



# ICOMTT2020

INTERNATIONAL CONFERENCE ON MANAGEMENT TECHNOLOGY AND TOURISM  
SOCIAL VALUE CREATION

FEBRUARY 6 - 7, 2020

SCHOOL OF MANAGEMENT AND TECHNOLOGY OF SANTARÉM, SANTARÉM, PORTUGAL

## BOOK OF ABSTRACTS





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1st International Conference on Management, Technology and Tourism: Social Value Creation

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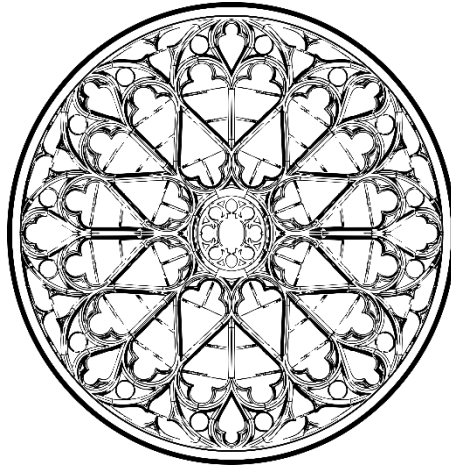
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# PREFACE

The 1<sup>st</sup> International Conference on Management, Technology, and Tourism: Social Value Creation (ICOMTT2020) emerges as an outcome of the Volto Já Project - Senior Exchange Program, developed by Polytechnic Institute of Santarém, Polytechnic Institute of Beja and Santa Casa da Misericórdia de Santarém.

During the 6<sup>th</sup> and 7<sup>th</sup> of February 2020, at the School of Management and Technology of Santarém, Portugal, we celebrate and share the knowledge built on this close relationship.

In these two special days, the ICOMTT2020 provides an opportunity for researchers, academics, national and international experts, entrepreneurs, and community leaders to exchange and share their experiences, results and deepen the debate on social value creation.

Value creation is a pillar of corporate sustainability, but it is not enough! The challenges of the next decades require a change in the dominant paradigm for the creation of social value that is the guarantee of the regions' sustainability.

This paradigm shift will be analysed and debated thoroughly according to the major areas of ICOMTT2020: Management, Technology, and Tourism.

We are grateful to all those who wanted to celebrate ICOMTT2020 with us!

The organizing committee,



# KEYNOTE SPEAKERS

#1

## Aging in contemporaneity and senior tourism

**Teresa Medeiros**

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### ABSTRACT

**Purpose:** In the context of global demographic ageing, which is more pronounced in the most developed areas of the globe, the type of constructive, positive and optimal ageing is an enormous challenge of the contemporaneity. Health promotion, maintaining a high level of physical and cognitive function, seeking positive affections and well-being, as well as social commitment and spirituality contribute to such ageing. We are witnessing a paradigm shift in people's thinking and action after retirement, with a large number of elderlies seeking knowledge, new experiences with psychological well-being, establish relationships and travel. Indeed, the progressive increase in longevity and quality of life of the last decades has contributed to the current recognition of the importance of the senior tourism segment, since post-retirement tourists have time to travel in the low season, alleviating the problem of tourism seasonality. The main goal of this study is to determine the profile of the senior tourist of the Azores

**Method:** Based on the "Turismo Sénior e Bem-Estar no Destino Açores: Criação de um Produto Cultural" [Senior Tourism and Wellness in the Destination Azores: Creation of a Cultural Product] "TUSenior55+" Project (Azores 2020 Programme), the results of a quantitative study are presented, using univariate and multivariate methods, and three differentiated profiles/groups are distinguished, based on a sample of one thousand (n=1000) senior tourists (aged between 55 and 94), according to nationality, age group, economic level, educational qualifications, type of accommodation, physical limitations, satisfaction, well-being, preferences for activities and health perception.

**Findings:** This study permits to highlight the contemporary tourism sector as an activity with great expressiveness in globalized economies, based on a new paradigm characterized by growing differentiation, customization and demand.

**Value:** This study contributes to the awareness of the different players in the senior tourism market in what concerns the requirements of demand and the necessary adaption of their offer.

**KEYWORDS:** Aging, senior tourism, elderly people, well-being

## Social tourism and the senior market: theoretical reflections and empirical insights.

Joana Lima

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### ABSTRACT

**Purpose:** In the developed countries, tourism, is increasingly becoming associated with increased levels of Quality of Life (QOL) (Cushman et al., 1996; Lima et al., 2018). At the same time, a demographic trend is the increasing number of older citizens around the developed world, with seniors being a group facing many constraints to participating in tourism. This presentation aims to reflect on the concept of social tourism (ST), particularly analysing the scientific studies conducted internationally regarding social tourism programmes for seniors.

**Design/methodology/approach:** For achieving this goal, scientific literature on social tourism, emphasizing the empirical studies, was reviewed. Electronic searches were conducted, using specialist research databases (as Scopus), to select the relevant studies to analyse.

**Findings:** There is no consensual definition of ST, but this concept is consensually related to initiatives that aim to include into tourism activities groups otherwise excluded from it. This is a topic that only in recent years has received more attention from researchers and most of the authors on the field recognized the positive effects of ST for its participants and society. Also, the need for public intervention and the challenges this represent in a period with important financial restrictions for most of the governments, are commonly recognized (Lima and Moura, 2017). Studies on ST for seniors show that the opportunity to participate on ST programmes has been found to have significant positive effects in several dimensions of their quality of life (Eusébio et al., 2015; Ferrer et al., 2015; Morgan et al., 2015). These results are even more important if we consider that seniors are frequently suffering negative outcomes from social (and spatial) isolation and are highly motivated to socialize, escape and expand knowledge through tourism (Carneiro et al., 2016; Eusébio et al., 2015).

**Originality/value:** Even though the recognition of tourism as an important part of nowadays life, today's society is also marked by a worsening of social inequalities and, consequently, a significant part of population still doesn't have access to tourism. Seniors are an important share of this excluded population. Reflections on social tourism seem to be necessary as a starting point for designing efficient strategies to promote what is now considered a basic right of individuals and a dimension that characterizes modern society and QOL – access to tourism.

**KEYWORDS:** social tourism, seniors

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## AI: Lets make it work for management

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### ABSTRACT

While AI is often considered monolithic, it encompassing a number of concepts and themes, it can be broadly understood as “making a machine behave in ways that would be called intelligent if a human were so behaving” (McCarthy, Minsky, Rochester, & Shannon, 1955). AI after a period of winter, is now enjoying a resurgence, its applications being seen from a wide range of areas from mimicking human intelligence, to creating intelligent texts to solving problems in medicine. AI and in particular machine learning is now increasingly finding a prominent place many areas, in the field of management, AI is still in its infancy. The keynote reviews some of the implications of AI in different areas, and then homes in on applications in management, and in particular a new study being undertaken in entrepreneurship.

**Purpose:** To review implications of AI, and how management and in particular entrepreneurship scholars and leverage machine learning

**Design/methodology/approach:** Keynote speech to demonstrate usefulness of AI in management

**Findings:** Work in progress, demonstrate effectiveness of machine learning for fundraising

**Research limitations/implications** (if applicable): Mention any identified limitations in the research process.

**Practical implications:** Managers can count on researchers to come up with AI solutions to problems. Making fundraising more effective

**Social implications:** Incentivize research in the area

**Originality/value:** Albeit a work in progress, to illustrate how AI can be a useful tool in entrepreneurship studies

**KEYWORDS:** artificial intelligence, management, entrepreneurship, kickstarter

**REFERENCES:** McCarthy, J., Minsky, M. L., Rochester, N., & Shannon, C. E. (1955). A proposal for the Dartmouth summer research project on artificial intelligence.

## Super-urban existential awareness in the networked society

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### ABSTRACT

Connectivity, virtuality and ubiquitous vicarious presence; They are all in the game of 21st century skills and mind sets. However the youngsters' life style also brings ideological commitment like spiritual esthetics and idolatry like 'brand-love'.

The keynote introduces the notions of 'Sense of Community' and the need for 'Citizen Awareness'. The project "Feeling Younger by Getting Older" promoted the creation of a culture of active ageing as a lifelong process; to ensure that rapidly-growing population of people who are currently in their late 50s and over would have opportunities for employment and active participation in social and family life, including through volunteering, lifelong learning, cultural expression and sports; to involve young generations in these activities. During the 2 years of project implementation, project partners collected good practice examples of ICT tools for a better ageing, volunteering and active European remembrance in their countries which can be transmitted to other places as well as compare their local backgrounds in the field of employment, health care, social services, adult learning, volunteering, housing, IT services and transport for aged people. Project activities will allow partners to generate some guidelines to teach the elders a conscious approach to ICT resources and to give them an opportunity to have a dialogue with younger generation using Open Space Technology. A recent extrapolation is the project plan "Societal Entrepreneurship through Theater Accommodation." It builds upon the IV4J Project; It promotes the development, testing and implementation of innovative practices/methodologies in VET; transferring the knowledge about the methodologies through a series of interactive guides. What is the needed transformation from traditional care into one of demand-driven focusing on unique existential episodes where generations can complement each other?



# VOLTO JÁ PROJECT

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## Social value creation: The example of the Volto Já project

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### ABSTRACT

**Purpose:** The purpose of the study is to present the formulation process of the business model of the senior social exchange program – the *Volto Já* project – as a process of enhancing an innovative value proposition for social value creation. The *Volto Já* project intends to develop a senior social exchange programme for institutionalised seniors in the Alentejo region.

**Design/methodology/approach:** The framework integrates Osterwalder and Pigneur's Business Model Canvas and Kim and Mauborgne's Blue Ocean Strategy (BOS), using Utility Map and Four Actions Framework tools (Erase-Raise-Reduce-Create). In this process, relevant stakeholders participated in sequential focus group sessions (social economy institutions' managers, seniors' assistants, social workers, academics, seniors). The optimization of the model was possible after the very first exchange programs, which allow us to adjust it with practical insights.

**Findings:** Social innovation drivers and their strategic relevance were highlighted. The value proposition, embodied in the *Volto Já* Business Canvas, reflected two fundamental ideas: mobility and social tourism to seniors. The customization of cultural and touristic activities, considering the senior profile, was identified in two perspectives: i) to value and to foster heritage; ii) to promote active ageing. The key success factor is based on the sharing resources, supported by a network of partners of Social Economy entities, reinforced by an ICT platform.

**Originality/value:** This work contributes to the business model formulation process in social projects by the integration of tools of different frameworks, in a new approach.

**KEYWORDS:** social economy, senior exchange, business model, Blue Ocean Strategy, Canvas

### ACKNOWLEDGEMENTS

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## Towards an information system for social value creation

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### ABSTRACT

**Purpose:** This research is scoped in the Project “VOLTO JÁ: PROGRAMA DE INTERCÂMBIO SÉNIOR” and objects the development of an Information System, which aims to support the social business model of the Project.

**Design/methodology/approach:** This research is conceived according to the Design Science framework in Information Systems. The Design Cycle is concerned with the development of a software artefact and an instantiation that will operationalise the VOLTO JÁ Business Model in a real scenario of elderly mobility, aiming to assess the utility, efficiency and quality of the artefact in order to achieve the goals of the project. The design of the software artefact was guided by the Dynamic Systems Development Method framework. This work encompasses only the Business study, the functional model iteration, and implementation iteration. The Business study comprised the definition of the Business Process Model and the requirements management: (1) the requirement elicitation; (2) specification and (3) validation. The Information System being developed comprises a Web platform and a Mobile application, structured on a multi-layered architecture of six layers. The Web platform is being developed with the Yii framework 2.0. The PhoneGap and Nativescript frameworks are under consideration for the development of the Mobile application.

**Findings:** The software artefact is already on the development stage. The proposed software architecture has already been validated and some of the business processes are already supported.

**Originality/value:** As far as we know, there are no other similar projects to compare to. We might remotely compare our project to with Travel 2.0 systems, such as Booking.com. However, we are focused on a very specific target with peculiarities that these systems are not prepared to deal with. This attests to the relevance and uniqueness of our proposal.

**KEYWORDS:** Social Business Model; Information System; Tourism; Social Value Creation

### ACKNOWLEDGEMENTS

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## A framework for developing tourism packages and experiences in senior tourism

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### ABSTRACT

**Purpose:** The senior tourism market is fully integrated in sociodemographic trends and overall demand of tourists in the present decade (Alén, Domínguez, & Losada, 2012). This paper aims to describe a methodological proposal for the design of tourism packages and evaluation of tourist experiences for the senior market segment within the VOLTO JÁ project ('I'll be right back'), a project for the exchange of institutionalized elderly people in social economy organizations (SEO). The business model for the VOLTO JÁ project is the operationalization of a senior social exchange programme to enable tourism to be available to everyone regardless of their social status (Oliveira et al., 2017).

**Methodology:** This paper is anchored in a conceptual model definition for the development of tourism packages and evaluation of tourism experiences in senior mobility which were drawn up based on a set of data collection instruments. The proposed model, called OEC, is divided into three phases: (i) Organic (O), aiming to contact the privileged information agents (the SEO representatives); (ii) Experiential (E), aiming to collect data during the senior's exchange, through direct observation, free elicitation and visual records (image), and (iii) Complex (C), comes after senior's exchange, with the use of a semi-structured interview.

**Findings:** The proposed model has already been operationalized by carrying out 12 seniors' exchanges achieved within the objectives of VOLTO JÁ project.

**Originality:** With this proposal, the authors intend to transfer the model to other contexts that work with this market segment, senior tourists, in order to constitute a tool for evaluating the tourism packages and the experience itself.

**KEYWORDS:** OEC model, Senior tourism, Tourism experience, Tourism packages, VOLTO JÁ project.

### ACKNOWLEDGEMENTS

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## How to measure the impact of participation in the Volto Já project on the seniors' quality of life?

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### ABSTRACT

**Purpose:** One of the aims of the Volto Já project (Oliveira et al., 2019) is to improve the quality of life of elderly people and active ageing (e.g., increasing well-being, life-satisfaction, happiness, between others). This research aims to explore the ways how that quality of life can be measured in the context of the aforementioned project.

**Design/methodology/approach:** For measuring the impact in the quality of life of the seniors' through the participation in the Volto Já project we used the following measures: (a) quality of life (Power, 2003), (b) satisfaction with life (Diener, 1985), (c) single item of happiness, (d) emotional well-being (European Social Survey, cited by Michaelson et al., 2009). As the control variables used: (a) the Katz index of independence in activities of daily living (Katz, 1963; Katz et al., 1070), and (b) satisfaction with the Volto Já activities. The measures were applied twice to seniors: before and after participating in the Volto Já activities.

**Findings:** The impact of participation in the Volto Já project on the seniors' quality of life will be measured by comparing the results of the above measures before and after participating in the Volto Já activities. It is aimed to measure the value of participating in such activities, namely assessing if there are benefits for the senior's life.

**Originality/value:** Measure is fundamental to better understand and manage the impact that the participation of seniors in touristic activities can have in their life and in variables that influence their quality of life.

**KEYWORDS:** Volto Já, quality of life, satisfaction with life, happiness, emotional well-being

### ACKNOWLEDGEMENTS

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## The role of social tourism in the satisfaction of elderly customers: The case of the *Volto Já* Project

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### ABSTRACT

**Purpose:** This research intends to capture the perceived value by the elderly through the participation in social tourism programs, and the link between the social tourism experience and their satisfaction as customers of social welfare services. It aims to: 1) study the perceptions of the interviewees regarding the specificities of the programs; 2) understand the relationship between the participation in social tourism activities and elderly customers' satisfaction.

**Method:** To accomplish our proposal we used the *Volto Já* Project as the main source of information since it's a research project that implements a social business model through a network of Social Economy institutions and promotes a senior exchange program between these institutions. Data is collected from the participants of social tourism activities provided by *Volto Já* Project regarding their participation in such activities. The study follows a qualitative design with data collected by semi-structured interviews. The sample is composed by 23 elders (14 females, 9 males, average age of 79). The interviews were scrutinized with content analysis procedures.

**Findings:** We have some evidence that participation in social tourism activities increases the satisfaction of the elderly like a welfare service customer. However, satisfaction with the organization depends on corporate image and for those that link satisfaction with the services provided by the organization the participation in *Volto Já* experience does not interfere with elderly customer satisfaction.

**Originality/value:** This study allowed us to evaluate the experience of the social tourism program and its effects on customer's satisfaction with the organization. Their very own perception brings unprogrammed topics for this evaluation, enriching our work and enabling its use as a plus for future research.

**KEYWORDS:** elderly customers satisfaction; management; qualitative methodology; social tourism; *Volto Já* project

### ACKNOWLEDGEMENTS

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## Communication design and market analysis in senior tourism: Volto Já project

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### ABSTRACT

**Purpose:** The following study aims to describe the participation of a multidisciplinary team from Polytechnic Institute of Beja, in VOLTO JÁ project. This project aims to operationalize a cooperation program between social economy organizations, and it promotes the exchange institutionalized seniors, providing them with cultural, tourist and artistic experiences. Therefore, activities were established to structure and to develop the project, and team was responsible for the following: design, market analysis and development of social tourism packages and dissemination results. Taking into account the project's characterization, we will describe activities mentioned and how they have contributed to its implementation and consolidation, in accordance with main objectives established: a) to define a graphic identity for an effective communication, adaptable to various communication materials required for project development and dissemination; b) to define an user interface and user experience design of a software platform enabling social economy institutions to join senior exchange program; c) to make market analysis and development of social tourism packages for senior.

**Design/methodology/approach:** We propose to present activities' outcomes trying to answer the anticipated objectives, through a methodology based on literature review in Communication Design and Social and Senior Tourism areas. The study was also supported in the practice of design project as well as design thinking method in order to solve identified problems.

**Findings:** Consequently, it is intended to demonstrate activities carried out and that were put into practice, responding to main objectives and challenges of the project, taking into account its

specific target audience and stakeholders. Through this case study and applying a user-centered strategy, we seek to contribute with particular solutions that can be applied in future projects in the social tourism area.

**KEYWORDS:** Communication Design, Graphic Identity, Senior Tourism, Tourism packages, VOLTO JÁ project.

## ACKNOWLEDGEMENTS

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## Digital communication strategy for a social economy project supported by web platform

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### ABSTRACT

**Purpose:** This study aims to systematize key indicators considered in the communication strategy of the "Volto Já – Senior Exchange Program" project, according to its communication plan, comprising objectives, planned activities and contribution to validate a business model applied to the social economy sector. Recent studies indicate that the percentage of older adults using social networking technologies is increasing, stimulating research on "their use" and on their "communication behaviours". However, the literature states that it is necessary to distinguish between "social networks" and "social support", which are relevant for communication and the development of the web platform that aims to promote the mobility of older people. It is necessary to adapt messages and channels to the platform's objectives, seeking to respond to the "how" and "why" of communication options.

**Design/methodology/approach:** The research took on an exploratory case study based on the "Volto Já" project, ensuring the validity of the research construct by adopting different sources of chained evidence. The literature review and empirical knowledge allowed the creation of quantitative data collection protocols which analysis ensured the reliability of the case study and its transferability.

**Findings and Value:** A web-based service implementation, with a value proposition aimed at promoting a business model in the field of senior tourism, requires the study of the digital communication strategy appropriate to the growing involvement of the target audience in the service development. Adopting appropriate metrics to assess the effectiveness of digital communication strategy also provides data for the development and validation of the business model.

**KEYWORDS:** Digital Communication; Communication Plan; Communication Strategy; Social Economy; Senior Tourism; Social Media.

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# MANAGEMENT & INNOVATION

#8

## Food: How it influences cultural value creation and the development of cultural innovation.

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### ABSTRACT

**Purpose:** The purpose of this paper is to demonstrate that products can create value in different forms, namely use value, economic value and cultural value, and contribute to the development of cultural innovation throughout changes in people's behaviour.

**Methodology:** Four short case studies were conducted, based on literature review. A search was conducted to collect relevant information to characterize two food products and two specific dish recipes, in terms of their origin, history, changes and commercial movements among places, countries and continents, and how they affected people's behaviours.

**Findings:** The analysis of the existing literature content indicates that products carry, apart from their use and economic value, cultural value within themselves, when moving among places, countries or, even, continents. That cultural value can affect the behaviour of recipient populations.

**Social implications:** The understanding of the cultural value that products might transport within themselves may indicate how they contribute to the creation of value in its different forms and how it affects social behaviour.

**Value:** This paper may be relevant to academics and professional in the fields of business strategy, marketing and economy, as it might indicate potential avenues to understand how value is created and which dimensions of that same value are contributing the most to societal changes.

**KEYWORDS:** Value creation, cultural value, cultural innovation, social changes.

## Entrepreneurship: A bibliographical study on their origin, types and enhancing factors

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### ABSTRACT

**Purpose:** Entrepreneurship has been the subject of increasing academic studies due to the importance of this process in the creation of jobs and the possibility of raising better living conditions for its actors, in the design of innovative products, thus also constituting a strong driving economic growth. Therefore, this article aims to clarify the origin, the concepts, the types of entrepreneurship and also its potential factors.

**Design/methodology/approach:** This article was based on an exploratory research and this was important in that it made possible the relationship, in a more intimate way, with the phenomenon under consideration, as well as the delimitation of more specific questions that could be used for further investigations. After identifying the relevant articles for our study, we proceeded to a qualitative analysis of the data, using the technique content analysis.

**Findings:** From this article several conclusions emerge, namely, the importance of entrepreneurship in the social and professional life of its stakeholders and the merit of teaching as a factor that enhances this process. Concepts such as need and opportunity entrepreneurship, corporate entrepreneurship, social entrepreneurship and, as well, Start-Up entrepreneurship are emerging.

**Originality/value:** The results allow a deeper reflection of the themes approached here as well as elucidate the relevance of teaching in the growth of the entrepreneurship rate and, as well, which factors promote it.

**KEYWORDS:** entrepreneurship, origin, types, enhancing factors.

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## An exploratory study on digital marketing adoption by industrial B2B companies

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### ABSTRACT

**Purpose:** Recent contributions in the literature (e.g., Ancillai et al., 2019; Dasser, 2019; Vieira et al., 2019) provide interesting contributions on the opportunities, challenges and pitfalls of the adoption of digital marketing provided by B2B companies. This article aims to further contribute to understanding the adoption of digital marketing, particularly by Industrial B2B companies. Based on the main contributions in the literature, this study defined two research questions: (i) what factors facilitate their adoption of digital marketing strategies?; (ii) how does digital marketing affect their performance?

**Design/methodology/approach:** Following a qualitative approach, semi-structured interviews were conducted with nine managers of Portuguese companies from different B2B market sectors and with various profiles in terms of age, total number of workers, and sales volume.

**Findings:** Results reveal some scepticism toward digital marketing by B2B managers, despite the unanimous acknowledgement of the internet as an essential information and communication channel. The study shows the difficulty in defining digital marketing objectives, which are often nonexistent or too generic to be effective.

**Research limitations/implications:** Due to the exploratory nature and sample dimension, these results require further validation by future studies on the topic.

**Practical implications:** This article provides valuable insights for B2B companies developing or aiming to develop digital marketing strategies by pointing important pitfalls of participants' implementation process.

**Originality/value:** This article offers a synthesis of factors that are suggested as determinants of digital marketing success in the B2B context that are expected to be of value for both B2B managers and digital marketing scholars.

**KEYWORDS:** B2B, digital marketing, marketing communication, marketing strategy.

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## Can digital marketing leverage internationalization of B2B companies? Taking note of managers' insights

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### ABSTRACT

**Purpose:** In the era of globalization, digital marketing is an essential strategy for companies in all business sectors, including B2B markets, as demonstrated by recent contributions in the literature (e.g., Chong et al., 2016; Lee & Falahat, 2019; Watson et al., 2018). Building on extant literature, this article further explores the ability of digital marketing to leverage the internationalization of B2B companies. The objectives of the research are: (i) understand B2B companies' attitudes toward digital marketing in their internationalization strategy; (ii) explore the preferences and efficacy of digital marketing tools to reach international markets.

**Design/methodology/approach:** The study adopted a qualitative approach by using semi-structured interviews with Portuguese managers of fifteen B2B companies that have international experience or intend to expand internationally. A content analysis was used.

**Findings:** Results show that some participants are sceptical about the efficacy of digital marketing in the B2B context, while others acknowledge the role of digital channels to engage with international customers, facilitating relationship management and justifying further investment.

**Research limitations/implications:** Because of the sampling method, results require further validation.

**Practical implications:** This article provides valuable cues for managers and researchers interested in B2B internationalization. It shares insights about the use of digital marketing to foster internationalization and reports on attitudes and difficulties faced by companies that neglect digital marketing when approaching global markets.

**Originality/value:** This article addresses a disregarded topic in the literature. The insights of B2B managers provide empirical evidence, may inspire other managers and offer relevant suggestions for future research.

**KEYWORDS:** B2B, digital marketing, globalization, internationalization, strategy.

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## Importance of innovation networks: Case study in Higher Education Institutions (HEIs) in Portugal

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**Purpose:** The article aims to understand the factors that foster business creation within a specific set of HEIs in Portugal through innovation networks. Considering the recognized importance of innovation networks in business creation and the role of HEIs in stimulating these innovation networks, this research aims to analyze a specific set of factors that the literature has established as contributions to business creation.

**Design/methodology/approach:** In this follow-up, the article, after reviewing the literature on business creation through models of innovation networks, analyzes data from a questionnaire completed by 255 nascent entrepreneurs who, in one way or another, had attended higher education institutions with specific objective of developing their entrepreneurial skills.

**Findings:** The data were submitted to the factor analysis and logistic regression model and the results show that cooperation and the development of relationships with other agents of the innovation network emerge as the main way that higher education institutions stimulate the creation of companies.

**Originality/value:** Regarding the objective of identifying what facilitates the creation of companies, the nascent entrepreneurs selected as the most important, the “actors of the network” factor and this factor covers whatever encourages and dynamizes the various elements that make up the innovation network by promoting knowledge sharing and support for budding entrepreneurs in the various stages of business creation.

**KEYWORDS:** innovation networks, business, entrepreneurial development, Education Institutions

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## Internal centralization of warehouses in the health sector and influence on financial results: Theoretical review

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### ABSTRACT

**Purpose:** The concept of centralization comes to understand as an organizational spectrum that goes far beyond infrastructures, as there may be centralization or decentralization at various levels: transport, operational coordination or decision making.

**Design/methodology/approach:** From the methodological point of view this article was elaborated through a literature review illustrating the state of the art in relation to the subject under study, document analysis and observation.

**Findings:** We can conclude that the issue of centralization cannot be defined as an absolute term and cannot define organizations as centralized or decentralized, but we can define institutions as tending centralized or tending to be decentralized, however, financial investment in warehouses decreases when centralizing into one central strategic warehouse.

**Originality/value:** the research aims to analyze and understand the evolution of the logistics centralization process developed by an organization in the health sector, as well as to understand the operational and management impact of the centralization process.

**KEYWORDS:** Warehouses, Health Sector, Financial results, Logistic centralization

## Logistic optimization process in hemodialysis clinic

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### ABSTRACT

**Purpose:** The current socioeconomic environment inflict health care delivery based on high efficiency management models. Considering that information management and logistics are essential structural elements for the functioning of healthcare organizations, the proposed work aims to optimize this management in a hemodialysis clinic based on good practices in the field of information management and logistics in health and technological innovation.

**Design/methodology/approach:** To achieve this goal, a five-dimensional logistics optimization tool was created: warehouses, stock management, distribution systems, health lean and information systems. In methodological terms, a documental analysis was used to create the tool and observation applying field notes to collect data related to its application.

**Findings:** Through the application of the tool, it was verified the need of uniformity of the storage typology in the external hemodialysis centers; labeling and coding of equipment for optimizing stock management; improved information transmission through electronic and message notifications; creation of a digital computerized inventory management platform with daily updated stock flow, possibility of rationalization of orders and economic order quantity calculation.

**Originality/value:** The logistic optimization tool proved to be easy to apply without raising doubts or misunderstandings, which makes it an interesting solution for most health facilities. Its application in a hemodialysis clinic allowed the optimization of information flows and its logistics.

**KEYWORDS:** Warehouses, Stock Management, Distribution Systems, Logistics, Health Lean, Information Systems.

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## Preventing misinformation in data visualization

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### ABSTRACT

**Purpose:** In today's data-driven society, statistical graphs are very powerful communication tools, ubiquitous in the media, commercial advertisements, technical and business reports or scientific research. The widespread use of graphs assume they are clear to the recipients of the information, however graph comprehension is a complex task (e.g. Dreyfus & Eisenberg, 1990). In order to understand how deep our students' knowledge about the use and misuse of graphs is, we set a task involving the reading and interpretation of a bar graph elaborated by the authors of the study, using real data, and deliberately orienting the graph design towards a preconceived target. With the information collected in this task, and others assessing basic skills of statistical literacy, we could plan and implement strategies to promote graph reading and interpretation proficiency, as well as, other statistical literacy skills among our higher education students.

**Design/methodology/approach:** The task we here describe and analyse consists in reading and interpreting a bar graph with truncated y-axis, we often use to trigger a discussion about the importance of graph interpretation skills and alert to distortion techniques used in graphing. The participants in this study were forty-three students of polytechnic higher education institutions.

**Findings:** The students' answers were analysed regarding the influence of y-axis truncation in the interpretation of the graph and the levels of graph comprehension achieved. Overall, students demonstrated a lack of skills in interpreting the graph content, reaching mostly only the first of the three data comprehension levels, proposed by Cursio (1989).

**KEYWORDS:** Bar graph, Graph interpretation, Statistical literacy, higher education students.

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## The impact of transformational leadership on employees' affective commitment, stress and performance

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### ABSTRACT

**Purpose:** This study aims at providing a more comprehensive understanding of how transformational leadership can affect employees' organisational affective commitment, stress and individual performance.

**Design/methodology/approach:** The study's sample includes 150 employees from private Portuguese organisations. Based on an online survey, respondents assessed their managers' perception of transformational leadership style and self-reported their affective commitment to their organisation, stress levels and perceptions about their performance.

**Findings:** The findings show that transformational leadership has a positive impact on employees' organisational affective commitment and performance, and that transformational leadership contributes to lower employee's stress levels. In addition, stress is negatively related to organisational affective commitment, and the latter is positively related to performance. Finally, the findings suggest the mediator role of affective commitment in the relationship between transformational leadership and individual performance.

**Practical implications:** Organisations can increase employees' affective commitment and individual performance and decrease employees' stress levels by encouraging managers to adopt a more transformational leadership style.

**Originality/value:** This study integrates transformational leadership, effective commitment, stress and individual performance into a single research model, thereby extending previous research on this topic.

**KEYWORDS:** Transformational leadership, affective commitment, stress, individual performance

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## Entrepreneurial ecosystems: Assessing public sector interventions

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### ABSTRACT

**Purpose:** Isenberg defined an entrepreneurial ecosystem (EE) as a set of individual "entrepreneurial conducive" elements, combined in complex ways, these elements constitute a system that effectively promotes sustainable venture creation and economic growth (Isenberg, 2010, p. 41). This potential for economic growth has attracted the attention of governments, regional and local authorities. Public-sector agents acting as stewards of shared resources and collective interest encourage and shape entrepreneurship, while the private counterpart ensures the development of economic activity, establishing a symbiotic relation. Appraise and provide evidence-based, context sensitive and grounded insights on the effectiveness of public-sector interventions and institutional capacity to create and foster EE.

**Design/methodology/approach** Case studies (CS) represent a valuable, context rich information source. To assess effectiveness of public sector interventions, we studied a set of CS using a qualitative meta-analysis approach, this method allows synthesis of complex interventions, appropriate for studying processes since it focuses on identifying necessary and sufficient conditions for outcomes to be observed (Combs, Crook, & Rauch, 2019, p. 6).

**Findings:** In order to provide adequate support to EE public-sector must implement effective strategies and develop its own institutional capabilities.

**Originality/value:** The type and impact of public-sector interventions in EE are still understudied issues. (Ferreira & Wanke, 2019) What are the outcomes of these initiatives? In underdeveloped regions, what policies effectively boost development of EE for spatial "losers"? The answer is significant for all stakeholders, especially for public-sector agents engaged in executive responsibilities, concerning creation or support of EE.

**KEYWORDS:** Entrepreneurial ecosystems, public-sector, qualitative meta-analysis

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## Entrepreneurship initiatives of Portuguese enterprises: An exploratory study on the obstacles' entrepreneurs face

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### ABSTRACT

**Purpose:** The benefits of entrepreneurship for economic growth and consumer welfare are widely recognized by academic literature (e.g., Dhahri & Omri, 2018; Drucker, 2015; Prieger *et al.*, 2016). However, the obstacles that entrepreneurs face during the product innovation and development process can undermine its effectiveness or even make it unfeasible (Lougui & Nyström, 2014; Olawale & Garwe, 2010), and deeper research is needed. In this sense, this article has two objectives: (i) to identify the main obstacles that are commonly faced in entrepreneurship initiatives by top managers; (ii) to describe the ways used to overcome these obstacles.

**Design/methodology/approach:** This study adopted a qualitative approach by using semi-structured interviews with Portuguese top managers of thirty three Portuguese companies that have a diversity of profiles in terms of age (start-ups/mature/centenary companies) and dimension. Data was collected in 2019 and subject to content analysis.

**Findings:** Results show that high initial investment, time needed to launch the new product and lack of consumer trust in the company are the mains obstacles that entrepreneurs face. Moreover, some marketing recommendations have been highlighted to provide entrepreneurs with tools to overcome these obstacles.

**Research limitations/implications:** Due to the exploratory nature and sample dimension, these results require further validation by future studies on the topic.

**Practical implications:** This article provides valuable cues for managers of companies interested in entrepreneurship. The exploration of the obstacles that entrepreneurs face and the solutions highlighted, could be very useful to promote entrepreneurs initiatives efficacy.

**Originality/value:** This article provides valuable contribute to academics interested in this topic and to entrepreneurs that intend to avoid and/or minimize the effects of obstacles faced by others companies in their entrepreneurship strategies.

**KEYWORDS:** entrepreneurship, innovation, marketing, obstacles of entrepreneurship

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## Intention to use skin care products by men

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### ABSTRACT

**Purpose:** Cosmetics and skin care products have played many roles in history, and today, personal image has a growing importance in humans. Today, personal image importance is growing and the use of cosmetics is no longer exclusive to women, and skin care products usage is growing in men (Draeos, 2000). Thus, the purpose of this study is to understand the skin care products usage. Therefore, we identified as antecedents of skin care products usage the need for uniqueness, vanity and subjective norms

**Design/methodology/approach:** To achieve the objective of this study, we conducted a cross-sectional study. Data was collected, from a 169 young men, from May 2019 to August 2019 on cosmetics stores through a 5 point Likert scale questionnaire. The scales were adapted from Hung et al. (2011), Hong and Tam (2006), Ghazali, Soon, Mutum and Nguyen (2017), Tajeddini and Nikdavoodi (2014) and Ajitha and Sivakumar (2017). The data were tested against the proposed research model using PLS-SEM.

**Findings:** The results indicate that vanity and subjective norms has an impact on attitude toward skin care products usage. This attitude act as a mediator on skin care products usage intention.

**Research limitations/implications:** In Portugal the men use of cosmetic products is still low and may have biased the findings and data collection was online.

**Practical implications:** This research helps companies understand the characteristics of men that affect the use of skin care products through tested model

**Originality/value:** As the men's cosmetics market appears to be a potentially booming industry and several brands already produce specifically male lines. This paper presents a model of intent to use men's skin care products. Therefore, this paper shows the importance of considering vanity and subjective norms when organizations define marketing plans.

**KEYWORDS:** Skin Care, Intention to use, subjective norms

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## Location strategies of a Portuguese company of production and commercialization of beer and soft drinks

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### ABSTRACT

**Purpose:** This work is framed on the operations management and location strategies' topics, applied to a Portuguese company of production and commercialization of beer and soft drinks based in the area of Lezíria do Tejo. It aims: (a) to analyse the factors affecting strategic decisions related to the location and (b) to propose the location of a central warehouse using the Centre-of-Gravity method and the Factor-Rating Method.

**Method:** This study follows the case study approach, with information collected through documentary analysis and a semi-structured interview with the production director of the company under study.

**Findings:** The main factors that justify the location of the company are: (a) land and installations acquisition costs; (b) access to the main material (water); (c) proximity to customers; (d) cost of manufacturing labour. Using the Centre-of-Gravity method and the Factor-Rating method, alternative locations will be analysed for a future logistics warehouse of the company, taking into consideration its main domestic and foreign customers.

**Value:** This work allows us to reflect on the strategic issues associated with the location. In addition, heuristics analyses are presented aiming to propose a future warehouse location, which seeks to minimize the distances travelled and the operation costs of the new warehouse.

**KEYWORDS:** Centre-of-Gravity method, Factor-Rating method, location strategies, operations management

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## The humble and transformational leadership styles as antecedents of emotional intelligence skills in health sector employees

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### ABSTRACT

**Purpose:** This study aims to shed light on the study of leadership as antecedent of Emotional Intelligence (EI) skills in health professionals, introducing the styles of humble and transformational leadership as variables in this process.

**Methodology:** The study follows the quantitative methodology paradigm and a non-experimental, cross-sectional, exploratory and descriptive-correlational analysis type. We obtained a sample of 438 employees who completed a survey with three scales of leaders' leadership behavior (humble, transformational and transactional) and one self-assessment scale of EI.

**Findings:** The results show that the leadership style adopted by the leader acts as antecedent of the employees' EI in certain circumstances. The marital status, gender, age and professional group have a predictive value for some EI dimensions. Age and gender moderate the relationship between the type of leadership exercised and the skills of EI acquired in some dimensions.

**Research limitations:** The study is conducted in a non-probabilistic convenience sample and its results are valid only in the studied context.

**Practical implications:** This study furthers the understanding of and explores the topic of leadership and EI in health organizations and raises awareness of the notion that emotional skills can be learned, improved and developed with education and training.

**KEYWORDS:** Skills, Emotional intelligence, Humble leadership, Transformational leadership, Survey

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## The influence of engagement and well-being at work on the performance of healthcare professionals

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### ABSTRACT

**Purpose:** The growing interest in engagement and well-being at work follows a global trend of emphasis on humanistic values in organizations. This study aims to empirically test the relationship between engagement, well-being at work and the professional performance of employees in the context of a healthcare organization in Portugal.

**Method:** A cross-sectional study is presented that follows a quantitative approach with data collection through a questionnaire. The sample comprises 277 employees from various professional groups at a Portuguese healthcare institution. Data were collected by applying a questionnaire consisting of four scales. The data were submitted to exploratory factor analysis. We analyzed the internal consistency of the scales and proceeded with the analysis of means, correlations and multiple hierarchical linear regressions.

**Findings:** The results suggests the following: (a) employees feel active but tired; (b) employees recognize their work as having great meaning and usefulness and are proud of it; (c) engagement predicts the individual performance of healthcare professionals, namely their in-role behaviors and organizational citizenship behaviors (OCB); (d) in terms of well-being, the positive affect predicts in-role behaviors but there is no evidence that it influences OCB.

**Originality/value:** The results of this study can be used to implement strategies that promote the personal development of employees and teams in the context of health organizations.

**KEYWORDS:** engagement, healthcare professionals, in-role performance, organizational citizenship behaviors, well-being at work

**ACKNOWLEDGMENT:** The authors gratefully acknowledge support from Centro de Investigação em Qualidade de Vida (Life Quality Research Centre – Grant number UID/CED/04748/2019).

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## Forecasting demand for dairy products: A practical example

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**Purpose:** With this work, we intend to make a forecast of three products (unsalted butter, brie cheese, and Camembert cheese) of a dairy company.

**Design/methodology/approach:** The study follows a case study methodology, with quantitative data collection and applies two forecasting methods. The case study is applied to a multinational company, based in France, with a subsidiary in Portugal. The Portuguese company aims to sell wholesale milk and its derivatives. The products studied are the best sellers in Portugal.

**Findings:** After verifying the suitability of the forecast methods, the method of decomposition and the method of moving averages were applied to the data on the demand of the three products in the last two years, to predict demand for the next 12 months of the year. The predicted values are graphically presented, as well as statistics are calculated to evaluate the quality of forecasts (mean error and mean absolute deviation).

**Value:** The forecasts made allow the company to make a better management of the inventory management, namely, to identify the quantities to be bought to suppliers, as well as optimize the stock management.

**KEYWORDS:** forecasting demand, decomposition method, method of moving averages, case study, dairy products

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## Technology transfer and knowledge sharing, from interface entities to industry, as an incentive for innovation and development (Observ.Tech Project)

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### ABSTRACT

**Purpose:** Research, technology transfer and knowledge sharing are considered the essence of economic growth. Companies get involved in transfer activities in order to update and modify their knowledge base and expand their technological capabilities to improve their competitiveness.

**Approach:** This study begins by providing an overview of the key obstacles and opportunities associated with knowledge and technology transfer (KTT) actions. This is the first step to identify suitable solutions, with the goal of favouring and encourage this entire process, and especially, to promote a close relationship between Interface Centres and the business communities. Thus, the different dimensions that constitute the KTT system were addressed (agents, stages, mechanism factors, models), highlighting the role of Interface Centres, in particular Technology Centres ,and presenting a case study (Observtech Project) that exemplify a strategy carried out by a Portuguese Technological Centre, which aims to promote KTT actions in specific fields of knowledge, focused on the challenges faced by companies in the metalworking sector, associated with shrinking product life cycles and accelerated rates of technological change.

**Methodology:** This research employs a qualitative and explanatory approach considering all the components of a situation, their interactions and influences, the extent and nature of cause-and-effect relationships, in a holistic view. It begins with a literature review, allowing to understand what has been said and the conclusions reached, followed by the identification of the main characteristics and components of this system, highlighting the importance of these initiatives and strategies, promoting their proliferation.

**KEYWORDS:** Technology transfer, Innovation, Knowledge sharing, innovation, interface entities

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# FINANCE AND ACCOUNTING

#12

## The accountant profession's history in Portugal, with special focus on the 18th century

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### ABSTRACT

**Purpose:** The purpose of this paper is to develop and explain, from a scientific and pedagogical point of view, the knowledge of the accountant profession's history during the 18th century in Portugal. The paper gives attention to the most important events in chronological order and gives emphasis to the Lisbon School of Commerce (1759), the first official educational institution to teach compulsory double-entry bookkeeping in Europe, which became a national pride.

**Design/methodology/approach:** This research is based on secondary sources, therefore using the bibliographical method of investigation.

**Findings:** The study enlarges the knowledge of the events that marked the 18th century, recalling the dates that printed this century, which became the most important period of the development of the accountant profession in Portugal.

**Social implications:** The exposition presents a theoretical–practical implication for accounting education and for society: it can be used as studying material to enhance the motivation of business science students at the beginning of their studies.

**Originality/value:** This is an article that contributes to the knowledge of Portuguese accounting history by means of a literature review that contributes to the cultural enrichment of accounting students and accounting professionals.

**KEYWORDS:** Accounting, 18th century, Portugal, Double-entry bookkeeping, Lisbon School of Commerce.

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#21

## The relation between information asymmetry, disclosure policy and corporate tax planning

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### ABSTRACT

**Purpose:** The call for greater transparency from companies it's seen as a way to help reduce tax avoidance. Although some studies have linked tax planning to various factors, few studies have examined the relation between information asymmetry, disclosure policy and tax planning. Managers visibly face conflicts between financial disclosure quality and tax planning. Academic research point financial analysts as a way to reduce the information asymmetry and reduce corporate tax avoidance.

**Approach:** The main purpose of this paper is to discuss the relation between information asymmetry, disclosure policy and corporate tax planning, by revisiting the main empirical literature. Firstly, we discuss concept of information asymmetry and its measures. After, we analyse the concept of tax planning. Finally, we examine the relation between information asymmetry, disclosure policy and tax planning.

**Findings:** Academic research point financial analysts as a way to reduce the information asymmetry between firms and investors, and as a consequence, they reduce corporate tax avoidance. Some authors argue that if shareholders want to monitor firms' tax related decision, disclosure policies and tax regulatory bodies should consider requiring increased tax related disclosures by firms. However, other authors argue that with increased tax related disclosure, managers are discouraged from pursuing "legitimate" tax planning activities.

**Originality/value:** The added value of this work relies on the analysis of empirical literature results about information asymmetry, disclosure policy and tax planning, providing a more extensive overview of this relation. This study provide insights that tax authorities and politicians can use to better focus their strategies and actions in order to increase compliance and reduce tax evasion.

**KEYWORDS:** information asymmetry, disclosure policy, corporate tax planning

## Financial distress in municipalities

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### ABSTRACT

**Purpose:** The main goal is to explore the main determinants of financial distress for Portuguese municipalities in the framework of the Portuguese Local Finance Law. The financial solvency of municipalities is a relevant matter either at a macroeconomic level, on the issue of Total Public Accounts' control and to fulfill the goals established in the Stability and Growth Pact, but also at the microeconomic level, where the central issue is that situations of financial imbalance cannot jeopardize the attainment of municipalities' mission.

**Design/methodology/approach:** Through a logit model, several potential explanatory variables (socioeconomic, financial and political) were tested, namely factors that have been studied in the empirical literature as determinants of local governments' indebtedness.

**Findings:** The main findings point to the relevance of the weight of investments in total expenditures to explain financial problems in local governments.

**Practical implications:** The issue of municipalities' indebtedness and their default probability is a very interesting topic of research and highly relevant for policy purposes. This is important for municipal executives and for control entities (Court of Auditors, DGAL, DGO) to ensure an efficient and sustainable financial management.

**Originality/value:** The probability of fiscal distress in the context of Portuguese municipalities is barely studied. Only Janda & Moreira (2016) and Lobo, Ramos & Lourenço (2011) address this specific issue. We revisit this topic with more recent data. Currently, more competencies are being assigned to local governments and more financial resources being requested. Studies that provide clues as to which factors affect the financial health of municipalities are particularly relevant.

**KEYWORDS:** municipalities, fiscal distress, indebtedness, Portuguese Local Finance Law

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## Board gender diversity and capital structure: the case of Portuguese listed firms

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### ABSTRACT

**Purpose:** This investigation aims to analyse the impact of board gender diversity on firm's capital structure. Specifically, we verify if female presence on the board of directors, as CEO, executive or independent members has impact in the firm's decision making, and in turn, its indebtedness.

**Design/methodology/approach:** A panel data of non-financial Portuguese listed firms from 2010 till 2018 with a total of 316 observations is analysed. Four proxies of capital structure are used: total, long-term, short-term, and financial debt. Capital structure is regressed against gender variables. Some control variables are also included to deal with firm's specific characteristics. The model is regressed using OLS with fixed effects estimator.

**Findings:** The results show that gender diversity impacts firms' indebtedness. The effects of gender diversity vary according gender measures and capital structure proxies. Women presence on board consistently contribute to the decrease of long-term debt, while female CEO have only impact on market indebtedness measures. Female CEO significantly contribute to the firms' financial policies by decreasing the market levels of total debt, long-term debt and financial debt. In addition, boards with a higher fraction of executive females, present higher levels of total debt, and tend to prefer short-term debt to long-term debt, both in terms of book and market measures. Concomitantly, and despite the non-robustness of the findings, were the first to document a negative association between the fraction of independent women directors and long-term debt. This pioneer result, seems to indicate that women independent directors contribute to moderate the general tendency of independent directors to increase firms' long-term debt.

**Practical implications:** Our results should interest to governments and regulatory authorities in future corporate governance recommendations. In addition, our findings may help investors to better understand firm behavior according the roles attributed to female directors in the corporate boards

**Originality/value:** Our study is the first to analyse the relationship between board gender diversity and the definition of firms' financial policies, in the Portuguese context. In addition, we contribute to the scarce literature of this particular determinant of capital structure by jointly introducing, in our empirical models, a number of gender diversity measures, not simultaneously studied in the extant literature.

**KEYWORDS:** gender diversity, female, board of directors, corporate governance, capital structure

## Financial balance and profitability relationship in the SMEs – A comparison between Portalegre and Portugal in the wine sector

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### ABSTRACT

**Purpose:** The Portuguese market consists mostly of small and medium-sized enterprises (SMEs). This study aims to analyse the relationship between the financial balance and profitability of SMEs, using a sample of eight companies from the wine sector of Portalegre, when compared to the national market, in the period between 2013 and 2017.

**Design/methodology/approach:** A brief review of the literature was carried out where the concepts of financial management, financial analysis and ratios were discussed, as well as, a brief description of the wine market in Portugal. Indicators of balance and profitability were used, and the correlation coefficient to understand in what extent the financial balance contributes to increasing the profitability of companies was also determined. The Central Balance of Portugal Bank and the database SABI were used to select the companies to build the sample.

**Findings:** The results showed, globally, that higher financial balance leads to higher company return. This is observed for the national companies, which obtain higher finance balance and profitability. On the other hand, Portalegre companies show less finance balance and profitability than the national companies. This may be related to lower manageability (less finance balance) and greater risk aversion (less profitability) by Portalegre business managers.

**Research limitations/implications:** This work is based in accounting data. So, if the balance sheet and income statement are considered from a fiscal point of view, they may not reflect the true reality of the companies.

**Originality/value:** As far as we know it is the first study to analyse the financial balance and profitability relationship in the wine sector.

**KEYWORDS:** Financial balance, Profitability, SMEs, Wine sector.

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## Financial literacy in Portugal: Literature review and research proposal

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### ABSTRACT

**Purpose:** To present a literature review in terms of financial literacy in Portugal and carry out a research proposal for a detailed study on the levels of consumers financial literacy in Portugal and its geographical dependence and distribution.

**Design/methodology/approach:** In the first phase of the study it is developed a literature review in order to identify the main findings on financial literacy in Portugal. In the second phase, a quantitative research would be carried out. It is applied an online questionnaire, which is based on a previous one developed by OECD/INFE in 2018. This is followed by an own statistical analysis of the results which will show the cross correlations between the levels of knowledge and their geographical dependence. Graphics representing the features found in the data analytics will be produced.

**Findings:** The result should indicate whether there are different levels of financial literacy between the geographical areas of Portugal.

**Research limitations/implications:** The limitations comprise, among others, not reaching a fraction of the consumers because of their lack of knowledge in reading and writing, as well as those without internet connections or knowledge. Consequently our assessment would be incomplete because only a fraction of the target consumers will address the questionnaires. Hence, this work may show a biased geographical distribution of the financial knowledge.

**Originality/value:** The outcomes of this work provide a detailed information on the levels of literacy by geographical area which can be used in the improvement of training policies.

**KEYWORDS:** Literacy; Investment; Savings; Education; Portugal.

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## Comparison of the level of disclosure of elements of statement of financial position of the PSI-20 entities

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### ABSTRACT

**Purpose:** The massive competition that operates in today's markets presents a positive contribution to the optimization of financial reporting, especially in companies that integrate stock indices. However, the way this information is disclosed may be affected by certain factors related to company. Considering the problem mentioned, this study aims to analyse the levels of disclosure of the components of the statement of financial position in accordance with International Accounting Standard 1 (IAS 1), through the compliance indices (CI) found for the companies of the Portuguese Stock Index (PSI) 20 in the sample of this study.

**Methodology:** For the research, the Reports and Accounts of 2012 and 2017 of the selected entities will be reviewed. Through descriptive statistics and multiple linear regression, the collected data are analysed the relationship between the CI and the variables: size of the board of directors, leverage, profitability, liquidity, type of auditing company, sector of activity and internationalization.

**Findings:** The results proved that the companies reveal an average CI of 73.30% in 2012 and 80.10% in 2017. It is also verified that the total CI has a positive and significant relationship with the variables of leverage, liquidity and type of auditing entity, which was not verified with the others. This confirms that these are the characteristics of companies that can affect the comparability of information.

**Practical implications/ value:** This study aims to contribute to the issue of disclosure and comparison of information by companies, when it concerns IAS 1 which applies to all entities applying IFRS as adopted by the EU.

**KEYWORDS:** Comparability, compliance rates, disclosure, IAS 1, statement of the financial position

## Comparison of static models in optimization of the determinants of the Portuguese SME capital structure

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### ABSTRACT

**Purpose:** This research aims to study the determinants of Portuguese companies' capital structure. These results can be useful: 1) as guidelines for capital structure optimization and 2) as a support for efficient decisions in what concerns to capital structure. The literature shows that classical determinants of capital structure present statistical significance and pursue the expected sign for different econometric models tested.

**Method:** The study follows a quantitative design research, with data collected in Amadeus from 500 SME'S in Portugal. The data spans from 2009 to 2018 totaling 4500 observations. We consider three dependent variables, i.e., total, medium and long term and short-term debt. In addition, we also employ seven independent variables (dimension; growth; liquidity; profitability; tangibility; profitability and business risk and singularity). We used a panel data approach based on fixed effects (FE) and of random effects models (RE).

**Findings:** We found that there is no significant divergence of the experimental results obtained in the OLS model, with the fixed effects model and the random effects model, and the expected signals for some independent variables are generally the hypotheses formulated. If we compared both econometric models, it is verified that regardless of the model used, or of the dependent variable analyzed, some of the independent variables are statistically significant in all analyzed models. Furthermore, we also found evidence that the same expected signals are in agreement with the standard financial theory. These empirical findings may suggest good indicators for making more efficient decisions about the determinants of the capital structure.

**Research limitations/implications:** The main contribution of this work is mainly in which econometric models had best results (according to existing theories) to analyse capital structures of companies. We found that the econometric model chosen for the analysis of the variables must be analysed insofar as some of the independent variables are sensitive to the expected signal and statistical significance, depending on the selected model.

**Practical implications:** These findings will be very useful to top managers in the process of deciding the optimal structure of capital without neglecting the long run financial sustainability of the companies.

**Originality/value:** This study is different because go beyond the classical capital structure determinants and also shows a comparison between different econometric models.

**KEYWORDS:** Debt, capital Structure, econometric models, expected sign, statistical significance

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## *Jornal de Contabilidade* of the Portuguese Association of Accounting Technicians (APOTEC): A bibliometric analysis of the literature on ethics, deontology and accounting profession (2010-2019)

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### ABSTRACT

**Purpose:** Portuguese Association of Accounting Technicians (APOTEC), founded in 1977, is one of the oldest associations of accounting professionals. Its journal – *Jornal de Contabilidade (Accounting Journal)* – also founded in 1977, has provided valuable contributions to the accounting literature. The main objective of this paper, which consists of five sections, is to analyze the articles published on ethics, deontology and the accounting profession published in *Jornal de Contabilidade* in the decade of 2010 to 2019. This article includes a literature review section about the concepts of ethics and deontology and their application to the accounting profession. In doing so, the article provides an overview of publishing trends that can be useful to a business science reader in order to make his own future personal research choices.

**Design/methodology/approach:** This research was carried out according to the bibliographic method of investigation, using books, articles and master dissertations as secondary resources. The bibliographical method of investigation was combined with document analysis of the articles selected by the bibliometric analysis made in the journal in the period mentioned above, based on the terms ethics, deontology and accounting profession.

**Findings:** The bibliometric analysis suggests that only 15 papers were published on the theme ethics, deontology and accounting profession, which allows us to make a call for these topics to be further studied by Portuguese authors of accounting.

**Originality/value:** There are very few bibliometric analyzes conducted in Portugal on the theme ethics, deontology and the accounting profession. This study intends to fill this gap, since it is the first carried out in the *Jornal de Contabilidade*, the oldest Portuguese journal in activity.

**KEYWORDS:** APOTEC, Ethics, Deontology, Accounting, Bibliometric Analysis.

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# BUSINESS INFORMATION SYSTEMS & INFORMATION AND COMMUNICATION TECHNOLOGIES

#19

## A systematic review of the Industry 4.0 (I4.0) concepts and elements applied in biopharmaceutical sector

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### ABSTRACT

**Purpose:** Identify the state of the art regarding the implementation of I4.0 concepts and elements in the biopharmaceutical sector.

**Design/methodology/approach:** Considered a Systematic Literature Review including observational studies published until September 2019. The research explored the main scientific and periodical databases specialized in the areas of health, drug production and biopharmaceutical management.

**Findings:** Results showed a significant number of articles on the topic I4.0 in general, but few focused on the biopharmaceutical industry. Directing the search for this sector, in the traditional scientific bases (Emerald, Scopus, Science Direct and Web of Science) only 8 relevant articles were identified (considering pre-established criteria). In the specialized journals, 35 relevant documents were identified. Besides the recent dates of the identified publications, the fact that most are located in specialized journals reinforces the incipience in the sector. Among the identified documents, some reiterate this fact by comparing the implementation of I4.0 in other areas. The rigidity of regulatory systems and the very absence of scientific reports are considered limiting factors. On the other hand, several documents describe the benefits of I4.0 elements in the industry, especially related to efficiency, productivity, flexibility, sustainability and quality. Although the introduction of I4.0 in the biopharmaceutical sector is expected to generate more products available to the population, there is concern about the social consequences of automation related to employability.

**Originality/value:** The identified incipience opens opportunities for scientific publications that report and consequently encourage the implementation of I4.0 more strongly in the sector.

**KEYWORDS:** Industry4.0, Pharma4.0 and Biopharma4.0.

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## Industry 4.0 and knowledge management practices

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### ABSTRACT

**Purpose:** The purpose of this paper is to synthesize Industry 4.0's on knowledge management process and practices, and to explore the improvements that will arise from it. It also provides an idea of how to use approaches for enhancing the knowledge management process in Industry 4.0. The main objective is to highlight the role of the technologies that support Industry 4.0 in facilitating the knowledge management process.

**Design/methodology/approach:** The aforementioned dynamic suggests that a thorough analysis of the existing literature on the topics related to the subject is needed to better understand what Industry 4.0 is for and how it can support the knowledge management system. Despite the analysis of the literature on Industry 4.0, this study develops an approach that presents the importance of this new industrial system, especially its technologies in the knowledge management process. It outlines the way in which Industry 4.0's components are useful to overcome several stages of the process and improve the performance of the organization.

**Findings:** Findings reveal that Industry 4.0 is an important factor in the growth of various organizational management processes. Industry 4.0' components such as the Internet of Things (IoT), big data, cyber-physical systems (CPS), and Cloud computing play an important role in supporting the knowledge management process that contributes to the organization's performance.

**Research limitations/implications:** How to manage the knowledge process is one of the important questions that pursue organisations to investigate possible ways. In this context, this paper deals with the relationship between Industry 4.0's technologies and knowledge management. It provides an approach that covers the key technologies of this industry that can support managing knowledge in the organisation. It contributes to the literature of Industry 4.0 and knowledge management by examining the role of its technologies in acquiring, creating, storing, sharing and protecting knowledge. Despite opening a new perspective for academics, this study also has limitations. As the main contribution is conceptual, further empirical studies are needed to analyze the impact of Industry 4.0 on knowledge management.

**Originality/value:** Business models are evolving along with the growing globalization and technological advancement, thus increasing the need for creative knowledge management. This paper highlights the current trend in knowledge management related to industry 4.0 and its technology. It focuses on the effect of this Industry and, subsequently connected technologies in the knowledge management process. This paper is one of the pioneering studies which examined the role of industry 4.0 in the process of knowledge management. It discusses the connection between industry 4.0' technologies, mainly IoT, big data, cloud, and CPS and the knowledge

management process. Therefore, this study contributed to the literature by providing valuable insights into knowledge management through Industry 4.0.

**KEYWORDS:** Industry 4.0, Knowledge management, IoT, big data, Technology.

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## Startups Photostat: When numbers matter

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### ABSTRACT

**Purpose:** Across Europe Startup ecosystems have become a serious and inspiring movement to fight unemployment, stimulate the local economy, and promote innovation. Here we present a study on the development of the startup ecosystem in Portugal and Spain, focusing in (a) the potential risk by the investors, partners, shareholders, and employees, (b) survival rates after the incubation and during the incubation period, (c) rate of selling of the startups abroad and nationally, (d) geographical dependence of the formation of the startups, and (e) job creation.

**Design/methodology/approach:** Using published data on the different items referred above a detailed statistical study is carried out with an eye in looking into cross correlations among the factors that determine the creation, evolution and success of the Startups in the Iberian countries. A particular issue is the feedback onto the population through, among others, job creation, promotion of innovation, selling of goods, and financial return.

**Findings:** (1) Personal characteristics, education, networking, and past business experience influence a company's survival. (2) The survival of Startups over a long period of time is the reflection of a sound economical plan comprising investment and financial return without compromising the growth of the Startup. Those with financial problems often result in the default of their obligations, in the loss of suppliers and customers, in unemployment, and in funding, eventually leading to bankruptcy. (3) The combination of qualitative and quantitative variables helps to determine the evolution pattern of Startups and predict the better procedures to be implemented in order to foster their success.

**Practical and social implications:** The information on the current state of the Startup ecosystem and the evolution patterns of the Portuguese and Spanish Startups is of value for founders, investors, and policy makers in designing their actions and secure the sound development of Startups since their incubation.

**Originality/value:** This work provides the first to date vision of the Startup ecosystem in Iberia that can be used by entrepreneurs and investors in securing a strong and sound development of startups.

**KEYWORDS:** Innovation, Economy, Investor, Companies, Startups.

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## Market analysis - A classroom experience

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### ABSTRACT

**Purpose:** This article intends to describe the pedagogical practices that were carried out by students of the Administration of Advertising and Marketing course and of the Management course of the Polytechnic Institute of Portalegre. The work was developed in the curricular unit of "Markets and Commercial Negotiation". The objective of this pedagogical "experience" is to present an exhibition of the "state of art" of several national and international markets chosen by students.

**Design / methodology / approach:** The adopted methodologies aim at the development of several curricular activities, as well as the acquisition of new transversal competences, which enhance the autonomy of work attitudes, critical thinking, accountability and students' involvement in the presentation of solutions capable of achieving the proposed challenge.

**Findings:** The results of the evaluation of the learning obtained in this academic work in real context, revealed a greater expression of their creativity and confidence in the theoretical knowledge, resulting from the contact with the object of study; allowed the development of its market literacy and its analysis, as well as the construction of new transverse and didactic knowledge.

**Practical implications:** With the use of real study objects there are higher levels of motivation, concentration and involvement by the students, and consequently better results in the evaluation moments.

**KEYWORDS:** Markets, Analysis, Learning, Pedagogical practices

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## The impact of technology in distribution: Predicting autonomous vehicles acceptance and use

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### ABSTRACT

**Purpose:** Nowadays we are facing a digital era submerge in technology. Information technology is embracing every industry, causing significant impacts and leading to considerable adaptations. The distribution industry is no exception. This study aims to collect evidence supporting that distribution channels are still not benefiting from information technologies full potential. Furthermore, this investigation proposed to understand and analyse the factors that can influence customer mind-set towards technology, either positively or negatively, helping to predict technology acceptance and use more accurately. Moreover, in order to contextualize the impact of technology in distribution, this investigation approached a specific technological innovation, the autonomous vehicles, who promise to revolutionise distribution, particularly in terms of mobility. This dissertation intends to analyse autonomous vehicles growth and predict their impact in a global perspective and objectively in the distribution industry.

**Design/methodology/approach:** In this regard, an online survey was conducted, allowing the collection of most up-to-date information about distribution channels, in terms of efficiency and potentialities, in addition to collecting updated data regarding autonomous vehicles beneficial value, as well as, the drawbacks and concerns influencing the acceptance and use of this innovative technology.

**Findings:** Thus, it is conclusive that there is clearly a room for improving the current distribution channels, concretely in terms of technological improvements. Autonomous vehicles promise to be a key disruptive technology, however, they will take time to be implemented, as this technology is still being developed. Although, as soon as it reaches its full potential, it is expected that autonomous vehicles face a sudden massive adoption.

**KEYWORDS:** Distribution Channels, Technology, Acceptance and Use, Autonomous Vehicles

## Sentiment analysis: A literature review

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### ABSTRACT

**Purpose:** Sentiment Analysis (SA) or Opinion Mining (OM) is the field of study for a broader topic of Natural Language Processing. SA seeks to understand people's opinions, feelings, assessments, attitudes and emotions through text to generate knowledge and relevant information on a particular subject, in the business world with a greater focus on understanding the evaluation of products. We can often resume to an interpretation of attitude behind the text whether it is positive, negative or neutral. The growing importance of SA coincides with the growth of social networks, opinions, criticism, forum discussions, blogs, among others. With this exponential evolution of data has arisen the need to apply SA in almost all social and commercial domains, because opinions are key in almost all activities and are one of the influencing factors in human and social behaviors, beliefs and perceptions of our own choices. As the opinion is one of the main influencing factors in the people's choice has made the spectrum of analysis broader for organizations making this a very relevant topic these days.

This paper revealed that although there some advances for algorithms, techniques and frameworks to help SA implementations there is still a gap towards identifying benefits for business applications.

The need for a systematic review arises from the requirement to summarize all relevant information about application and creation of value for SA implementations in organizations.

**Design/methodology/approach:** Include the main method(s) used for the research. In order to draw a general conclusion about this phenomenon we will evaluate individual studies that could help us understand the main features of this field.

**Findings:** In summary, we learned that although there some advances for algorithms, techniques and frameworks to help SA implementations there is still a gap towards identifying benefits for business applications. We believe that the results of our systematic review will help to advance future studies to search for these gaps.

**Originality/value:** Summarize all relevant information about application and creation of value for SA implementations in organizations.

**KEYWORDS:** Sentiment Analysis, Opinion Mining, Text Mining, case study, application.



# TOURISM & HOSPITALITY

#9

## The non-habitual resident tax regime in Portugal: A tax incentive for economic development

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### ABSTRACT

**Purpose:** The non-habitual resident tax regime is particularly attractive, compared to other tax regimes, for foreign citizens who carry out high value added activities and want to live in Portugal. Portugal offers a set of tax incentives for foreign citizens who express interest in developing their activity in Portugal. The objective of this paper is to analyze the tax regime of the non-habitual resident for professionals who operate in various sectors of economic activity and who move essentially for tax reasons. We analyze the income earned by taxpayers who opt for this tax regime.

**Design/methodology/approach:** Given the diversity of situations, we proceeded to an analysis of the legal requirements for the attribution of this tax regime and then to the assessment of income taxation, considering its practical application.

**Findings:** This scheme is particularly attractive to people who operate in various sectors of economic activity and want to live in Portugal. Tax attraction is possible in two different ways: through the exemption method in eliminating international double taxation of foreign source income earned by non-habitual residents or through mitigated and proportionate taxation of certain income earned by non-habitual residents.

**Research limitations/implications:** The limitations of this work result from the diversity of situations and the difficulty in covering all possible scenarios, as well as the limitation of having sufficient information from other countries, which also apply this regime, to be able to make a comparative study and determine if Portugal is the country with greater fiscal attractiveness.

**Practical implications:** In practice, this article gives you a better understanding of the Portuguese tax regime, which can then be compared with other countries, and gives people all the information they need to make their best tax planning.

**Social implications:** This tax incentive can bring more economic activity to Portugal as long as this tax regime is known inside and outside Portugal. This is a tax regime that can have strong impacts on society if it is more favorable compared to other countries.

**Originality/value:** This paper analyzes the tax regime of non-habitual residents in order to attract more investors to Portugal and thus increase the economic activity of our country.

**KEYWORDS:** Non-habitual residents, foreign investment, tax benefits.

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## Tourist-literary visit: The museum houses of the writer José Régio

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### ABSTRACT

**Purpose:** Presently, literary tourism is a relevant economic and social sector, emerging as an exponential area that articulates knowledge and pleasure. This modality is based on visiting places related to literature, such as the scenarios where the action of a novel takes place or the houses of the authors. Thus, our objective is to highlight the relationship between tourism and literature by choosing José Régio (1901-1969), not only because his life was divided into Vila do Conde and Portalegre, where his two museum houses are located, but mainly because in 2019 the celebration of the fiftieth anniversary of his death began and its commemoration extends to the end of 2020.

**Methodology:** The study was based on spatial references and knowledge about these houses, also based on bibliographic research on tourism and literary tourism, proposing to readers and tourists the discovery of these inspiring places.

**Findings:** Being literature a different form of tourist attraction, it is possible to know the author's versatility through these memory spaces, promoting the dissemination of the Portuguese cultural heritage. This proposal thus contributes to the strengthening of local economies, not only by creating jobs, but also by promoting the improvement of the population's quality of life by stimulating social interaction.

**Originality:** This work therefore adds new data to tourism, diversifying the tourism offer with positive impacts on space conservation. Becoming an original product, it emerges as an alternative to mass tourism, by allowing the experience of a personalized and inclusive experience in these writing spaces, besides betting on its dynamization and favouring better knowledge about José Régio.

**KEYWORDS:** literary tourism, museum houses, José Régio

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## Gender differences on labour issues in hotel industry in the Algarve, Portugal: The perceptions of employees from two business groups

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### ABSTRACT

**Purpose:** This research sought to analyse gender differences in perceptions about labour issues held by female and male employees of hotel companies, a male-dominant working environment (Burguess, 2003; Ng & Pine, 2003). Issues such as job insecurity, organisational justice, work-family interface, career opportunities and leadership are addressed in this study.

**Design/methodology/approach:** A quantitative study based on the survey distribution to employees from two hotel business groups in the Algarve region, Portugal, is ongoing. So far near 200 employees have answered the survey.

**Findings:** The preliminary findings suggest that men and women have different perceptions on work-family balance (with women reporting higher conflict between the two life domains), and leadership (with women considering more than men do not like to have a woman as their leader). Perceptions on job insecurity and organisational justice seem similar between groups.

**Research limitations/implications** (if applicable): The data collection is ongoing, but hopefully results will be presented and discussed at the event. The collection of the several measures at the same time (transversal study) and source (employee) can increase common method bias.

**Practical implications** (if applicable): The findings will allow a clearer picture about gender issues in Algarve hotel industry. Being this one the main employers in the region, it is relevant to know how employees perceive these issues in their companies. Results from gender studies can be important for business decisions in search of better balance.

**Social implications** (if applicable): This research can help advance knowledge on gender issues in a relevant business sector. This knowledge can be relevant for future interventions promoting the implementation of sustainable development goals (SDGs) in the industry, including SDG 5 – Gender equality and SDG 8 – Decent work and economic growth.

**Originality/value:** This paper can be useful for hotel companies and other organisations to gain insights about gender issues in the business sector and improve their performance in such domains.

**KEYWORDS:** Gender issues, Work-family interface, Job insecurity, Organisational justice, Hospitality industry

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## Millennials perceptions, motivations and preferences on luxury ecotourism: A qualitative study with Portuguese tourists

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### ABSTRACT

**Purpose:** Explore millennials perceptions, motivations, preferences and characteristics about luxury ecotourism.

**Methodology:** Qualitative, through 9 semi-structured interviews with millennials born between 1980 and 2000, who consume ecotourism and luxury products/services with a diverse profile in terms of age, education and tourism experience. The sample had a purposive nature and participants were recruited with the help of researchers' social networks. The interviews lasted between 23 and 63 minutes, were transcribed and subject to theory-based content analysis.

**Findings:** The results confirm that millennial generation represents a potential target segment for luxury ecotourism. They suggest how companies can adapt offerings to take into account millennial preferences, characteristics, feelings, obstacles and motivations.

**Research limitations:** The main limitations relate to sample questions such as the participant selection method, size and its characteristics. The use of a qualitative approach that does not allow us to generalize the results, but which presents itself as an exploratory work on the theme of luxury ecotourism.

**Practical implications** It provides valuable clues to the development of marketing and communication strategies for the millennial ecotourism sector that is one of the engines of ecotourism and luxury tourism. It identifies sustainability as a trend, with ecotourism a special highlight in terms of growth and demand.

**Value:** Although studies on millennials have been extensively explored in Portugal, research on their relationship with ecotourism and luxury is still scarce. Presenting this work as an excellent scientific contribution that will allow companies to identify the motivations and behaviours of millennials in ecotourism.

**KEYWORDS:** Marketing, luxury marketing, millennials, ecotourism, luxury ecotourism.

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## Proposal to use Open Source technologies for tourism management

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### ABSTRACT

**Purpose:** This research aims to analyze the georeferenced tourist information bases of the region of Coimbra, Portugal through *Open Source* technologies as a possibility to generate a contribution to the various sectors of destination management.

**Methodology:** Methodologically, we seek to discuss public and/or private corporate interaction processes in building a relational *GeoPackage* anchored on *Web Gis Server* (QGIS Cloud), which uses the concept of SAAS (*software as a service*), dispensing the need to create a unique structure of *hardware*, *software* and human resources dedicated to the municipal GIS and that can be accessed on the sites and public applications.

**Findings:** The project proposes to use official data resources free of charge by the different levels of governments, and mainly, the data considered individual, generated by citizens and available in the exploiters *Google Maps*, *Bing Maps*, *Open Street Maps*, *Waze*, etc. that can be extracted, stored and distributed freely (Mateveli et. al., 2015). Thematic maps and classifications of information uses should enable the execution of geolocated cadaster and accompaniment processes and areas that view territorial ordering. Today, GIS is a powerful set of tools for identifying, storing, updating, managing, analyzing, and visualizing spatial data.

**Originality/value:** Thus, we prove that their incorporation into the daily life of people is already possible from the wide use of *laptops*, *smartphones*, *tablets* and other "*wearable technologies*" that helps to produce voluntary collaborative maps and information that demonstrate the decentralization of the process of production and control of spatial information.

**KEYWORDS:** Open Gis, management, tourism, planning, Open Data.

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## Quality of life and affective image as an antecedent of word of mouth by the citizen

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### ABSTRACT

**Purpose:** Inside territories, cities are looking for the best quality of life in order to attract more and more people. Therefore, a research model was developed in order to understand the effects of perception of the quality of life and the image of the territory in word of mouth of the residents.

**Design/methodology/approach:** We carry out a causal and cross-sectional analysis. Through a 177 sample citizen, we collected data between 2018 November and 2019 February through an online survey. The 5 point Likert scale items used in this study were adapted from revised authors (Gómez, Lopez & Molina, 2015; Macke, Casagrande, Sarate & Silva, 2018; Ruiz-Mafe, Bigne-Alcañiz, Sanz-Blas & Tronch, 2018). Through collected data, we tested the model with PLS-SEM methodology.

**Findings:** The results found that perceived quality of life by citizens influences the image of their city and, consequently, word of mouth. This study also presented the mediating role of the affective image of the city in the construction of Word of mouth.

**Practical implications** (if applicable): Residents are much more than people who live in a city, they are the ones who promote the city's image, they are the ones who profit economically and socially from the tourism development of their city. So, positive word of mouth is important for cities, so our study presents to the cities the need to create a high quality of life for citizens.

**Social implications** (if applicable): The high quality of life promotes a positive image of the destination and the consequence, through word of mouth, is a dissemination of the city for tourists.

**Originality/value:** Our paper presents a model that shows the relevance for cities to improve citizens' quality of life. High quality of life should be based on citizens' enjoyment and also enable them to develop their skills.

**KEYWORDS:** Quality of life, Affective Image, Word of mouth

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## Awareness and loyalty on travel agencies

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### ABSTRACT

**Purpose:** Travel agencies are creating more advertising space, more attractive prices and other conditions that attract customers to buy their travel. The positive relation that loyalty has with the results of organizations has been tested by numerous studies (Cossio-Silva, Revilla-Camacho & Vega-Vázquez, 2019). However, internet has transformed how people search and buy products and services. Therefore, our study aims to study the travel agencies loyalty and awareness in a change context.

**Design/methodology/approach:** We conducted a causal and cross-sectional investigation. The sample consists of 152 travel agency clients. Data were collected online between April 2019 and August 2019 through a questionnaire, with 5-point likert scale items, adapted from Bezerra and Gomes (2015) and Silva and Gonçalves (2016). With the collected data, we tested the proposed model through PLS-SEM using SMARTPLS 3.2.8 software and identified as antecedents perceived quality, satisfaction and trust on travel agencies.

**Findings:** The results show that company awareness and customer loyalty are influenced by perceived quality, customer satisfaction and trust.

**Research limitations/implications:** The answers to the questionnaire were that most of the answers originated in a single country.

**Practical implications:** It is important to note that organizations need to go through several steps to achieve customer loyalty. Therefore, the service that is provided to the customer should be the one promised to him at the time of sale, in order to be able to guarantee his satisfaction through the perceived quality. If the customer is satisfied with their purchases on travel agency, this will be a potential customer for the future of the company.

**Originality/value:** The model shows a conceptualization between quality, satisfaction, loyalty and awareness in the context of travel agencies.

**KEYWORDS:** Travel Agencies, loyalty, brand awareness

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## The effects of communication on customer loyalty to the local housing sector: A case study

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### ABSTRACT

**Purpose:** Currently, the tourism sector is one of the most relevant phenomena from a political, economic, environmental and socio-cultural point of view. It ceased to be seen exclusively as a synonym for leisure and started to play a role as a social agent in the societies where it develops. Given this scenario, and keeping in mind the importance of customer retention, the objective of this article is to study the influence of the relational communication variable on customer loyalty to the accommodation unit.

**Design/methodology/approach:** For this, based on the conceptual model, a study was carried out that included customer companies (employees of companies that stayed at least one night) of the accommodation unit, based on questionnaire surveys. In the empirical phase, 55 customer companies of Casa Maria Victória were surveyed, from a convenience sample.

**Findings:** The results show that communication and relationships are highly valued by guests, and are fundamental factors for their loyalty.

**Research limitations/implications:** This study examines the importance of communication in the relationship between accommodation units and customers; however the evaluation of the variables under study is done only from the customer's perspective, excluding the perspective of the other stakeholders involved in the process. In the future, the research should be followed to deepen the study of some more relational variables pointed out in the literature, as well as their various links in customer loyalty in the accommodation sector.

**Originality/value:** The present study offers a contribution to the accommodation units, by allowing to expand and enlarge the concepts learned, integrating and crossing them with other realities, namely, with regard to customer loyalty, and the positioning of the accommodation units.

**KEYWORDS:** Tourism, Local Accommodation, Relational Marketing, Communication, Loyalty.

# HEALTH & QUALITY OF LIFE & COMMUNITY PSYCHOGERONTOLOGY

#24

How to promote transcultural nursing competences through multicultural learning strategies – the TC-Nurse Erasmus+ project

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## ABSTRACT

**Purpose:** The TC-Nurse, Transcultural Nursing: A European Priority, a Professional Responsibility (2018-2021) is an Erasmus+ project involving Higher Education Institutions in Portugal, Spain, Belgium and Turkey, conceived to promote transcultural competence in nursing students and healthcare professionals.

**Design/methodology/approach:** Assuming the increasing relevance of educating healthcare professionals to work in multicultural contexts and addressing patients' different cultural beliefs often using a second language, the project designed an original model - the Cultural Competence in a Multicultural Environment (CCMEn) model -, which rests on three pillars, namely, research on models and approaches for implementing cultural content in the nursing curricula (Papadopoulos, Tilki and Taylor, 1998; Banks, 2001; Campinha-Bacote, 2002); the Content and Language Integrated Learning (CLIL) educational approach and Coyle's (1999) 4 C's; and the concept of Social and Emotional Learning (Frydenberg, Liang, & Muller, 2017) to support the creation of a positive learning environment.

**Findings:** Preliminary results from data collected (focus groups, interviews, questionnaires) during the CLIL teachers training course and the one-week nursing students' international intensive training programme (year 1) indicate that the academic, linguistic and socioemotional support provided by the CCMEn framework enhances students' learning in a multicultural environment and their knowledge of skills leading to a culturally mindful behaviour and practice.

**Originality/value:** Besides contributing to enhance students' learning in multicultural contexts, using a second language, the CCMEn model is potentially transferrable to other contexts (hospitality, tourism, management), even in less diverse settings (concerning issues of age, gender, sexual orientation, religion, professional background) and through the students' mother tongue.

**KEYWORDS:** Transcultural Nursing, CLIL, Cultural Competence in a Multicultural Environment (CCMEn), Transcultural Education

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## Promoting successful and healthy aging through the website of proximity to the community

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### ABSTRACT

**Purpose:** In health and illness, it is necessary to have the knowledge and to know how to act accordingly. It is important to have an ability to obtain, select and process health information, that is, to have health literacy. The process of aging and health literacy shows that more knowledge and education are linked to more health and successful aging (WHO, 2015). Professionals involved in the aging process, policymakers and community play a decisive role in making "Ageing in place" a reality (Fonseca, 2018). One of the aspects to be considered in this process is information on aging, which meets the needs of the elderly and empowered them to decide in this area (Mcmellon & Schiffman, 2002). The present study aims to organize information on active and healthy aging in order to be accessible to the community, contributing to the construction of positive visions and attitudes towards aging.

**Design/methodology/approach:** This study uses a project management methodology for building an accessible aging website. The documentary analysis of the studies and practice on aging, health and well-being was the starting point (Faria, Faria & Lozano, 2019).

**Findings:** The "ODEA-IPBeja Community Proximity Website" is a platform that brings useful information in the area of aging at local and global level and enabling the promotion of successful and healthy aging. It is a tool that is available through a link: <https://odeaipbeja.wixsite.com/odeaipbeja>

**Research limitations/implications:** We are in the process of providing useful information on aging. The next step will be to evaluate the impact of this tool on the elderly, aging professionals and the community.

**Originality/value:** This paper emphasizes the Information and Communication Technologies benefits in aging and healthy literacy in a south Portugal (Alentejo) region that is frequently described as an elderly community.

**KEYWORDS:** Aging, Aging in Place, Health Literacy, Knowledge Aging, Information and Communication Technologies

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## COM\_VIDA (WITH\_LIFE) Active Aging, Health Promotion and Wellness

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### ABSTRACT

**Purpose:** Today we know that we have to invest in "Aging in the Place", that is, enable the development of favorable and facilitating contexts of aging that allow the promotion of the well-being of the older people (WHO, 2015; Fonseca, 2018; Jivraj, Nazroo, Vanhoutte, & Chandola, 2014; Panitsides, & Papastamatis, 2013). The COM\_VIDA Project (WITH\_LIFE) is a social innovation project, applied to the Impact Partnership Program, Portugal Social Innovation. This project is intended for the elderly population from the age of 65 years old, living from the municipality of Beja. The main objective is to encourage the elderly to adopt healthy lifestyles by promoting active aging with health and well-being.

**Design/methodology/approach:** This study uses a project management methodology. The intervention model was planned for four priorities of action: Monitoring of health, quality of life and well-being; Creation of individual plans to promote active aging, health and wellness; Promotion of activities leading to healthy lifestyles; and Promotion of social activities that promote mental health and prevent dementia.

**Findings:** A direct impact on the improvement of the quality of life and well-being of the elderly population of the municipality of Beja was observed through the activities developed (promotion of physical activity, cognitive stimulation, eating behavior and intangible cultural heritage), reinforcing self-esteem and appreciation of senior community.

**Practical implications:** Started in December 2018, it has a multidisciplinary team for the holistic approach, proximity response, accessible, egalitarian and empowerment of older people. It is implemented in the 12 parishes of the Municipality of Beja, involving more than 400 users.

**Originality/value:** COM\_VIDA is an innovative intervention response to the elderly and a strategy to promote active and healthy aging in the community.

**KEYWORDS:** Elderly, Aging in Place, Active Aging, Health Promotion, Quality of life

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Fonseca, A. (2018). Boas práticas de Ageing in Place. Divulgar para valorizar. Guia de boas práticas. Lisboa: Fundação Calouste Gulbenkian / Faculdade de Educação e Psicologia — Universidade Católica Portuguesa.

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## Flourishing and meditation in older people regular practitioners of yoga

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### ABSTRACT

**Purpose:** New perspectives and practical approaches to the field of positive psychology have been possible with the introduction of two developments that lead us to a new dimension of searching for a meaningful and fulfilling life: the concept of flowering; and the recognition of the beneficial effects of meditation and mindfulness practice as clinical and non-clinical interventions (Malinowski, 2013). Human flourishing allows us to analyze what leads us to cultivate talents, establish solid and lasting relationships with others, feel pleasure and contribute significantly to the world. That is, allowing us to grow as people (Seligman, 2012). Yoga allows people to live, as a whole, in a harmonious way. It is well known the benefits that a yoga practice has on the mind-body complex: physical postures, breathing, relaxation and meditation. The purpose of the study was to know the flourishing in regular practitioners of yoga of the Iberian Peninsula.

**Design/methodology/approach:** This was an exploratory, cross-sectional study of quantitative and qualitative methodology. The instruments used were: the Flourishing Scale (Diener, 2010) and an Interview designed for this research.

**Findings:** From the results it can be concluded that the group of participants is in a high degree of flourishing. Older participants recognize yoga's positive contribution to improving the quality of life, making new friends and engaging in physical and mental activity. All participants related the practice of yoga with 100% well-being; the relaxation and tranquility that meditation practice provides, the importance of having a physical activity, and the relationship with spirituality, positive emotions and happiness.

**Originality/value:** This study fit the approach of positive psychology and human flourishing as goals to be achieved. These results have an important impact on health, as positive emotions are associated with a longer and healthier life.

**KEYWORDS:** older people practicing yoga, meditation, active aging, human flourishing, well - being.

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## A technological overview on intervention projects in ageing population

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## ABSTRACT

**Purpose:** Given the new society challenges and the growing elderly population in Portugal, the promotion of active and healthy aging is a priority. Consequently, there is a need to create intervention programs and projects using digital and technological platforms, to promote the good practices in this area, as this is one of the main goals of the International Center on Ageing (CENIE). The objectives are the creation of a national registration database, the intervention programs / projects implemented survey in Portugal, the status verification of each project through available information and its characterization and detailed analysis of the interventions to identify good practice criteria in the development, implementation, evaluation and reporting process as well as the constant underlying technological update.

**Design/methodology/approach:** Ninety-six interventions, carried out between 2004 and 2018, were identified to contribute for improving the quality of life and autonomy of the elderly, carried out between 2004 and 2018.

**Findings:** Among these, the main themes are the fall prevention, physical activity promotion, promotion of intergenerational relations, healthy eating promotion, promotion of cognitive development and the promotion of socialization.

**Practical implications:** Suggestions for future investigations include the need to engage contact with entities, such as Health Center clusters and City Councils, in order to validate the existence of updated and innovative interventions, as well as to carry out a thorough evaluation, so as to characterize and describe interventions that promote attitude changes and good practice development opportunities with the purpose of increasing and extending quality of life in accordance with this new life cycle configuration.

**KEYWORDS:** active and healthy ageing, good practices, intervention programs, elderly population

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## Technology in the decade of healthy aging (2020-2030)

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## ABSTRACT

**Purpose:** The phenomenon of demographic aging appears in developed countries essentially due to an increase in longevity and a decrease in birth rates. This constitutes a challenge, due to the need for a balance between the definition of health promotion and social protection policies. The World Health Organization is preparing the development of a decade dedicated to healthy aging (2020-2030), where older people are at the center of concerted and sustained actions, in the face of the reality of increasingly long lives. In this context, this decade aims to build solid bases, with concrete actions, aligned with the 2030 agenda (Sustainable Development Goals), where the establishment of partnerships is essential for the development of a global change in the way we think, feel and acts against the elderly and aging. Evidence-based decision-making arises at the level of different sectors of society in optimizing the intrinsic capacity and functional capacity of the elderly, as well as in strengthening communities in response to the phenomenon of aging, with information and communication technologies being mentioned in this context. communication as essential.

**Design / methodology / approach:** We developed a Scoping Review where we systematized evidence regarding the understanding of the importance of information and communication technologies as promoters of healthy aging.

**Findings and Originality/value:** The evidence found demonstrates the potential of information and communication technologies in promoting personal training and improving the quality of life of the elderly, as well as favoring access and management of multidisciplinary health care, with the possibility of cost reduction.

**KEYWORDS:** Health, Aging, Information technology

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## Quality of life: “A World of Comfort” volunteer project

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### ABSTRACT

**Aims:** In post-modern societies population aging has led to several social and institutional changes and has enhanced the need for social innovations focusing on activities for the senior population. Innovations that promote healthy lifestyles, self-development, foster social interaction and reduce isolation or loneliness and promote well-being. Aiming to participate in the construction of a fairer society, by promoting quality of life and aging with dignity, the Association of Teachers of the Municipality of Almada (Apcalmada) has, since 2010, a voluntary project, named as “A Word of Comfort”, which is carried out at the home of the elderly by a total of thirty volunteers.

**Purpose:** To present good practices of voluntary social work which aims to diminish the absence or decline of associative and social interaction of non-active individuals. Practices that are related to the loss of interpersonal trust and self-esteem, avoiding their progressive isolationism.

**Design/methodology/approach:** Interventional/participatory method, which aims to provide moments of help, coexistence, reading and monitoring to elderly, dependent and secluded people who have chosen to remain in their homes.

**Findings:** The project has about thirty volunteers who regularly visit thirty-five users regularly in their own homes. Our main findings are that the project promotes social interaction and serves in part as formal support for the elderly.

**Originality/value:** This is a unique and innovative project, whose execution is articulated with other entities, such as: local authorities, central administration and public and private non-profit entities operating in their territories in the social area cooperate.

**KEYWORDS:** Voluntary social work; Active aging Isolation; Self-esteem, Affections

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## The urgency of emergence services: the frequent users of a medium Portuguese hospital

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### ABSTRACT

**Purpose:** Healthcare management systems are undergoing dramatic changes. These changes are being driven not only by progress in medical technologies and procedures, demographic pressures such as population aging, and financial constraints but also due to misuse of the health care facilities. An example of the misuse of healthcare facilities in the hospital emergency service (ES). In this study we attempt: first to characterize the frequent users of the ES of a Portuguese public hospital; second to determine the direct costs for the misuse of the emergency service of the same unit for the period between January 2016 and December 2017.

**Design/methodology/approach:** A quantitative, cross-sectional and descriptive study was conducted for FU (> 4 episodes/year) of the ES of a Portuguese public hospital between January 2016 and December 2017. Sociodemographic data were obtained and associations between variables were tested.

**Findings:** The frequent user is a female, resident in the municipalities near the hospital, most of them with the assigned family doctor. The frequent users of the ES were not urgent, 76 % of the sample used were identified with the Manchester screening as greens and blues, 4,45% of the patients admitted are responsible for 1 7% of ES. These findings are in line with other studies. The direct costs for misuse of ES were reflected in the amounts paid per episode to the hospital unit. The episodes that exceeded the contract program for the period in question were paid 5€ instead of the €50/episode.

**Research limitations/implications:** Only data related to general urgency were analyzed. This is a cross-section study and a longitudinal study by the need for this population, to realize if there is or not change in the behavior of the frequent users for a given period.

**Practical implications:** This study contributes to better decisions taken by health management once they have at their disposal of better information.

**Social implications:** The study findings make clear the need for an integrated and coordinated response of the different levels of care.

**Originality/value:** Identifying FU of an ES enhances the implementation of intervention strategies to minimize the improper use of ES.

**KEYWORDS:** Frequent users, Emergency Services, Public Hospital, Direct costs.

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## A systematic literature review of the quality of working life and employee outcomes

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### ABSTRACT

**Purpose:** The quality of working life (QWL) research field dates back to the 1970s and has grown considerably since that time. At an individual level, positive outcomes of QWL include reduced absenteeism, lower turnover, improved job satisfaction and improved individual productivity; however, few studies have systematically analyzed all the employee outcomes associated to QWL.

**Method:** The systematic literature review methodology is used herein with the aim of identifying the employee outcomes associated with the QWL construct. More specifically, the article explores research studies that have examined QWL and its consequences for individuals in a given organizational setting. Since our focus was to gain insights into the empirical investigation about QWL, we exclude studies with a primary focus on model development or testing measurement instruments. Extensive research was conducted using the PROQUEST and EBSCO databases. On both databases, the following terms were included: quality of life at work, work-related quality of life, quality of working life, working-life quality. Only the work-related consequences of QWL were considered. The search was limited to peer-reviewed articles published in the English language between 1970 and 2017.

**Findings:** The results show how a higher level of quality of life at work can improve several relevant employee outcomes at work.

**Value:** This work corroborates previous studies confirming the linkage between QWL and employee outcomes and organizational commitment was found to be the most relevant employee outcome. Other core outcomes are job satisfaction, turnover intention, and burnout. These findings are consistent with those of previous studies

**KEYWORDS:** Consequences, outcomes, quality of working life, systematic literature review

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## Passion, motivation and subjective well-being in adapted sport

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### ABSTRACT

**Purpose:** Adapted sports practice has increased considerably in recent years; however, few studies have focused on examining the effect of passion and motivation on subjective well-being. This study aimed to analyze a hypothetical model integrating constructs of the Dualistic Passion Model and Self-Determination Theory, examining their relationship with subjective well-being in a sample of adapted sports athletes.

**Method:** For analysis, 143 athletes aged between 15 and 59 years ( $M = 29.21$ ;  $SD = 10.45$ ) were recruited. Competitive practice ranged from 1 to 28 years ( $M = 5.55$ ;  $SD = 6.98$ ) and weekly workouts between 1 to 12 sessions ( $M = 4.52$ ;  $SD = 2.71$ ). Data were collected using a multisection survey, and structural equation modelling procedures were applied for examining correlational associations between constructs. Descriptive statistics were performed using IBM SPSS STATISTICS 20.0 and the structural equation model was performed using EQS 6.1.

**Findings:** The data support the adequacy of the hypothesized structural model:  $S-B\chi^2=475.521$ ;  $df=406$ ;  $p<.001$ ;  $SRMR=.080$ ;  $NNFI=.917$ ;  $CFI=.925$ ;  $RMSEA=.046$  (.033-.057). The fact that athletes feel passion for the practice of their modality can be a positive predictor of self-determined motivation, which can therefore influence higher levels of well-being, as well as cognitive (life satisfaction) and emotional (positive affects) outcomes.

**Originality/value:** The data contribute to the understanding of some variables related to adapted sport, allowing to outline recommendations, based on the identification of strategies for the increase and maintenance of sports practice.

**KEYWORDS:** Passion, Behavioral regulation, Subjective well-being, Adapted sport

## Impact of social discharges on the national health system

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### ABSTRACT

**Purpose:** Social discharges have translated into high costs for the national health system, reducing health gains and making the system increasingly inefficient and unsustainable. This problem cuts across many European countries and has been aggravated by demographic ageing and the increase in average life expectancy.

**Design/methodology/approach:** To identify the available evidence about the impact of these social discharges, a narrative literature review with analysis of relevant articles and reports on the subject was conducted, recurring to CINAHL and MEDLINE databases. The articles were selected with the following criteria: 1. Full-text articles; 2. Peer-reviewed articles. 3. Articles published between 1999 to 2019. We decided 5 of the 45 articles presented.

**Findings:** It is clear from the literature that, notwithstanding the evolution of the system and the National Health Service, as long as the sociodemographic trend is not contradicted, we will continue to have high costs for the public purse. At the same time the findings allow us to validate that, despite the creation of the National Network of Integrated Continuing Care, although much lower costs internally compared to the hospital context, it cannot still respond to the needs of the population.

**Practical implications:** It is concluded that is urgent the creation of more integrated continuous care units, focusing on short-term units, with a more considerable effort in the education of professionals that allows greater integration of the various levels of care is urgent.

**Originality/value:** This paper focuses on the cost-effectiveness analysis of hospital admissions, aimed at the intervention of health managers.

**KEYWORDS:** long term care; elderly; costs; discharge

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## The value of disease prevention: Some considerations

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### ABSTRACT

**Purpose:** It's commonly accepted that the paradigm of health care should be on prevention, however, the Portuguese Government only allocates 1% of the Health Ministry budget to prevention. This study aims to: 1) compare European and Portuguese politics in what concern to health care prevention; 2) understand the health gains associated with a National Health Programme for Brain-Cardiovascular Diseases (NPBCD).

**Design/methodology/approach:** a review of the literature was made, mainly reports produced by the European Observatory on Health Policies and Systems, from the Organisation for Economic Co-operation and Development in association with European Union and reports from the NPBCD.

**Findings:** The data analysed suggests higher per capita expenditures in the percentage of GDP from European countries than in Portugal. Portugal has better rates of life expectancy and avoidable deaths than European partners, nevertheless, it presents the lowest number of Healthy Life Years at birth and at the age of 65. When comparing the main causes of they are similar. A deep view of the NPBCD permit identifies a set of preventive measures that are directed to citizens, but also promotes the introduction of guidelines for health professionals to minimize the severity of the disease.

**Practical implications:** Research highlights that despite the lowest investment in Prevention, Portugal presents interesting figures in what concern to health gains. The investment in national health programmes for prevention centre in a particular disease has allowed reducing severe acute episodes, but there's an increase in indicators associated with morbidity.

**Originality/value:** this study permits to establish a basis for a reflection with health sector stakeholders and raise awareness for the effectiveness of preventive health programmes.

**KEYWORDS:** Disease prevention, health promotion, National Programme for Brain-Cardiovascular Diseases.

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## Healthier architecture: A contribute from nursing

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### ABSTRACT

**Purpose:** To identify the contributions that the nurses can make to the architecture of the health spaces to make them the most appropriate and sustainable as possible.

**Method:** We conducted a narrative review of the literature recurring to CINAHL and MEDLINE databases. The articles were selected with the following criteria: 1. Full-text articles; 2. Peer-reviewed articles. 3. Articles published between 1998 to 2018. We selected 10 of the 117 articles presented.

**Findings:** Nurses can provide valuable contributions following its practice and holistic view of the patient that may lead to health outcomes, not only for patients and their families but also for multidisciplinary teams working in the various contexts of care such as acute care, primary care and long-term care, improving the work satisfaction and reducing the turnover. Healthy healthcare environments are associated not only with better health outcomes but also with better management of human and financial resources.

**Practical implications:** it should be promoted a partnership and coordination between architecture and nursing, to help healthy environments for patients and professionals, working together to eliminate architectural barriers and investing in financial and ecological sustainability of spaces. Further studies are needed to support this evidence.

**KEYWORDS:** architecture, nursing, environment, healthcare, sustainability

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## Schizophrenia management in home treatment: The case of the local health unit of Guarda

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### ABSTRACT

**Purpose:** Schizophrenia is a serious chronic mental illness with significant repercussions on the quality of life, functionality, social and economic costs. Health providers, in some regions of Portugal, had implemented home treatment programs to remove schizophrenia patients from the hospital environment. The assessment of this program is must need.

**Objectives:** This research intended to evaluate the quality of life and functionality of patients with schizophrenia under home treatment and estimate the associated costs.

**Method:** In this cross-sectional observational study, Quality of Life (WHOQOL-Bref) and Personal and Social Performance (PSP) scales, validated by Vaz Serra et al. (2006), were applied to the population of patients diagnosed with schizophrenia and under home treatment in the district of Guarda (N = 65). The direct costs associated with this treatment (professionals, medication and vehicle) were also estimated.

**Findings:** The results revealed a predominance of mid-level quality of life in all domains and mean total PSP score of 58.38 (multiple disabilities). There was a positive significant association between the PSP functionality index and WHOQOL-Bref ( $r_{\text{spearman}} > 0$ ;  $p < 0.001$ ). The costs of home treatment were less than the costs associated with hospitalization.

**Value:** This research results show significant health gains to schizophrenia patients' in-home treatment and with lower costs of treatment. These results could help in the design of health care politics in what concerns the treatment of mental health.

**KEYWORDS:** schizophrenia, quality of life, functionality, schizophrenia-associated costs

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## Determinants of the healthcare private units' choice in Portugal: An exploratory study

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### ABSTRACT

**Purpose:** The decision-making process in choosing a private health provider (PHV) is complex. The vulnerable situation associated with the state of health leads individuals to deeply consider different factors in searching for a solution. The present study aimed to identify: 1) the main determinants of the individual choice for PHV; 2) those that are the most prevalent at the moment of choice and/or in the maintenance of loyalty.

**Design/methodology/approach:** The research methodology undertakes a quantitative, cross-section, exploratory and descriptive - correlation approach. The total sample is a 302 completed on-line questionnaire by actual or potential clients of PHV in Portugal.

**Findings:** Information on health units is mostly obtained through digital and social media. Speed of care, quality certification by international entities, agreements with health systems, diversity of supply, the reputation of the institution/brand, cost were the main factors identified as influencing the choice of individuals. Regarding the change of health unit, the staff (administrative staff, operational assistants and nurses), comfort of the facilities, cost, empathy, diversity of service offered, speed of care, follow-up after discharge, proximity, were referred by the respondents as fundamentals in the decision-making process. Through inferential analysis, it was found that the determinants of choice, satisfaction, and change of health unit present statistically significant differences for variables as gender and monthly income.

**originality/value:** This study will contribute to the awareness of profile and determinants of choice of the clients of the PHV.

**Limitations:** This study uses a non- probabilistic convenience sample and for that results are only valid in the context of the study.

**Keywords:** Customers choice, health, management, private health units

## Clinical governance, leadership and health care quality: A scoping review

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### ABSTRACT

**Purpose:** The need to improve health care quality is one of the faces of the same currency that gives rationalization visibility and improves, also, the reduction of resources. Clinical Governance provides a framework for assessing and improving clinical quality and the most appropriate use of resources by creating an environment conducive to excellence. Leadership as a quality assumption is an important contribution to achieve the best health outcomes and better health care quality. Identifying the relationship among clinical governance, leadership and health care quality.

**Design/methodology/approach:** Development of a Scoping review by Joanna Briggs Institute (JBI) with the question: "Does clinical governance and leadership influence health care quality? The question was based on the elements of the PCC (Population, Concept and Context). The search expression: "Quality of health care" AND "leadership" OR "clinical governance". All descriptors MeSH. Research on the EBSCOhost platform (CINAHL, MedicLatina, Medline and Nursing & Allied Health Database). 5-year chronological drawing (2015-2019). Based on JBI PRISM we select the found articles. In analyzing the reliability of the selected articles, we mobilized the methodological evaluation instrument "DATA EXTRACTION INSTRUMENT".

**Findings:** In the synthesis of the results, the evidence demonstrates the need for a design focused on the efficiency and effectiveness of health care, awareness and control. Clinical governance plays a central role in determining the continuous improvement of the quality of health care.

**Conclusion:** The scoping review allows mapping the outcomes of the studies identified through a transparent process.

**Originality / value:** Clinical Governance it achieved health gains by improving quality of health care.

**KEYWORDS:** Clinical Governance; Health; Leadership; Organization and Administration; Quality of Health Care;

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## Creating value in health institutions through a different approach to the wasteful management of resources

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### ABSTRACT

**Purpose:** Health management is challenging given the demands of technological change and financial constraints. Health units exist to add value to their stakeholders by meeting their needs. Reducing non-value-added costs, reducing waste, or improving the standardization of procedures, is a challenge for all healthcare facilities. This research intends to: 1) identify factors that could compromise the sterile condition of reused medical devices by different users in a hospital; 2) identify opportunities for improvement, namely in storage and maintenance; 3) perceive the opinion of different professionals about the methodology adopted in the initial phase of implementation of the project.

**Method:** The study was designed and implemented in a medium-sized Portuguese health unit. It uses an exploratory, quantitative and qualitative approach applied to 21 services. Data was collected during 21 visits, through 26 observations during the period between November 12, 2018, and January 24, 2019, and also by a semi-structured interview and focus group.

**Findings:** The results highlighted that: 1) only one legal recommendation was found to be complied with in 100% of cases, i.e. hygiene conditions, although they did not comply with the requirement for an exclusive warehouse for sterile devices; 2) there is an opportunity to combat waste through the development of up-to-date inventories and improvement in the storage of sterile reusable medical devices, by changing the methodology by which these devices are stored.

**Value:** The study design has characteristics that allow replication and comparison; the research was applied to all departments of the hospital and focused on the storage of reusable medical devices.

**KEYWORDS:** Health management, Wasteful Management, Medical Devices, Reprocessing



# SUSTAINABILITY & CORPORATE SOCIAL RESPONSIBILITY & BUSINESS ETHICS & SOCIAL ECONOMY & SOCIAL WELFARE

#20

The ethics of tax evasion: A study addressed to professors and students of higher management and non-management courses

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## ABSTRACT

**Purpose:** The purpose of our study is to determine the depth of various arguments that have emerged to justify tax evasion as an ethical procedure.

**Design/methodology/approach:** Data collection was done using a questionnaire addressed to professors and students of higher management and non-management courses. This instrument was based on the 18 statements reflecting the three views of tax evasion ethics used by McGee & Benk (2011). Using a 5-point Likert scale, it is intended to evaluate (1) whether the arguments contained in the statements have an effect on the perception of tax evasion as an ethical procedure and (2) whether the previous effect varies according to age, gender, bachelor degree and income level. A universe of 406,980 individuals was determined using official information (sample: 384 individuals). Principal Component Analysis was used, as well as the Kaiser-Meyer-Olkin Statistics in order to measure the adequacy of the input matrix.

**Findings:** After the extraction of the components three variables were identified: "Always Ethical", "Waste, Corruption and Injustice" and "Discrimination and Oppressive Regimes" (Cronbach's Alpha results: 0.887, 0.85 and 0.862). "Discrimination and Oppressive Regimes" is the one that has values closest to "totally agree" that tax evasion is ethical. In general, older men with higher incomes tend to disagree about the ethics of tax evasion.

**Originality/value:** The originality of the study is reflected in the controversial relationship between Ethics and Evasion and the source of the data collected. Interacting with professors and students allows the business and academic components to be combined.

**KEYWORDS:** Tax evasion, ethics, tax, management.

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## The sustainable development in Portuguese higher education institutions: An exploratory study of students' perceptions

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### ABSTRACT

**Purpose:** This study presents a descriptive and exploratory research about the understanding of sustainable development (SD) among public higher education institutions' students, in Portugal. It explores the student's perspectives about SD through the analysis of their attitudes, skills and experiences on the theme. Their knowledge about sustainable development goals (SDGs), and their opinion about the importance of SD as future professionals were also under consideration.

**Method:** The research design of the study follows a descriptive and exploratory approach with a quantitative reporting of results. It was used an on-line questionnaire, adapted from the National Union Students (2018), to obtain the data. A sample of 1257 students from the Portuguese public higher education institutions (HEIs) was obtained.

**Findings:** Students consider that HEIs can do more in terms of education for SD namely: (i) offer free SD courses/workshops; (ii) streamline/develop actions on SD; (iii) encourage volunteer actions in the community, and (iv) promote student participation in practical on-campus actions. Students also consider that secondary education was the educational path that most encouraged to think and act in ways that help the environment and people. Most students already have heard about SDGs and know what they are, however, only a small number of students are actively involved in activities organized by their HEI.

**Research limitations:** This research has a national scope.

**Social implications:** This study provides valuable insights for future implementation processes supporting the integration to sustainability in HEIs.

**Originality/value:** The study helps to better understand the students' perceptions about SD and the role of HEIs to improve it, namely in Portugal where the studies about the theme are scarce. The results could be used by HEIs to introduce the SD topics in formal and informal education, as well as to improve it integration on campus activities.

**KEYWORDS:** higher education institutions, perceptions, students, sustainability, sustainable development goals

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## Environmental sustainability: case study in retail companies (Médio Tejo)

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### ABSTRACT

**Purpose:** Sustainable development is defined as a development model that "responds to the needs of the present without compromising the ability of future generations to meet their own needs". There are 5 principles in which sustainability it should be based (United Nations Global Compact, 2014) - principled companies, strengthening society, commitment to leadership, transparency of companies and place of action. Thus, sustainability addresses three broad areas in economic, environmental and social terms. Retail companies have as their most visible part the products they sell in their stores, which they aim to present as sustainably as possible, both at packaging and at production level.

**Design/methodology/approach:** Consumerism and sustainability are two big words on the agenda. In recent decades, our society has become a consumer society. Then comes the notion of sustainable business development, associated with environmental factors, to maintain business production while minimizing environmental problems. However, in recent years consumers have been increasingly concerned about the environment. It is important for retail companies to create new strategies in order to be able to keep up with these issues without affecting their sustainable development. Green marketing is a broad concept that can be applied to good consumer or industry practices as well as various services (Polonsky, 1994). Retail companies are increasingly turning to Green Marketing through various environmental protection advertising campaigns. This strategy can even strengthen the reputation of the company towards its consumers. With this study we intend to evaluate if consumers choose these retail companies according to their environmental responsibilities, and if this choice influences the sustainability of this company. To this end, we used a survey.

**Findings:** According to Boztepe (2012) most studies conducted to date, it was observed that the relationship between green price and buying behavior was unfavorable. However, in the study carried out by these authors, we can see that society is increasingly willing to pay a higher price for a product if it is environmentally friendly. Regarding other research on the influence of environmental concern on consumers' minds, it was found that women are more susceptible to this issue (Carvalho, 2015; Mainieri, Barnett, Valdero, Unipan, & Oskamp, 1997). The survey from this study was applied to 267 consumers from all over the country in order to analyze their view on the

relationship of retail companies with environmental responsibilities. Of these answers, 185 (69.3%) correspond to females and 82 (30.7%) were male. The mean age of the participants was 37 years. Most of them have a degree and are workers. Almost all consumers were aware of the effects of climate change (98.5%). This awareness comes mainly from personal concern (63%) and media (22.81%). Regarding the knowledge of the measures taken by supermarkets to reduce environmental pollution 54.31% of respondents know it against 45.69%. For the respondents the measures taken by supermarkets against climate change are the reduction in the use of cardboard and plastic (41.38%) and reusable bags (32.41%). On the other hand, if supermarkets stopped taking action to combat climate change, respondents say they will stop going to this establishment (72.3%).

**Originality/value:** As this is an increasingly important issue for society, several studies have been conducted in which green marketing strategies are related to consumers' choice of purchase. Consumers now emphasize the need for reformulation of existing companies, focusing on environmental concerns and responsible behavior. As in any research, sociodemographic factors are very influential variants, referring to a study in which female consumers, young and with higher educational attainment, are more likely to adopt this environmental behavior. Which translates into a purchasing pattern aimed at environmental sustainability (Carvalho, 2015; Tilikidou & Delistavrou, 2008).

**KEYWORDS:** *Green Marketing, Environmental Sustainability, Social Impact*

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## Golunteer: Financially sustainable nature upkeep

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### ABSTRACT

**Purpose:** The purpose of this research is to come up with innovative and sustainable ways of meeting the need for nature upkeep in Portugal. As part of the “Mediterranean Basin” hotspot, Portugal is a country of high biodiversity richness (Myers et al., 2000); however, investment in the protection of nature accounts for only 28 M€, or 0.02% of public expenditure (Lei 71/2018, p. 6148). Such a situation produces environmental vulnerabilities that necessitate further involvement, notably by the social economy sector.

**Design/methodology/approach:** The chosen approach is to set up a social enterprise to carry out team building activities, paid for by medium and large companies with a social and environmental conscience. This takes advantage of the trend towards environmental sustainability, and the Portuguese economy’s present positive moment. There are several labour-intensive activities, including picking litter and planting trees, that improve nature and do not need any specialist knowledge. Contrary to traditional team building days, where people only have a good time, but nothing changes in the world, ‘Golunteer’ events would bring a real sense of accomplishment to our client companies’ staff and management.

**Findings:** The main findings are how such a social enterprise is at the same time so little capital-intensive and so profitable, reaching a net present value of nearly 200,000 € in five years, with an initial investment of 15,000 €.

**Value:** The value of this research is to create a business plan which demonstrates a financially sustainable way of meeting social needs via entrepreneurial thinking.

**KEYWORDS:** social economy; sustainability; social enterprise

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## Yoga and the level of satisfaction of its practitioners in a higher education institution

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### ABSTRACT

**Purpose:** The present work aims to study and present the results on the level of satisfaction of the academic community, in a higher education institution, on the practice / attendance of the “YOGA NO IPP” project classes. The objectives of this study are: to study the profile of the academic community in a higher education institution that seeks the practice of; evaluate the quality of communication developed in the dissemination of the activity; evaluate the facilities and space and operation of classes.

**Design / methodology / approach:** The universe of the study was the school community of the Polytechnic Institute of Portalegre and relatives of the same community, composed of 53 individuals. 23 questionnaires were validated. It was an online survey whose questionnaire was elaborated through the Google Forms program and sent to the mailing list of the students “Yoga no IPP”. The questionnaire consisted of three blocks of questions, with a total of 17 questions.

**Findings:** The overall conclusions are a remarkable satisfaction in the majority of respondents, in this practice, standing out the fact that this activity contributes in a very positive way to the well-being and reduction of stress levels, in the Portalegre Polytechnic Institute SCHOOL COMMUNITY. Social implications (if applicable): The practice of yoga by professionals working in higher education contributes significantly to their well-being and reduces stress levels.

**Originality / value:** The study contributes to the improvement of yoga practice, through the yogis' perception about the essential benefits in the exercise of this activity. The study corroborates other studies on the benefits of this practice by professionals related to higher education.

**KEYWORDS:** Yoga, Social Responsibility, Higher Education, Satisfaction.

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## Territorial governance and sustainable development in peripheral regions: economic and institutional challenges

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### ABSTRACT

**Purpose:** This research aims to investigate how territorial governance can induce sustainable development, bearing in mind the challenge of smart growth, lasting employment creation, decarbonization of economy and touristic valuation of intangible assets embedded in a certain territory. It is expected to be a contribution as critical reflection inspired on regional cases (the Tagus wine route and the River Sorraia's Valley hydrographic harnessing, in Coruche) focusing the competitiveness of a huge spatial agroforestry production system covering a significant part of the inner territory of Portugal.

**Design/methodology/approach:** The research methodology is based in literature review and direct observation, following a qualitative approach.

**Findings:** Trust locally constructed, based on the geographical proximity and social interaction, favors collective learning and coordination between economic actors and the various institutions – namely universities and polytechnic schools - to ensure social value through a sustainable management of renewable natural resources.

**Research limitations/implications:** This research lacks deeper data analysis, namely regarding to primary data sources. It is largely based in literature review and previous empirical studies, although it contains new considerations on the analysed theme.

**Social implications:** The implications are the recognition of higher education sector role to design a strategy of sustainable development for Tagus River watershed contributing with expertise and exemption for the establishment of renewed Territorial Pacts consistent with the territorial socio-economic reality.

**Originality/value:** It highlights the relevance of political decentralization towards to sustainable territories combining the economic valuation of natural and cultural heritage assets with empowerment of communities, challenging policy-makers, researchers and practitioners of regional policy to trust more on the regional actors (higher education sector), and vice-versa.

**KEYWORDS:** sustainable management, territorial governance, social value

## Youth's education for social entrepreneurship: outcomes and pitfalls of an applied project

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### ABSTRACT

**Purpose:** Nowadays the European Union's social policy, in overall, advocates that society must lead efforts to overtake its problems by self-regulation. In coherence with such perspective, our research analyses the impact of a pioneer educational project aiming to create social value through the governance mentoring. Empowering citizens implies a priori to develop educational resources, boosting competences related to management and demystifying some pre-assumed myths about social economy.

**Design/methodology/approach:** Our project consisted in designing an original program for the curricular unit "Citizenship and Development" and applied it to a Portuguese group of students enrolled in a school of basic education, located at a low-density municipality in the Center of Portugal, during the first scholar period (September to December) of 2019. We made three tracking surveys – implemented at the classes of 1<sup>st</sup> and 5<sup>th</sup> grades - to capture students' perceptions changes about social entrepreneurship. We also made interviews to classes' directors and to the dean to gather more information about their personal evaluation of project's effectiveness.

**Findings:** Data collected from both surveys allowed to: *i)* shed light on students' minds about the social economy organizations' relevance through theoretical and practical learning; *ii)* bring up comprehension and implementation of real actions of social entrepreneurship by young people.

**Originality/value:** The outcomes produced till now, through the comparison of the first and second surveys, as well as from the ongoing five social entrepreneurship initiatives lead by these students, are truly stimulating. The paper reports details and numbers as evidence of the effectiveness of the reported project and highlight the need to include this unit in mandatory schedule - especially in the scholar system in peripheral territories.

**KEYWORDS:** governance, social economy, entrepreneurship, education

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## Refood: One example of social value creation in the social economy sector

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### ABSTRACT

**Purpose:** This research aims to study Refood and its main social responsibility practices. Social responsibility is seen as a way to achieve the sustainable development of society and a fairer way to a cleaner environment. Organizations play an important role in "educating" human minds to develop an ethical conscience and become socially responsible. To achieve sustainable development greater investment is needed in human capital, in the environment and relationships with other stakeholders and local communities.

**Method:** The case study method was followed with data collection through documental analysis and the development of interviews. The interviews aimed to: (a) understand the dynamics of the organization's implementation of socially responsible measures and (b) assess Refood's motivations regarding social responsibility practices. Refood is an independent, eco-humanitarian, 100% voluntary, citizen-led community movement integrated into a Private Social Solidarity Institution, whose purpose is the recovery of food in good condition to feed people in need. Refood is community-oriented and operates from the community itself, without paying wages, with low costs and high levels of productivity, not owning assets or investments that do not serve its mission.

**Findings:** Based on the study, it was concluded that at Refood there are socially responsible and sustainability policies, directly related to its management model, which is based on its vision, mission, values, and pillars. Refood contributes to the creation of social value in several ways. The main one is the satisfaction of the basic needs of a group of people (mostly homeless or socially disadvantaged) using leftover food, in perfect condition, that would otherwise be wasted. In this way, Refood is an example of how social value creation can be achieved through sustainable social and environmental practices.

**Originality/value:** Refood is a practical example of social value creation in the area of Social Economy.

**KEYWORDS:** case study, corporate social responsibility, interviews, Refood, Sustainable development



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