin S. (2024).** Are banks better money doctors? An analysis of mutual fund flows of bank and non-bank funds using Canadian data. *North American Journal of Economics and Finance*, 69, art. no. 102025. DOI: [10.1016/j.najef.2023.102025](https://doi.org/10.1016/j.najef.2023.102025)

This study uses Canadian mutual fund data from 2005 to 2020 to compare fund flows of bank managed mutual funds with those of non-bank managed mutual funds. We document that relative to non-bank funds, bank funds consistently exhibit lower flows on a monthly basis. Moreover, bank funds demonstrate lower flow-sensitivity to performance than non-bank funds. Further investigation reveals this effect is driven largely by lower outflows following poor performance, as it appears that these investors are trusting of fund managers enough to stay the investment course. We further separate the data into equity, bond, and balanced funds and find that the flow difference between bank and non-bank funds is largest in equity funds, smaller in balanced funds, but non-existent in bond funds. Finally, we document that this effect is dramatically weakening over our sample period. Our study has meaningful implications for regulators, fund investors, banks, as well as mutual fund managers.

Shuna Ho

**Ho S.S.H., Oh C.H., Shapiro D. (2024).** Can Corporate Social Responsibility Lead to Social License? A Sentiment and Emotion Analysis. *Journal of Management Studies*, 61 (2), pp. 445 – 476. DOI: [10.1111/joms.12863](https://doi.org/10.1111/joms.12863)

The term social license (SL) refers to the acceptance or approval by a community of a company's presence. It is generally assumed in the literature that effective corporate social responsibility (CSR) actions will lead to an SL. In this study we examine the CSR-SL relationship at the local community level and establish boundary conditions on the effectiveness of local CSR in creating an SL. Using consent-based micro-social contract theory, we theorize that

commitment to local CSR improves the level to which a local community grants an SL to a multinational corporation (MNC), but the impact is moderated by the global legitimacy of the parent company, the nature of institutions in the host country, and the degree of polarization within the focal community. Based on 3696 articles regarding 43 global mining MNCs operating in 523 local communities between 2008 and 2020, we use natural language processing and sentiment analysis to evaluate the degree to which a local community grants an SL. Our empirical evidence indicates that local CSR does positively influence the granting of an SL, but the effect is reduced when there is strong rule of law or high community polarization and increased when the focal firm has strong global legitimacy.

Albert James

Tetzlaff E., **James A.E.** (2024). Careers. *Elgar Encyclopedia of Family Business*, pp. 41 – 4. DOI: [10.4337/9781800888722.ch07](https://doi.org/10.4337/9781800888722.ch07)

[no abstract]

Tetzlaff E., Dempsey D., **James A.E.** (2024). Heterogeneity. *Elgar Encyclopedia of Family Business*, pp. 242 – 243. DOI: [10.4337/9781800888722.ch56](https://doi.org/10.4337/9781800888722.ch56)

[no abstract]

Tetzlaff E., **James A.E.** (2024). Non-Family Employees. *Elgar Encyclopedia of Family Business*, pp. 317 – 319. DOI: [10.4337/9781800888722.ch79](https://doi.org/10.4337/9781800888722.ch79)

[no abstract]

Frederick King

**King F.D.** (2024). *Queer Books of Late Victorian Print Culture*. *Edinburgh University Press*

Brings together queer theory and textual studies to revise our understanding of nineteenth-century print culture • Examines the collaboration of queer writers and artists: Aubrey Beardsley, Katherine Bradley and Edith Cooper (Michael Field), John Gray, Charles Ricketts, Charles Shannon, and Oscar Wilde are central figures of concern • Brings together important criticism from the fields of Victorian studies, queer theory, and Textual studies (postmodern approaches to bibliography, archives, etc) • Revises our conception of nineteenth-century print culture through both popular printing as well as the beautiful work of William Morris at the Kelmscott Press to differentiate heteronormative experiences from the queer book • Focuses on queer lives, their influence on book history and their contributions to the Revival of Printing, serving as a reassessment of print culture outside of heteronormative boundaries • Based on primary research that examined, in addition to the books being studied by accounting ledgers, correspondence, diaries, and contemporary criticism from the late-Victorian age Queer books, like LGBTQ+ people, adapt heteronormative structures and institutions to introduce space for discourses of queer desire. *Queer Books of Late-Victorian Print Culture* explores print culture adaptations of the material book, examining the works of Aubrey Beardsley, Michael Field, John

Gray, Charles Ricketts, Charles Shannon and Oscar Wilde. It closely analyses the material book, including the elements of binding, typography, paper, ink and illustration, and brings textual studies and queer theory into conversation with literary experiments in free verse, fairy tales and symbolist drama. King argues that queer authors and artists revised the Revival of Printing's ideals for their own diverse and unique desires, adapting new technological innovations in print culture. Their books created a community of like-minded aesthetes who challenged legal and representational discourses of same-sex desire with one of aesthetic sensuality.

Thomas K. B. Koo

Kim, H., & **Koo, T. K. B.** (2024). *The Impact of Generative AI on Syllabus Design and Learning. Journal of Marketing Education*, 0(0). DOI: [10.1177/02734753241299024](https://doi.org/10.1177/02734753241299024)

This research examines the impact of generative artificial intelligence (AI) on the perception of educational content quality, specifically by comparing AI-generated and human-generated course syllabi in marketing education. Results from four studies indicate a general preference for AI-generated syllabi, attributed to their greater perceived objectivity. This preference is more pronounced in conventional courses but diminishes in unconventional ones, suggesting that the unique aspects of these courses may reduce the advantages of generative AI. In addition, disclosing the AI authorship of syllabi significantly affects their perceived quality negatively, underscoring the impact of transparency on the acceptance of AI-generated educational materials. These findings highlight the potential of generative AI in educational content creation and its limitations in certain contexts. They offer valuable insights for enhancing educational practices and shaping policy decisions to enrich student experiences in the era of AI integration.

Kyung Young Lee

Chen Y., Sherren K., **Lee K.Y.**, McCay-Peet L., Xue S., **Smit M.** (2024). From theory to practice: insights and hurdles in collecting social media data for social science research. *Frontiers in Big Data*, 7, art. no. 137992. DOI: [10.3389/fdata.2024.1379921](https://doi.org/10.3389/fdata.2024.1379921)

Social media has profoundly changed our modes of self-expression, communication, and participation in public discourse, generating volumes of conversations and content that cover every aspect of our social lives. Social media platforms have thus become increasingly important as data sources to identify social trends and phenomena. In recent years, academics have steadily lost ground on access to social media data as technology companies have set more restrictions on Application Programming Interfaces (APIs) or entirely closed public APIs. This circumstance halts the work of many social scientists who have used such data to study issues of public good. We considered the viability of eight approaches for image-based social media data collection: data philanthropy organizations, data repositories, data donation, third-party data companies, homegrown tools, and various web scraping tools and scripts. This paper discusses the advantages and challenges of these approaches from literature and from the



authors' experience. We conclude the paper by discussing mechanisms for improving social media data collection that will enable this future frontier of social science research.

Li L., Song Y.H., Soliman M., **Lee K.Y.**, Yang S.-B., Lee M. (2024). Customers' Continued Adoption of Mobile Apps and Their Satisfaction with Restaurants: The Case of McDonald's Memoriam. *Pacific Asia Journal of the Association for Information Systems*, 16 (1), pp. 1 – 27. DOI:

**Background:** The major purpose of this research is to examine Contactless Technology (CT) users' post-adoption phenomena in the context of mobile apps (MA) run by a Quick Service Restaurant (QSR). It applies the Post-Adoption Model of Information System Continuance (PAMISC) to examine how QSR customers' technology anxiety (TA), confirmation of initial expectations, perceived usefulness (PU), and satisfaction with CT relate to their continued intention of use. Furthermore, the study investigates the relationship between customers' satisfaction with CT and their overall satisfaction with QSR. **Methods:** To test the research model, we collected survey data from 245 users of MA provided by McDonald's restaurants in the US, which are analyzed through Partial Least Square analysis using SmartPLS 4.0. **Results:** The theoretical relationships in the PAMISC hold true in the context of QSR's MA. Current QSR customers' TA is negatively associated with their perceived usefulness, but is not related to the degree of confirmation of using MA. Customers' continued intention of use and satisfaction with MA are positively related to overall satisfaction with QSR. **Conclusion:** Our study is among the first to provide empirical/practical evidence of the PAMISC in the context of IT-enabled hospitality services. It also extends the model in two important ways. First, the study examines the role of TA, an important personal trait relevant to individuals' use of QSR technology. Second, it highlights customers' satisfaction with firm-provided technology to improve their overall satisfaction with the firm in the context of QSRs. For practitioners, it is important for QSR managers to understand the impact of TA on customers' adoption of MA, so that they can design their MA with simpler interfaces and more human aspects. Managers should also make sure that MA is well-designed to satisfy customers' needs, which will then lead to those customers' overall satisfaction with the QSR.

Shin S.I., Han S., **Lee K.Y.**, Chang Y. (2024). Exploring the impact of paid over-the-top service and mobile network profiles in watching TV content on mobile devices. *Internet Research*. DOI: 10.1108/INTR-06-2023-0487

**Purpose:** The television (TV) content ecosystem has shifted from traditional broadcasting systems to dedicated content producers and over-the-top (OTT) services. However, less empirical effort has been paid to the actual behaviors of the mobile users who watch TV content when explaining the impact of OTT service and mobile network profiles in watching TV content. This study aims to investigate the impact of gratifications and attitude formed by mobile TV users on actual mobile TV watching behaviors, as well as the moderating impacts of paid OTT service subscriptions and mobile network profiles, based on gratification theory, cognition–affect–behavioral (CAB) framework, sunk cost effect and walled-garden effect.

**Design/methodology/approach:** This study employs the generalized linear model (GLM) with generalized estimating equations (GEE) to test hypothesized relationships. A total of 338 mobile phone users who have been watching TV content using a mobile phone participated in the survey. The moderating variables, 4 types of paid streaming platform subscriptions, were classified based on the walled gardens formed by mobile telecom services. **Findings:** The study's results revealed that obtained gratifications and opportunity constructs substantially influenced a mobile phone user's attitude and behaviors. Additionally, mobile network profiles and the degree of access to paid platform services played significant moderating roles in the relationship between users' attitudes and behavior. **Originality/value:** This research enriches the existing OTT service literature and is one of the pioneering studies investigating the walled-garden effect's role in mobile phone users' actual watching behaviors, offering valuable practical implications for the OTT platform providers.

[Tsui A., Lee K.Y., Gonzalez P., Yu B. \(2024\). Examining Customers' Intention of Continued Use and Cross-Buying on Internet-Only Banks. \*Asia Pacific Journal of Information Systems\*, 34 \(1\), pp. 114 – 149. DOI: 10.14329/apjis.2024.34.1.114](#)

Internet-only banks (IOB) refer to financial institutions which provide services entirely through online digital platforms without physical branches. Although IOBs have been around for over 26 years, there is still room for investigating what factors motivate customers to use them continuously and extensively. Therefore, this study aims to examine what factors lead to customers' intention of continued use and cross-buying on IOBs by extending the Post-Acceptance Model of IS Continuance (PAMISC). The result shows that perceived economic benefit and ongoing trust have significant relationships with the intention of continued use and that ongoing trust has significant direct and mediating (via intention of continued use) relationships with the intention of cross-buying. Also, personal innovativeness positively moderates the relationship between ongoing trust and the intention of cross-buying. This study sheds light on the literature on branchless financial services and PAMISC. IOB practitioners should revisit the effectiveness of customers' economic benefits to establish ongoing trust with customers.

[Shin S.I., Hall D., Lee K.Y., Han S. \(2024\). Exploring satisfaction with social networking sites through the lens of fan page visiting: uncertainty reduction and general systems theory perspective. \*Information Technology and People\*, 37 \(1\), pp. 399 – 421. DOI: 10.1108/ITP-12-2020-0897](#)

**Purpose:** The purpose of the current study is to examine a social network site (SNS) users' overall satisfaction with SNS use in conjunction with their fan page visiting activities. We examined overall satisfaction with SNS usage from the lens of people's perceptions acquired from the use of sub-components of SNS. **Design/methodology/approach:** The current study employed uncertainty reduction theory (URT) and general systems theory (GST) to examine antecedents affecting overall satisfaction with SNS use. Five constructs were adopted: interactive and passive uncertainty reduction strategies, perceived usefulness and continuance

visiting behavior, satisfaction, and perceived functional benefits. Using a web-based survey, we analyzed 200 SNS users who follow at least one company's fan page, utilizing seemingly unrelated regression models to test hypotheses empirically. Findings: Research findings reveal that uncertainty reduction strategies supported by URT are significantly associated with the perceived usefulness of a company's fan page. In turn, we found that perceived usefulness becomes a strong motivator to continuance visits to the fan page. The frequency of return visiting behaviors eventually accounts for overall satisfaction with SNS. Perceived functional benefits moderates the relationship between perceived usefulness and visiting behaviors significantly. Originality/value: The current study contributes to information systems (IS), electronic communication, and their adjacent academic disciplines in providing evidence, including (1) the impact of uncertainty reduction strategies on continuance visiting behaviors in the SNS context, (2) SNS functionalities influencing the relationship between people's belief and behavior, and (3) theoretical significant perceptual link between a sub-component and a whole.

**Lee, K., Sobhaeerooy, R., & Sheehan, L.** Navigating the Digital Transformation of Ocean Tourism Industries: Insights from the Literature and Industry Experts. *Information Technology & Tourism*. DOI: <https://doi.org/10.1007/s40558-024-00302-2>.

This research examines the impact of digital transformation on the ocean tourism industry through a systematic literature review (SLR) and key informant interviews. Specifically, it searched peer-reviewed journals published in 2014 ~ 2023 from six scholarly databases and identified 35 studies. The findings indicated that the selected studies investigated virtual reality, gaming, geographic information systems, Internet-of-Things, etc. as key digital technologies driving improved performances or positive responses from tourists, businesses, and the industry. The most studied sub-sectors are cruises, ecotourism, and expeditions, with 60% of the studies originating from Asia Pacific countries. A follow-up key informant interview focused on three areas: DT applications in ocean tourism, key performance indicators, and success factors for DT-enabled achievements. Based on two studies, future research agendas were proposed, including the exploration of new digital technologies, identification of new success factors, examination of understudied ocean tourism sectors, expansion of geographical reach, and adoption of mixed-method studies.

Justin McManus

**McManus J.F., Carvalho S.W., Aghakhani H.** (2024). Make Cause-Related Marketing Messages About Your Customers, Not the Brand How High-Integrity Brands Can Reduce Perceived Bragging about Charitable Donations. *Journal of Advertising Research*, 64 (4), pp. 501 – 514. DOI: [10.2501/JAR-2024-028](https://doi.org/10.2501/JAR-2024-028)

Prior research suggests that communicating cause-related marketing success risks being perceived by consumers as bragging (i.e., caring more about the brand's image than the cause). This research examines cause-related marketing messaging about making charitable donations.



Across three studies, the findings show that brands can mitigate the perception that they are bragging by attributing their charitable donations to their customers (versus the brand). While this beneficial effect only holds true for brands perceived as having high integrity, such brands can use it to hedge against being perceived as braggarts, thereby fostering trust and increasing future donation intentions.

## Philippe Mongeon

Kladakis A., **Mongeon P.**, Bloch C.W. (2024). Citation Elites in Polytheistic and Umbrella Disciplines: Patterns of Stratification and Concentration in Danish and British Science. *Minerva*, 62 (3), pp. 397 – 426. DOI: [10.1007/s11024-024-09521-7](https://doi.org/10.1007/s11024-024-09521-7)

The notion of science as a stratified system is clearly manifested in the markedly uneven distribution of productivity, rewards, resources, and recognition. Although previous studies have shown that institutional environments for conducting research differ significantly between national science systems, disciplines, and subfields, it remains to be shown whether any systematic variations and patterns in inequalities exist among researchers in different national and domain specific settings. This study investigates the positioning of citation elites as opposed to ‘ordinary’ researchers by way of examining three dimensions of concentration (accumulation of publications and citations, specialisation, and institutional concentration) in biology, economics and physics in Denmark and the UK. Across all three dimensions, we put Richard Whitley’s bipartite theory to the test, suggesting a nexus between the intellectual structure of a discipline and the configuration of its elite. The study draws on a dataset of researchers who published most of their publications in either physics, biology, or economics over the 1980–2018 period and with at least one publication in 2017–2018 while affiliated to either a British or a Danish university. We find higher degrees of concentration in the UK compared to Denmark, and that physics and biology respectively display the greatest and lowest degree of concentration. Similar patterns in disciplinary differences are observed in both countries, suggesting that concentration patterns are largely rooted in disciplinary cultures and merely amplified by the national context.

Hare M., Krause G., Macknight K., Bowman T.D., Costas R., **Mongeon P.** (2024). Do you cite what you tweet? Investigating the relationship between tweeting and citing research articles. *Quantitative Science Studies*, 5 (2), pp. 332 – 350. DOI: [10.1162/qss\\_a\\_00296](https://doi.org/10.1162/qss_a_00296)

The last decade of altmetrics research has demonstrated that altmetrics have a low to moderate correlation with citations, depending on the platform and the discipline, among other factors. Most past studies used academic works as their unit of analysis to determine whether the attention they received on Twitter was a good predictor of academic engagement. Our work revisits the relationship between tweets and citations where the tweet itself is the unit of analysis, and the question is to determine if, at the individual level, the act of tweeting an academic work can shed light on the likelihood of the act of citing that same work. We model this relationship by considering the research activity of the tweeter and its relationship to the

tweeted work. The results show that tweeters are more likely to cite works affiliated with their same institution, works published in journals in which they also have published, and works in which they hold authorship. It finds that the older the academic age of a tweeter the less likely they are to cite what they tweet, though there is a positive relationship between citations and the number of works they have published and references they have accumulated over time.

**Armagan Özbilge**

**Özbilge A., Hassini E., Parlar M. (2024). Optimal pricing and donation policy for fresh goods. *European Journal of Operational Research*, 312 (1), pp. 198 – 210. DOI: [10.1016/j.ejor.2023.06.020](https://doi.org/10.1016/j.ejor.2023.06.020)**

This paper studies a socially responsible food-retailer's operational planning problem for a continuously deteriorating inventory over two periods with the consideration of donation and quality-sensitive customers. Each year, millions of tonnes of food are wasted causing economic, environmental, and social misfortunes, while at the same time millions are undernourished. Besides expired items, edible foods are often deliberately disposed of to attract quality-sensitive consumers. We address this issue by presenting an optimization model that incorporates a retailer's corporate social responsibility act, in the form of charitable donations, and makes use of the internet of things (IoT)-enabled condition tracking technologies to accurately estimate the effective (true) quality of the goods and its impacts on consumer demand. We formulate a quality-dependent newsvendor problem (QDNP) to determine the stocking quantity and the regular price of the goods at the beginning of the selling season, and the second-period price and donation policy at the end of the first period. The optimal donation policy at the end of the first period depends on the quality (time to expiration), on-hand inventory, and donation reward. Moreover, for a given inventory level, expected food waste is always greater in the absence of donations. QDNP outperforms the no-donation model, particularly when the uncertainty is high and/or the length of the second period is short. Interestingly, the two models react to an increase in uncertainty oppositely: QDNP orders more to alleviate future shortages, whereas, no-donation policy orders less to avoid future disposal costs at the end of the selling season.

**Özbilge A., Hassini E., Parlar M. (2024). Perils and Merits of Cross-Channel Returns. *IEEE Transactions on Engineering Management*, 71, pp. 6257 – 6271. DOI: [10.1109/TEM.2023.3247340](https://doi.org/10.1109/TEM.2023.3247340)**

In this article, we study the impact of cross-channel returns on a bricks-and-clicks dual-channel retailer's overall profit, individual channel prices, and individual channel demand under two scenarios: 1) exogenous returns and 2) refund-dependent returns. Our study reveals a number of interesting results. For example, when channel substitutability is high, accepting online purchased returns in the bricks-and-mortar store is likely to drive the in-store price up, despite a drop in the offline demand due to the cannibalization effect. In general, firms should allow cross-channel returns when channel substitutability is high, return handling cost is low, and

self-channel returns are not hefty. Unlike the extant literature, we also see that bricks-and-mortar returns impact a multiple-channel retailer's optimal return policy. We are also able to verify that our main findings are fairly consistent under both exogenous and refund-dependent returns scenarios.

## Sherry Pictou

Guinto R., Holley K., **Pictou S.**, Tinirau R., Andree P., Clark J.K., Levkoe C.Z., Reeve B. (2024). Challenging power relations in food systems governance: A conversation about moving from inclusion to decolonization. *Journal of Agriculture, Food Systems, and Community Development*, 13 (2). DOI: 10.5304/jafscd.2024.132.009

This reflective essay explores power relations, with a particular focus on racialization, that flow through dominant forms of food systems governance, with an aim to create more participatory governance models. Four of the authors asked a group of five scholars, activists, and practitioners (also authors) who identify as Black, Indigenous or People of Color (BIPOC) to discuss during a conference session issues of Indigenous food sovereignty, decolonization, Whiteness, and inclusion in food systems governance. This paper presents and analyzes the content of the session, part of the 2021 Global Food Governance Conference. We reflect on common themes from the session and put forth recommendations: encouraging greater inclusion in existing forms of food systems governance, achieving decolonization through creating diverse new governance models, and addressing the deeper power structures that underpin the dominant food system itself. We also suggest a research agenda, with the "what" of the agenda unfolding from a process of agenda development that centers BIPOC scholarship. The frameworks offered by the panelists are a starting point, as more work is needed to move towards decolonizing food systems governance research. Finally, a collaborative agenda must attend to the inextricable links of food systems governance to other fundamental issues, such as the emerging field of planetary health.

Stiegman M., **Pictou S.** (2024). We Story the Land: Exploring Mi'kmaq food sovereignty, Indigenous law and treaty relations. *Journal of Peasant Studies*, 51 (2), pp. 294 – 317. DOI: 10.1080/03066150.2023.2223482

This article explores the relationship between Indigenous Food Sovereignty and the resurgence of Indigenous law through an examination of the Mi'kmaq concept of Netukulimk. We present a case study of L'sitkuk First Nation's exploration of the original spirit and intent of the eighteenth-century Peace and Friendship Treaties and their enactment of the Mi'kmaq always those treaties are anchored in, focusing on insights coming out of We Story the Land, our documentary film about L'sitkuk youth and their mentors on a canoe journey to reclaim a series of ancient routes leaving from the reserve to cross their traditional territory.

Fournier C., Rand J.R., **Pictou S.**, Murphy K., Martin D., Pride T., Amirault M., Cunsolo A., Doucette M., Sheppard D.-A., Benoit A.C., McMillan J., Sylliboy J. (2024). Indigenous community



engagement requirements for academic journals. *AlterNative*, 20 (1), pp. 243 – 249 DOI: [10.1177/11771801241235051](https://doi.org/10.1177/11771801241235051)

This commentary emerged from an Indigenous research ethics and governance gathering and a scoping review completed by a diverse team of Indigenous and non-Indigenous scholars, which includes some of the co-authors of this article. A lack of detail regarding whether and how community engagement was carried out and reported in the context of published Indigenous health research in the Atlantic region of Canada were identified. This commentary builds on this work as well as other published works that emphasize the need to further ensure that Indigenous research is community based if not community led. Moreover, this commentary lends support to important changes to journal submission requirements regarding Indigenous health research submissions recently made at the Canadian Journal of Public Health through the work of Senior Editor Dr Janet Smylie and colleagues.

Kevin Quigley

Quigley, k., Lowe, K., Moore, S., & Wolfe, B. (2024). *Seized by Uncertainty: The Markets, Media, and Special Interests That Shaped Canada's Response to COVID-19*. McGill-Queen's University Press. <https://doi.org/10.2307/jj.21996032>

The COVID-19 virus was responsible for the deaths of over thirty-five thousand Canadians in its first two years alone. Described as the biggest public health crisis of the century, it was an uncertain threat, which emerged within complex psychological, social, legal, administrative, and economic contexts.

*Seized by Uncertainty* explains how Canadian governments responded to that threat. Despite early warning signs, governments failed to appreciate the trade-offs required to respond to the pandemic. Their approach, at times intolerant of debate and ignorant of diversity, served the interests of some over others. Their response prioritized stability and containment, enabling four in ten people to work from home, disproportionately benefiting an educated middle class who profited further from soaring stock markets and housing prices. Mental health issues spiked, racialized people were much more likely to test positive for the virus, those in low-income sectors experienced unstable employment and lacked workplace safety protections, the lives of low-risk youth were in constant suspension, and residents of some care homes were virtually abandoned.

*Seized by Uncertainty* studies the pandemic response through the contexts in which it emerged, exposing uncomfortable truths about a fragmented society and governance problems that predated the threat.

David Roach

Roach, David. (2024). *The Innovation Approach: Overcoming the Limitations of Design Thinking and the Lean Startup*. Emerald Group Publishing

Innovation and entrepreneurship have always had a strong and synergistic relationship. While Design Thinking and the Lean Startup have emerged as popular methodologies for managing innovation and entrepreneurial endeavours, the time is ripe for a rethinking of the innovation approach by going back to core principles.

By considering the strengths and weaknesses of Design Thinking and the Lean Startup within their respective contexts, expert David C. Roach revisits the fundamentals of innovation management. Addressing the cultural gap between STEM and business perspectives, Roach emphasizes the importance of managing the front-end of innovation, where the most critical decisions are made, and concepts shaped. Demonstrating how Design Thinking's enthusiasm for observational research can be particularly useful, while the Lean Startup's passion for hypothesis-driven minimum viable product (MVP) testing is a clear strength, Roach argues that the success of innovation depends on a robust concept coupled with a realistic business model.

Ryman J.A., **Roach D.C.** (2024). Innovation, effectuation, and uncertainty. *Innovation: Organization and Management*, 26 (2), pp. 328 – 348. DOI: [10.1080/14479338.2022.2117816](https://doi.org/10.1080/14479338.2022.2117816)

Innovation theory clearly differentiates between innovation processes and entrepreneurial processes through its distinction between uncertainty and risk. The authors' premise is that innovation and entrepreneurship are interdependent, where the role of the innovator is to reduce uncertainty, while the role of the entrepreneur is to manage uncertainty to a point where risk can be assessed. Taking an effectual innovation approach, innovation is modelled as uncertainty management requiring experimentation and flexibility, while entrepreneurial risk management is modelled as pre-commitments and affordable loss. Using data from the innovation processes of 169 US SMEs, the authors propose and test an exploratory empirical model which distinguishes uncertainty from risk and its impact on innovation and firm performance. The authors contend that once uncertainty and risk management aspects are isolated, their relationship to innovation performance can be investigated. The results indicate that uncertainty management does positively impact innovation performance, while a risk management approach impacts firm performance. Our model suggests that it may be helpful to segregate uncertainty and risk at the entrepreneurship–innovation interface.

Jeffrey Roy

**Roy J.** (2024). Digital Transformation Versus Westminster Traditionalism: Mindset, Mechanisms and Critical Enablers of Systemic Adaptation. *Canadian Public Administration*. DOI: [10.1111/capa.12598](https://doi.org/10.1111/capa.12598)

Since its inception, digital government has been a struggle between transformational aspirations and contested reforms grounded within a traditionalist governance ethos. Following a conceptual situating of such tensions, we focus on three interrelated thematic sets of digital governance reforms: i) organizational governance and enterprise architecture; ii) COVID-19 and hybrid work arrangements; and iii) the escalating risks and complexities of cybersecurity. This article argues that the pervasiveness of traditional Westminster principles—notably

information secrecy and hierarchical control—has shackled the emergence of an alternative governance ethos more aligned with digital innovation and systemic openness. In order to forge the latter, three critical enablers of systemic transformation must be embraced: first, a more collaborative and open political mindset; second, an alternative governance architecture championed by a new organizational entity; and third, the forging of a more diverse and empowered public service to strengthen digital governance adaptation and anticipatory capacities.

Lorn Sheehan

Presenza A., Lucia M.D., **Sheehan L.** (2024). The orchestrator and its role in the birth and development of a niche-tourism ecosystem. *Sinergie*, 42 (2), pp. 139 – 16. DOI: [10.7433/s124.2024.07](https://doi.org/10.7433/s124.2024.07)

Frame of the research: Oleotourism, an emerging opportunity for rural diversification, is thriving in Mediterranean regions. This niche caters to the rising demand for authentic tourism products and creative experiences that enhance agricultural livelihoods. Purpose of the paper: The paper explores characteristics and activities of facilitator-orchestrator organizations that further the growth and development of niche-tourism ecosystems. Methodology: Primary and secondary data were collected from the case study of the oleotourism niche in Italy. In particular, the Italian National Association of Oil Cities has been selected as the case study due to its preeminent work in supporting the birth and development of oleotourism in Italy. Findings: The analysis reveals the facilitator-orchestrator role played in developing the oleotourism ecosystem. Findings unveil three orchestrator characteristics (embeddedness, agility, and capability) and six activities (lobbying, participant recruitment and engagement, regulation, research and development, capacity building, and promotion). Findings support the growth of oleotourism stakeholders and develop the oleotourism business ecosystem. Research limits: The paper analyses only a single case study and examines only the orchestrator's perspective. Practical implications: This study supports practitioners as well as policymakers in several ways. It offers implementation mechanisms to support a fragile and fragmented niche-tourism ecosystem. It also highlights possible obstacles to overcome. Originality of the paper: Oleotourism is a topic of particular interest to advance cultural and creative industries as drivers for local tourism development and innovation. However, it reveals a fragile ecosystem composed of a plethora of stakeholders and proposals that are still in an infant stage. Unveiling the main orchestration mechanisms that support the development of such an ecosystem is of great importance in boosting the sustainable growth of the oleotourism business ecosystem.

**Botero, C., Sheehan, L., and Cordero, R.** 2024. From beauty to management: assessment of coastal scenery on Nova Scotian beaches as a guide for better decision making. *Journal of Coastal Research*. Vol.113: 21-27

Coastal management is an integrated form of decision-making that considers a wide variety of social uses and economic activities on the maremtory. The ecosystems of coastal areas may be



classified into three groups: sandy, rocky, and flooded. The Coastal Scenery Evaluation System (CSES) measures the beauty of a defined coastal area based on an assessment of 18 natural and 8 human parameters, which are integrated in a fuzzy logic model to obtain an overall value that represents the level of scenic appeal which then falls into one of five rank-ordered classes. During the summer of 2023, 149 beaches in the province of Nova Scotia, Canada, were assessed using the CSES technique. Sampling occurred over 25 days and involved 6997 kilometers of field trips. The results reveal a coastline dominated by rural (51%; n=76) and village beaches (24%; n=36), with very few urban (1%; n=2) and resort (1%; n=2) beaches. Almost half of the beaches were located within recreational (40%; n=60) and natural (5%; n=7) parks. Access to some beaches in Canada is challenging because they border private lands (beginning above the high-water mark) where the owners can restrict access to the shoreline. In terms of coastal scenery values, almost one-third of beaches were categorized as “high natural” and “natural” (11% Class I and 19% Class II, respectively), 42% were categorized as light and intensive development beaches (32% Class IV and 11% Class V, respectively), and 28% were categorized as medium landscape value (Class III). Based on these results, an additional classification was conducted to identify those beaches that require an ecosystem management approach, those with recreational management requirements, and those with tourism potential. Special attention was devoted to Class III beaches, as they have equal possibilities to be either better preserved and be upgraded to Class II, or to be further developed and be downgraded to Class IV. The research demonstrates the utility of the CSES technique, not only to classify beaches based on their beauty, but also as a coastal management tool to provide insightful information that improves the decision-making process in multiple coastal areas.

## Mike Smit

Hughes B., Martin-Misener R., Latimer M., **Smit M.**, McGrath P., Campbell-Yeo M. (2024). Parenting pain away: Quasi-experimental study of an eHealth learning platform to evaluate acceptability, feasibility, and utilisation of parent-led pain management. *Scandinavian Journal of Caring Sciences*, 38 (4), pp. 960 – 972 DOI: 10.1111/scs.1329

**Aim:** To evaluate the impact of an eHealth educational resource about infant procedural pain management, given during the prenatal period, on feasibility, acceptability, knowledge, self-efficacy, and involvement. **Background:** Routine health care requires newborns to have painful procedures (e.g., intramuscular injection). The impacts of untreated pain in neonates are widely recognised but adoption of effective procedural pain management strategies in clinical practice varies. There is clear evidence supporting the effectiveness of parent-led pain management during procedures (e.g., skin-to-skin care) and reputable resources to raise awareness among parents are warranted. Our team co-created Parenting Pain Away, a website to equip parents with evidence to assist with managing the pain of procedures and empower them to be involved. **Methods:** A quasi-experimental evaluation using a pre/post intervention design with low-risk expectant parents. **Results:** Of the 41 participants, before intervention exposure participants were familiar or had used skin-to-skin care (n = 33), breastfeeding (n = 30) and

sucrose (n = 13) as pain management. Most participants (n = 38) desired more information on how to be involved. Providing access to Parenting Pain Away during pregnancy was supported and participants ranked the website above average using the System Usability Scale. Parenting Pain Away did not have a statistically significant influence on outcomes. Participants reported variation in clinical support with parent-led pain management. Conclusion: A multifaceted approach is recommended to maintain infant procedural pain management. Implications for the Profession and Patient Care: Equipping parents with knowledge related to infant pain management using an eHealth approach satisfied their information desires. The study findings are important considerations for perinatal care providers, policy makers, and families to finally achieve adequate procedural pain management. Reporting Method: This study used the STROBE checklist, adhering to EQUATOR guidelines. Patient and Public Contribution: A stakeholder group (expectant parents, parents, perinatal researchers, clinicians, and administrators) was created to inform the study design and intervention.

Sherren K., Chen Y., Mohammadi M., Zhao Q., Gone K.P., Rahman H.M.T., **Smit M.** (2024). Social media and social impact assessment: Evolving methods in a shifting context. *Current Sociology*, 72 (4), pp. 629 – 648 DOI: [10.1177/00113921231203179](https://doi.org/10.1177/00113921231203179)

Among many by-products of Web 2.0 come the wide range of potential image and text datasets within social media and content sharing platforms that speak of how people live, what they do, and what they care about. These datasets are imperfect and biased in many ways, but those flaws make them complementary to data derived from conventional social science methods and thus potentially useful for triangulation in complex decision-making contexts. Yet the online environment is highly mutable, and so the datasets are less reliable than censuses or other standard data types leveraged in social impact assessment. Over the past decade, we have innovated numerous methods for deploying Instagram datasets in investigating management or development alternatives. This article synthesizes work from three Canadian decision contexts – hydroelectric dam construction or removal; dyke realignment or wetland restoration; and integrating renewable energy into vineyard landscapes – to illustrate some of the methods we have applied to social impact assessment questions using Instagram that may be transferrable to other social media platforms and contexts: thematic (manual coding, machine vision, natural language processing/sentiment analysis, statistical analysis), spatial (hotspot mapping, cultural ecosystem modeling), and visual (word clouds, saliency mapping, collage). We conclude with a set of cautions and next steps for the domain.

Margeson K., Manuel P., Stewart I., Murphy E., **Smit M.**, Sherren K. (2024). The Role of Social License in Non-Industrial Marine and Coastal Planning: a Scoping Review. *Environmental Management*, 73 (3), pp. 595 – 613. DOI: [10.1007/s00267-023-01921-x](https://doi.org/10.1007/s00267-023-01921-x)

Marine and coastal environments are diverse and dynamic, supporting competing human interests and demands. As society seeks to balance contested uses of space, more holistic planning processes have emerged, which consider social, economic, and ecological factors. One approach that considers social factors, and more specifically social acceptance, is “social license

to operate” (SLO). Originating in the terrestrial mining industry, SLO has been adopted by various marine industries. Except for some emerging work in the conservation field, SLO is typically applied to industrial marine and coastal contexts. To understand SLO’s uses in other marine and coastal planning contexts, namely conservation, adaptation, and restoration, we conducted a scoping review using the term SLO and similar concepts, including public or social acceptance, support, and buy-in. Results indicate the concept of SLO is still emerging in non-industrial marine and coastal planning, with an emphasis on gaining public acceptance rather than maintaining it. The concept of SLO was applied broadly, including as a measurement for public support and a product of effective engagement. Most publications focused on barriers and drivers of SLO. Influential factors are identified and organized by theme, then discussed based on their relationships within a social-ecological system framework. Considering the common factors and their associated systems helps to link elements necessary to obtain SLO, highlighting their interconnectedness with each other, society, and the natural environment. The findings of this review illustrate SLO’s utility for academics and practitioners alike, through its application in methods, tools, values, and concepts that characterize public inclusion for marine and coastal planning.

**Binod Sundararajan**

[Williams K.A., Baidoo L., Walker T.R., \*\*Sundararajan B.\*\*, Davis A. \(2024\). The Quest for Impact Research: Position, Strategies and Future Directions. \*World Sustainability Series\*, Part F2523, pp. 109 – 128. DOI: 10.1007/978-3-031-55996-9\\_8](#)

There is an urgent global call for sustainable development (SD) action to meet the United Nations 2030 Agenda. Business schools play a significant role in facilitating engagement and enabling action on the global commitment for impact. Such institutions strive for responsible and meaningful impact by fostering the sustainable development goal (SDG) commitments, where research is a core element of this impact lexicon. However, research commitments in business schools are challenged by the pressures of academic life and its progressions that scholars face, often hindering pathways towards impact research. As an interdisciplinary group of researchers embarking on a major research project focused on SD, this positional paper considers why impact research is important, what impact research is, and how we as researchers can ensure we best do impact research that is embedded in purposeful shared partnerships and collaborations. To continue the impact research dialogue and enable other researchers, we share strategic pathways and community considerations for conducting impact research that can be applied, measured, and put into action towards the SDGs and the 2030 Agenda.

**Oumar Sy**

[Diedhiou S.O., Wade C., \*\*Sy O.\*\*, Margetic C. \(2024\). Location and role of food markets in local development in ziguinchor, senegal \[localisation et rôle des marchés alimentaires dans le développement local de ziguinchor au sénégal\]. \*BSGLg\*, 83 \(2\), pp. 103 - 118](#)



This article describes the geography of fresh produce markets, mainly vegetables, in a secondary African town (Ziguinchor), and the distribution and supply to the town. Three scales are used: the urban space (market) and peri-urban space (urban agriculture), the agricultural region (Casamance) and imports (Dakar). The aim is to show the role of local markets in urban areas in promoting local consumption of vegetables through short circuits and close links between farmers and consumers. This socio-spatial network of places and players (farmers, greengrocers, consumers, local authorities) ensures the supply of a rapidly growing city. The methodology is based on quantitative and qualitative work. Using this method, 841 vegetable vendors were inventoried in five major markets in the city of Ziguinchor. The results show that the distribution function of central markets is being strengthened by the emergence of neighbourhood markets on the outskirts of the city, thereby contributing to the city's socioeconomic development as a basic and local service.

Samantha Taylor

**Taylor S., Barnard K., McGregor J., Rafuse A. (2024).** Deloitte Canada's Cocreated ICT Simulation for Advanced Accounting. *Journal of Emerging Technologies in Accounting*, 21 (1), pp. 191 – 202. DOI: [10.2308/JETA-2022-020](https://doi.org/10.2308/JETA-2022-020)

In business, shift happens fast. Consequently, the accounting profession, including students, must adapt early and often. Fortunately, students reported improved learning and satisfaction through interactive professional learning experiences (Riley, Eldridge, and Venkatesh 2021). This study introduces a cocreated simulation between our university and Deloitte Canada, a professional services firm. A partnership of academics, auditors, and consultants yielded this information communications technology (ICT) business combination simulation for an advanced financial accounting course. Our simulation aimed to empower learners to focus on communicating technical accounting solutions in a professional environment. We also provided a video simulation, solution, and assessment rubric.

M. Ali Ülkü

**Toktaş D., Ülkü M.A., Habib M.A. (2024).** Toward Greener Supply Chains by Decarbonizing City Logistics: A Systematic Literature Review and Research Pathways. *Sustainability (Switzerland)*, 16 (17), art. no. 7516 DOI: [10.3390/su16177516](https://doi.org/10.3390/su16177516)

The impacts of climate change (CC) are intensifying and becoming more widespread. Greenhouse gas emissions (GHGs) significantly contribute to CC and are primarily generated by transportation—a dominant segment of supply chains. City logistics is responsible for a significant portion of GHGs, as conventional vehicles are the primary mode of transportation in logistical operations. Nonetheless, city logistics is vital for urban areas' economy and quality of life. Therefore, decarbonizing city logistics (DCL) is crucial to promote green cities and sustainable urban living and mitigate the impacts of CC. However, sustainability encompasses the environment, economy, society, and culture, collectively called the quadruple bottom line (QBL) pillars of sustainability. This research uses the QBL approach to review the extant

literature on DCL. We searched for articles on SCOPUS, focusing on analytical scholarly studies published in the past two decades. By analyzing publication years, journals, countries, and keyword occurrences, we present an overview of the current state of DCL research. Additionally, we examine the methods and proposals outlined in the reviewed articles, along with the QBL aspects they address. Finally, we discuss the evolution of DCL research and provide directions for future research. The results indicate that optimization is the predominant solution approach among the analytical papers in the DCL literature. Our analysis reveals a lack of consideration for the cultural aspect of QBL, which is essential for the applicability of any proposed solution. We also note the integration of innovative solutions, such as crowdsourcing, electric and hydrogen vehicles, and drones in city logistics, indicating a promising research area that can contribute to developing sustainable cities and mitigating CC.

[Oguntola I.O., Ülkü M.A., Saif A., Engau A. \(2024\). On the value of shipment consolidation and machine learning techniques for the optimal design of a multimodal logistics network. \*INFOR\*, 62 \(1\), pp. 1 – 52. DOI: 10.1080/03155986.2023.2202079](#)

We study a multimodal logistics network for a multi-echelon supply chain (SC) with multiple products, considering economic and environmental sustainability and shipment consolidation (ShC). The SC logistics network is modelled as a Mixed Integer Linear Program (MILP) and then tested on randomly generated but realistic test instances. The effects of ShC in SC network design on economic and environmental costs are analyzed, showing that consolidation decreases the SC cost, especially when the distance between the shipper and receiver is significant. Moreover, machine learning (ML) approaches for predicting stochastic parameters using historical data are evaluated compared to the more traditional stochastic programming approaches over multiple prediction periods. The three ML models utilized; namely, Attention CNN-LSTM, Attention ConvLSTM and an ensemble of both models using Support Vector Regression, performed significantly better than the stochastic programming approaches considered (simple recourse and chance-constrained) in all scenarios. The numerical examples show that the MILP models using the predictions from the ML algorithms provide the highest value of the stochastic solution and the lowest expected value of perfect information. This study makes a case for the continued integration of ML prediction methodologies into stochastic optimization modelling in the setting of sustainable SC logistics design problems. © 2023 Canadian Operational Research Society (CORS).

[Ülkü M.A., Bookbinder J.H., Yun N.Y. \(2024\). Leveraging Industry 4.0 Technologies for Sustainable Humanitarian Supply Chains: Evidence from the Extant Literature. \*Sustainability \(Switzerland\)\*, 16 \(3\), art. no. 132. DOI: 10.3390/su16031321](#)

Prevailing and exacerbating impacts of climate change call for robust and resilient humanitarian supply chains (HSCs). To that end, intelligent technologies that brought about the Industry 4.0 (I4.0) revolution, such as the Internet of Things, blockchain, and artificial intelligence, may tremendously impact the optimal design and effective management of HSCs. In this paper, we conduct a systematic literature network analysis and identify trends in I4.0 and HSCs. We posit

the need to instill into current HSC efforts the quadruple bottom-line (cultural, economic, environmental, and social) pillars of sustainability and define a Sustainable Humanitarian Supply Chain (SHSC). Based on the extant literature and ongoing practice, we highlight how I4.0 technologies can aid SHSC stages from disaster risk assessment to preparedness to response to relief. The complex nature of SHSCs requires a holistic and multidisciplinary approach and collaboration by scholars, policymakers, and industry practitioners to pool solution resources. We offer future research venues in this fledgling but life-saving scientific discipline. SHSCs can be empowered with I4.0 technologies, a much needed direction in our climate-changed world.

[Amegboleza A.A., Acakpovi A., Ülkü M.A. \(2024\). Project management challenges in client-consultant decision-making: A case for the Ghanaian mining construction industry. \*Canadian Journal of Administrative Sciences\*. DOI: 10.1002/cjas.1772](#)

This study explores the complex decision-making (DM) dynamics between clients and consultants, a crucial area often neglected in existing research. Utilizing a Multi-Perspective Approach combined with Multi-Criteria Decision Analysis, we examine DM challenges such as cost overruns, project delays, and compromised work quality stemming from ineffective DM practices. Key findings highlight the pervasive fear of financial repercussions from poor decisions, which impedes decisive and transparent DM. We offer practical recommendations for managers, propose strategies to strengthen DM processes, enhance project execution frameworks and insights to improve operational efficiency and competitive advantages for Ghanaian mining construction sector stakeholders. This study significantly contributes to the literature on project management by offering targeted solutions and advancing knowledge on DM practices.

[Ülkü M.A., Mansouri B. \(2024\). Supply chain analytics: Overview, emerging issues, and research outlook. \*The Palgrave Handbook of Supply Chain Management\*, pp. 1275 – 1299. DOI: 10.1007/978-3-031-19884-7\\_80](#)

Supply chains (SCs) produce vast amounts of data from sourcing raw materials to manufacturing to consumption to returns. Supply chain analytics (SCA) helps organizations (profit or non-profit) to make faster, smarter, and more effective and efficient decisions. However, SCA requires advanced technology adoption, an organizational skill set, and a culture that embraces data-driven decision-making. In contemporary SC operations, a highly sought-after approach, analytics provides description, prediction, and prescription of the problems faced. Emerging intelligent technologies, such as the internet of things, blockchain, physical internet, and artificial intelligence that support SCA, can be utilized in almost every sector, including humanitarian and business logistics, procurement, marketing, pricing, and sustainable supply chain management. This chapter overviews the scaffolding concepts behind SCA. It offers a framework for bringing various stages of an SC to collaborate in data sharing, planning, and executing SC decisions at the operational, tactical, and strategic levels. It offers findings and managerial implications from the state-of-the-art literature and best industrial practices while focusing on SCA's current concerns and research opportunities.



ElMenshawy O.M., Ülkü M.A., Hsuan J. (2024). Navigating Green Ship Recycling: A Systematic Review and Implications for Circularity and Sustainable Development. *Sustainability (Switzerland)*, 16 (17), art. no. 7407. DOI: [10.3390/su16177407](https://doi.org/10.3390/su16177407)

The shipping industry is the cornerstone that facilitates the movement of approximately 90% of international commercial goods. However, environmental challenges, particularly in the ship recycling (SR) industry, have become increasingly evident. Via closed-loop production patterns within an economic system, a circular economy aims to improve resource-use efficiency by focusing on urban and industrial waste to achieve better balance and harmony between the economy, environment, and society. A key element in this process is a well-executed disassembly that enables reuse, remanufacturing, high-value recycling, and implementing other circular strategies. Based on a systematic literature review, this paper delineates the SR process, identifies influential scholarly works on recycling end-of-life ships, discusses factors affecting shipowners' decision to recycle, and opportunities for sustainability and circularity in SR processes. The results confirm the increasing need for green SR to reduce shipbreaking waste. Also discussed is how greening SR could be integrated into sustainable development goals under proper environmental and safety regulations and an aligned cultural mindset for stakeholders.

Parmaksız D., Ülkü M.A., Weigand H. (2024). Investigating Rural Logistics and Transportation through the Lens of Quadruple Bottom Line Sustainability. *Logistics*, 8 (3), art. no. 81. DOI: [10.3390/logistics8030081](https://doi.org/10.3390/logistics8030081)

Background: An alternative to unsustainable urban developments, rural living is on the rise, but it already has its challenges. To that end, rural logistics and transportation (RLT) calls for a comprehensive analysis of its context, especially in a climate-changed and socially turbulent world. Unlike urban logistics, there is limited focus on RLT in academic literature. However, rural areas' lack of transportation and limited logistics operations negatively affect rural residents' daily lives, especially socially disadvantaged groups such as older people, children, women, and low-income households. Methods: This study first identifies the key literature on RLT and sustainability using a systematic literature review. Then, it synthesizes from the extant literature the challenges in RLT and proposed solutions to understand how to improve accessibility and address some barriers to implementation, all through the perspective of quadruple bottom line (QBL) sustainability pillars. Results: The lack of opportunities presented to rural residents due to limited RLT leads to inequality between rural and urban populations, requiring academic attention. Moreover, despite the growing emphasis on sustainability in academic literature, there is a noticeable lack of attention to sustainability in RLT. Conclusions: This study leads policymakers toward a better understanding of rural communities' complexities, directs practitioners to adopt the QBL perspective in decision-making, and aims to stipulate innovative RLT topics for further research for academicians.

Sabbaghnia A., Heydari J., Ülkü M.A., Zolfaghari S. (2024). Sustainable supply chain coordination: extant literature, trends, and future research directions. *Annals of Operations Research*. DOI: 10.1007/s10479-024-05852-6

Sustainability has garnered significant attention from both academia and practice in recent decades. While the term "sustainable supply chain" (SSC) was uncommon in the early 2000s, there has been a surge in literature on SSC since 2010. This study aims to review critical concepts of sustainable supply chain coordination (SSCC) problems, identify research gaps, and highlight main research streams and future directions. Recent studies in SSCC can be categorized into five areas: (1) consumer environmental awareness, (2) corporate social responsibility, (3) carbon legislation, (4) coordination of reverse and closed-loop supply chains, and (5) governmental intervention in SSCC. The existing literature is analyzed and evaluated based on the triple bottom line of sustainability to provide a comprehensive critical survey of the problem. While the existing literature primarily focuses on the economic aspect of sustainability, current review of SSCC drivers and barriers reveals an increasing trend in the application of different coordination mechanisms and contracts. Such strategies aim to enhance supply chain profitability while promoting environmental and social performance improvement. This review presents an up-to-date overview of recent progresses, emerging trends, and research gaps in the area of SSCC. Finally, it explores future research avenues by focusing on emerging topics, novel theoretical approaches, and multidisciplinary perspectives.

Heidi Weigand

Weigand H., Williams K.S., Okoroafor S., Weigand E., Liuzzo G. (2024). Does kindness matter? Discourses on kindness during the pandemic. *Qualitative Research in Organizations and Management*, 19 (4), pp. 229 – 255. DOI: 10.1108/QROM-12-2023-2640

**Purpose:** Our research takes inspiration from stories of kindness in the context of the COVID-19 global pandemic and investigates what generational entrants, namely those entering the workforce in large numbers, dubbed emerging leaders (ages 19–39) think of the phenomenon of kindness and its potential role in organizations. Guiding the study is the question: “What can emerging leaders tell us about kindness and work?” **Design/methodology/approach:** Adopting discourse analysis fused with kindness as research praxis, we conducted 66 qualitative interviews with young leaders (born between 1981 and 2001) across North America, Europe and Africa. Interviews were conducted in the summer and fall of 2020. **Findings:** Our research sets out to expand theorizing related to kindness as a phenomenon, illustrates implications relevant to management and organizational studies and offers insights into the value of kindness as research praxis. This paper makes three related contributions and one methodological one: (1) it contributes to the literature on kindness and how it can be theorized in management and organizational studies, (2) it explores emerging leaders perceptions of kindness in a pandemic context, (3) it offers insights into how kindness might be leveraged as a model of moral and ethical behaviour valued in organizational environments, and (4) the paper promotes epistemic properties of kindness when fused with research praxis. **Originality/value:**

Authored during a rapidly unfolding scholarly conversation on the influences of the pandemic on organizational life, our research draws insights from experiences of kindness during COVID-19. This paper applies discourse analysis fused with kindness as research praxis to an understudied area of human behaviour (kindness) which has implications for management and organizational theory and practice. These implications include: (1) individual kindness capacity or inclination towards kindness behaviour that may be depleted by stressors such as the pandemic, (2) that kindness has socially contagious qualities, (3) and kindness as praxis has material benefits in the context of research methods, benefiting the research team and the research outputs.

Winham N., Williams K.S., Jamjoom L.A., Watson K., **Weigand H.**, Deal N.M. (2024). Creating good knowledge together: heartfelt-communal storytelling at the intersection of caregiving and academia. *Equality, Diversity and Inclusion*, 43 (5), pp. 764 – 783. DOI: [10.1108/EDI-08-2022-0207](https://doi.org/10.1108/EDI-08-2022-0207)

**Purpose:** The purpose of this paper is to explore a novel storytelling approach that investigates lived experience at the intersection of motherhood/caregiving and Ph.D. pursuits. The paper contributes to the feminist tradition of writing differently through the process of care that emerges from shared stories. **Design/methodology/approach:** Using a process called heartfelt-communal storytelling, the authors evoke personal and embodied stories and transgressive narratives. The authors present a composite process drawing on heartfelt-autoethnography, dialogic writing and communal storytelling. **Findings:** The paper makes two key contributions: (1) the paper illustrates a novel feminist process in action and (2) the paper contributes six discrete stories of lived experience at the intersection of parenthood and Ph.D. studies. The paper also contributes to the development of the feminist tradition of writing differently. Three themes emerged through the storytelling experience, and these include (1) creating boundaries and transgressing boundaries, (2) giving and receiving care and (3) neoliberal conformity and resistance. These themes, like the stories, also became entangled. **Originality/value:** The paper demonstrates how heartfelt-communal storytelling can lead to individual and collective meaning making. While the Ph.D. is a solitary path, the authors' heartfelt-communal storytelling experience teaches that holding it separate from other relationships can impoverish what is learnt and constrain the production of good knowledge; the epistemic properties of care became self-evident.

Hartt C.M., **Weigand H.**, MacDonald A.J., **Barker J.R.**, MacKinnon N.J. (2024). Pharmacists' perceptions of error reporting systems. *Journal of Patient Safety and Risk Management*, 29 (6), pp. 268 – 273. DOI: [10.1177/25160435241288287](https://doi.org/10.1177/25160435241288287)

**Background:** Healthcare-related adverse events directly impact patient safety. Effective reporting of adverse events and workplace factors affecting the quality and quantity of reporting has been a recent focus. In Nova Scotia, pharmacists have been required to report quality-related events (QREs), errors, and near misses since 2010 through the Canadian Pharmacy Incident Reporting (CPhIR) database. This study aims to better understand how

healthcare professionals who use the CPhIR system feel about their experience with QREs and the QRE reporting process. Methods: A total of 1000 registered pharmacists and staff were contacted through the Nova Scotia College of Pharmacists. Five focus group meetings were conducted from May to October 2018, consisting of 17 community pharmacists, pharmacy technicians, and assistants. Analysis: Thematic analysis was used to identify and define emerging themes in the transcripts by multiple readers. The Actor-Network Analytical Theory helped draw a web of connections in producing a safety culture that extends beyond the roles at the dispensing counter. Results: It was found that participants were committed to minimizing and reporting errors, but using the CPhIR database system is both time-consuming and onerous. Additionally, there was a lack of continuity in communicating the QRE system protocols and compliance protocols for the system. Conclusions: Community-based pharmacy culture needs to shift from a compliance-based culture, where error reporting is based on completion and volume, to a just culture that embraces quality and learning from mistakes, a critical element of safe dispensing.

### Alexandria West

**West A.L.,** Naeimi H., Di Bartolomeo A.A., Yampolsky M., Muise A. (2024). Growing Together Through Our Cultural Differences: Self-Expansion in Intercultural Romantic Relationships. *Personality and Social Psychology Bulletin*, 50 (2), pp. 182 – 199. DOI:10.1177/01461672221121508

Intercultural romantic relationships are increasingly common and although the obstacles such couples face are well documented, the factors that facilitate their success are less studied. Although cultural differences may present challenges, they also offer opportunities for self-expansion—personal growth via new perspectives, knowledge, and identities. In three studies using cross-sectional, dyadic, longitudinal, and experimental methods (N<sub>Total</sub> = 896), self-expansion was associated with relationship quality and identity outcomes (i.e., identity integration, cultural self-awareness). Self-expanding through a partner's culture (i.e., cultural self-expansion) was uniquely related to identity outcomes, beyond self-expanding more generally (relational self-expansion). Furthermore, actively sharing cultures and discussing their differences were linked to greater cultural and relational self-expansion, which in turn differentially predicted partners' relationship quality and cultural identities. These studies provide a first look at the role of self-expansion in intercultural relationships, demonstrating that the way couples negotiate their cultures is linked to both relational and personal outcomes.

**Naeimi H., West A.L.,** Muise A., Johnson M.D., Impett E.A. (2024). Through the cultural looking glass: Diversity ideologies and cultural sharing in intercultural romantic relationships. *Journal of Social and Personal Relationships*, 41 (1), pp. 247 – 273. DOI: 10.1177/02654075231208727

Intercultural romantic relationships are increasingly common. While past work has focused on how satisfied intercultural couples are compared to monocultural couples, we focus on factors



within intercultural relationships that predict partners' relationship quality. We propose that diversity ideologies—people's beliefs about cultural diversity—are one set of factors that influence communication about cultural differences and relationship quality. Across two cross-sectional studies of individuals and one longitudinal study of couples in intercultural relationships ( $N_{\text{total}} = 838$ ), we found that people who endorsed colorblindness—ignored cultural differences—expressed their own culture more but accepted their partner's culture less in the relationship, in turn experiencing mixed relational outcomes. However, participants who endorsed multiculturalism—acknowledged cultural differences and aimed to preserve cultures as distinct—or polyculturalism—recognized cultural differences and viewed cultures as interconnected—expressed their own culture and accepted their partner's culture more and in turn experienced higher relationship quality. Our studies provide the first empirical examination of how diversity ideologies shape the way intercultural couples communicate about their cultural differences and subsequently impact their relationship quality.

W. Dominika Wranik

Takhar P., Geirnaert M., Gavura S., Beca J., Mercer R.E., Denburg A., Muñoz C., Tadrous M., Parmar A., Dionne F., Boehm D., Chambers C., Craig E., Trudeau M., Cheung M.C., Houlihan J., McDonald V., Pechlivanoglou P., Taylor M., Wasylenko E., **Wranik W.D.**, Chan K.K.W. (2024). Application of Multi-Criteria Decision Analysis (MCDA) to Prioritize Real-World Evidence Studies for Health Technology Management: Outcomes and Lessons Learned by the Canadian Real-World Evidence for Value of Cancer Drugs (CanREValue) Collaboration. *Current Oncology*, 31 (4), pp. 1876 – 1898. DOI: [10.3390/curroncol31040141](https://doi.org/10.3390/curroncol31040141)

Multi-criteria decision analysis (MCDA) is a value assessment tool designed to help support complex decision-making by incorporating multiple factors and perspectives in a transparent, structured approach. We developed an MCDA rating tool, consisting of seven criteria evaluating the importance and feasibility of conducting potential real-world evidence (RWE) studies aimed at addressing uncertainties stemming from initial cancer drug funding recommendations. In collaboration with the Canadian Agency for Drugs and Technologies in Health's Provincial Advisory Group, a validation exercise was conducted to further evaluate the application of the rating tool using RWE proposals varying in complexity. Through this exercise, we aimed to gain insight into consensus building and deliberation processes and to identify efficiencies in the application of the rating tool. An experienced facilitator led a multidisciplinary committee, consisting of 11 Canadian experts, through consensus building, deliberation, and prioritization. A total of nine RWE proposals were evaluated and prioritized as low ( $n = 4$ ), medium ( $n = 3$ ), or high ( $n = 2$ ) priority. Through an iterative process, efficiencies and recommendations to improve the rating tool and associated procedures were identified. The refined MCDA rating tool can help decision-makers prioritize important and feasible RWE studies for research and can enable the use of RWE for the life-cycle evaluation of cancer drugs.

Cheema Z.M., Gomez L.C., Johnson N., Laflamme O.D., Rabin H.R., Steele K., Wallenburg J., Leong J., Cheng S.Y., Quon B.S., Stephenson A.L., **Wranik W.D.**, Sadatsafavi M., Stanojevic S.

(2024). *Measuring the burden of cystic fibrosis: A scoping review*. *Journal of Cystic Fibrosis*, 23 (5), pp. 823 – 830 DOI: [10.1016/j.jcf.2023.11.014](https://doi.org/10.1016/j.jcf.2023.11.014)

Background: Cystic fibrosis (CF) contributes a significant economic burden on individuals, healthcare systems, and society. Understanding the economic impact of CF is crucial for planning resource allocation. Methods: We conducted a scoping review of literature published between 1990 and 2022 that reported the cost of illness, and/or economic burden of CF. Costs were adjusted for inflation and reported as United States dollars. Results: A total of 39 studies were included. Direct healthcare costs (e.g., medications, inpatient and outpatient care) were the most frequently reported. Most studies estimated the cost of CF using a prevalence-based (n = 18, 46.2 %), bottom-up approach (n = 23, 59 %). Direct non-healthcare costs and indirect costs were seldom included. The most frequently reported direct cost components were medications (n = 34, 87.2 %), inpatient care (n = 33, 84.6 %), and outpatient care (n = 31, 79.5 %). Twenty-eight percent (n = 11) of studies reported the burden of CF from all three perspectives (healthcare system (payer), individual, and society). Indirect costs of CF were reported in approximately 20 % of studies (n = 8). The reported total cost of CF varied widely, ranging from \$451 to \$160,000 per person per year (2022 US\$). The total cost depended on the number of domains and perspectives included in each study. Conclusions: Most studies only reported costs to the healthcare system (i.e., hospitalizations and healthcare encounters) which likely underestimates the total costs of CF. The wide range of costs reported highlights the importance of standardizing perspectives, domains and costs when estimating the economic burden of CF.

**Wranik W.D., McPherson M., Caron I., Liu H.** (2024). *Frontiers of public service motivation research in Canada: A scoping review*. *Canadian Public Administration*, 67 (1), pp. 107 – 129. DOI: [10.1111/capa.12557](https://doi.org/10.1111/capa.12557)

The Canadian public sector employs around one-fifth of Canadian workers; they are responsible for policy making, stewarding public funds, and serving the public. Canadian governments struggle with job satisfaction, engagement, retention, and turnover, all of which may be associated with public service motivation (PSM). We conducted a scoping review of Canadian PSM research to synthesize what is known about these associations in the Canadian context. We identified 24 published studies and four works in progress. These demonstrate that PSM exists among Canadian public servants from the early stages of their career until later stages, and that PSM bolsters attraction to public sector work among students. No studies measured PSM among Canadian public servants using a validated instrument. Further research about the contributions of PSM to the quality of Canadian public services and how employers can nurture PSM is recommended, particularly given recent changes in work environments.

Levasseur, K., Rounce, A., **Wranik, W.D.** (2024). *Strengthening Morale and Motivation in the Public Service in Turbulent Times*. *Canadian Public Administration* 67: 609–619. DOI: [10.1111/capa.12583](https://doi.org/10.1111/capa.12583)

The public service in Canada has undergone major changes and experienced significant pressures in the last decade. These changes and pressures create conditions of uncertainty, and alongside workplace policies, arrangements, leadership, and culture, affect the morale of current public servants and future public service motivation. This issue requires immediate attention because the morale of the public service determines the performance and quality of service delivery to citizens, as well as making the public service a good place to work. This research note prescribes a pathway for reform: 1. Define problems of morale and motivation; 2. Create a time-limited task force with the goal of creating a permanent entity to address motivation and morale; and 3. Collaborate with current and future public servants to provide professional development.

Laflamme, O., Johnson, N., Steele, K., Chavez, L., Cheng, S. Y., Rabin, H., Cheema, Z., Mamic, E., Gomez, L., Leong, J., Quon, B., Sadatsafavi, M., Stephenson, A., **Wranik, W. D.**, Eckford, P., Wallenburg, J., Bowerman, C., Stanojevic, S. (2024). Socioeconomic burden of cystic fibrosis in Canada: *BMJ Open Respiratory Research* ;11:e002309. DOI: [10.1136/bmjresp-2024-002309](https://doi.org/10.1136/bmjresp-2024-002309)

Background: Cost of illness studies are important tools to summarise the burden of disease for individuals, the healthcare system and society. The lack of standardised methods for reporting costs for cystic fibrosis (CF) makes it difficult to quantify the total socioeconomic burden. In this study, we aimed to comprehensively report the socioeconomic burden of CF in Canada.

Methods: The total cost of CF in Canada was calculated by triangulating information from three sources (Canadian CF Registry, customised Burden of Disease survey and publicly available information). A prevalence-based, bottom-up, human capital approach was applied, and costs were categorised into four perspectives (ie, healthcare system, individual/caregiver, variable (ie, medicines) and society) and three domains (ie, direct, indirect and intangible). All costs were converted into 2021 Canadian dollars (CAD) and adjusted for inflation. The cost of cystic fibrosis transmembrane conductance regulator (CFTR) modulator therapies was excluded. Results: The total socioeconomic burden of CF in Canada in 2021 across the four perspectives was \$C414 million. Direct costs accounted for two-thirds of the total costs, with medications comprising half of all direct costs. Outof-pocket costs to individuals and caregivers represented 18.7% of all direct costs. Indirect costs representing absenteeism accounted for one-third of the total cost. Conclusion: This comprehensive cost of illness study for CF represents a community-oriented approach describing the socioeconomic burden of living with CF and serves as a benchmark for future studies.

Bo Yu

Wang Y., Yu B., Chen J. (2024). Effects of product online reviews on product returns: a review and classification of the literature. *International Transactions in Operational Research*. DOI: [10.1111/itor.13502](https://doi.org/10.1111/itor.13502)

Product returns pose a significant challenge for online retailers, primarily due to consumer uncertainty, both before and after the purchase. These uncertainties may stem from factors

such as the absence of a “touch and feel” experience, mismatched product expectations, or post-purchase regret, where consumers change their minds. Online reviews, shared by previous consumers who have already experienced the products, can have a substantial impact not only on new consumers’ purchasing but also on return decisions. Surprisingly, there has been limited research to understand the influence of online reviews on product returns. This paper applies the input-process-output framework to conduct a comprehensive review and analysis of studies related to online reviews and product returns. Based on this review and analysis, a conceptual model is proposed, and an outline for the future research agenda is discussed.

Wenjun (Jenny) Zhang

Fang X., Rao X., **Zhang W.** (2024). Social networks and managerial rent-seeking: Evidence from executive trading profitability. *European Financial Management*, 30 (1), pp. 602 – 633. DOI: [10.1111/eufm.12429](https://doi.org/10.1111/eufm.12429)

This study examines whether board social networks are associated with executive trading profitability. Using a sample of US public firms with a history of executive trading from years 2000 to 2015, we find robust evidence that the profitability of executive trading is significantly lower in firms with higher levels of board social networks. The evidence is consistent with our view that board social networks effectively curb executives' private information advantage over outsiders, thus leading to a lower level of managerial rent-seeking. Our research has policy implications for regulators concerned about the role of corporate board in capital markets.

Yonggan Zhao

MacLean L., **Zhao Y.**, Zhang O. (2024). Mean-variance optimization with inferred regimes. *Annals of Operations Research* DOI: [10.1007/s10479-024-06267-z](https://doi.org/10.1007/s10479-024-06267-z)

The dynamics of financial time series display a cyclical behavior, and the performance of portfolio decisions based on the anticipated distribution of asset returns are sensitive to the alignment of the anticipated distribution and subsequently observed returns in cyclical markets. We consider that the financial market is characterized by factors, and we present a regime-switching auto-regressive model for macro-economic factors to reflect financial cycles. We then define a factor model for the distribution of asset returns, with returns depending on regimes through the factors. The dependence is on the regime sequence in successive periods, or the regime transition. The factor model structure is embedded in the asset expected returns and their corresponding covariance matrix. These regime-dependent parameters serve as the inputs to mean-variance optimization, thereby constructing portfolios adapted to the current market environment. A contrast between investment decisions based on the expectation over regimes or the selection of a single most likely (inferred) regime is provided. The improvements in portfolio performance are calibrated with market data on macroeconomic factors and exchange traded funds as investment instruments.



**Zhao Y.,** Haussmann U., Ziemba W.T. (2024). A dynamic investment model with control on the portfolio's worst case outcome. *World Scientific Series in Finance*, 21, pp. 123 – 143. DOI: [10.1142/9789811285530\\_0008](https://doi.org/10.1142/9789811285530_0008)

This paper considers a portfolio problem with control on downside losses. Incorporating the worst-case portfolio outcome in the objective function, the optimal policy is equivalent to the hedging portfolio of a European option on a dynamic mutual fund that can be replicated by market primary assets. Applying the Black-Scholes formula, a closed-form solution is obtained when the utility function is HARA and asset prices follow a multivariate geometric Brownian motion. The analysis provides a useful method of converting an investment problem to an option pricing model.