



Ethics in Operations Research and Management Sciences: A never-ending effort to combine rigor and passion [☆]

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ARTICLE INFO

Article history:

Received 11 December 2008

Accepted 11 December 2008

Available online 4 January 2009

Keywords:

Ethics
Codes of values
Models
Analytical methods
Ethics committees
Good practice
Ethical decision-making
Values conflict
Complex systems
Institutions
OR profession

ABSTRACT

From practice to theory, we introduce a state-of-the-art stream of papers that promotes an inclusive and complementary consideration of both analytical methods and ethical values in Operations Research and Management Sciences (OR/MS). We suggest a perspective according to which, the consideration of ethics in OR/MS constitutes an enrichment of our discipline as well as a contribution to a more sustainable future in general.

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1. An introductory background

Although primarily trained in using applied mathematics in our academic research we, the editors of this Special Issue, were always passionate about ethical issues in Operations Research and Management Sciences (OR/MS).

By ethical issues we mean a wide range of concerns from environmental sustainability to social justice and human values.

It is our conviction that proper integration of such concerns in the mainstream of OR/MS constitutes an enrichment of our discipline as well as a contribution to a more sustainable future in general.

The issue then is to discover what “proper integration” actually means, and this is not unrelated to mentioning our

mathematical training. In fact, we believe that the traditional rigor and search for objectivity that has characterized OR/MS since its inception should not be seen as a barrier to the integration of ethical concerns, even if such concerns are particularly difficult to define objectively, to measure quantitatively, and to translate smoothly into practical prescriptions. In our experience, this is indeed not an easy endeavor. On the other hand, the richness of an inclusive and complementary consideration of both analytical methods and ethical values is worth the effort, if only for the sense of professional relevance and self-accomplishment it brings.

Considerations of ethical nature are far from being novel in management. For instance, sociologists such as Rakesh Khurana argue that the history of business education has rather shown a decline in the consideration of ethical values. Professional and moral ideals that once animated and inspired Business Schools would have been displaced by the perspective that managers are merely agents of shareholders, supposedly held accountable to the cause of share profits

[☆] Processed by Editor B. Lev.

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only [1]. A similar perception of this historical trend can be found in Amartya Sen, always keen to remind us that Adam Smith also wrote about moral sentiments as a legitimate and noble source of motivation [2].

It is nevertheless striking to observe how ethical discourses pervade this first decade of the 21st century. It appears the time is right to revisit the topic by calling upon our fellow scholars to give us a state-of-the-art perspective on ethics and OR/MS.

This special issue builds on earlier efforts such as the pioneering 1994 book edited by William Wallace [3]. As the reader will recognize, this heritage is shared by most contributors to this Special Issue, quoting from this book and actively building on it. Another apparent milestone is a workshop we organized at INSEAD in 2003 with a small number of colleagues, to reflect upon ethical issues in OR/MS. To a large extent this workshop followed a call by Jean-Pierre Brans to the members of the European Association of Operational Research Societies (EURO) to sign an Oath of Prometheus (a short description of which can be found in the article by Saul Gass in this Special Issue). Brans, with a lot of energy and enthusiasm, has promoted reflection and discussions on ethical values, by organizing small conferences and leading the EURO Working Group on OR and Ethics. This Working Group is now headed by Fred Wenstøp, who is also contributing a paper to this Special Issue.

In the next section, we introduce the sequence of articles in this Special Issue. We selected to start this issue with rather practical and institutional topics and to finish with articles exploring more philosophical considerations.

Even in the relatively small group of scholars writing about ethical issues in OR/MS, the reader will appreciate the variety of approaches, methods and recommendations. Clearly, ethics in OR/MS is not a mature field composed of a well-defined set of concepts, methods, prescriptions and a shared culture. However, it is filled with passionate researchers who spend genuine efforts to convey their commitment. We wanted this Special Issue to reflect this diversity and passion.

A second objective was to look for an integrative and coherent perspective that would give the reader a good sense of the state-of-the-art, assuming this would be useful to researchers and practitioners looking to better integrate ethical concerns in their work. We also hope this will be helpful to scholars interested in doing research on ethical issues, by giving them access to a vast range of up-to-date references and helping them identify potential avenues for research. Finally, we would be pleased if this Special Issue motivated some to initiate institutional and practical initiatives for our profession.

The final section of this introduction to the Special Issue presents our personal standpoint. We candidly share our synthetic views on the contextual, emotional and methodological dimensions of ethics in OR/MS. Again, our intention is to suggest a perspective that would help the different voices to be heard rather than to hand the microphone to one in particular. We would also like this work to motivate some concrete actions, at the level of the individual (such as, for instance, increased awareness, self-reflection,

increased psychological autonomy in ethical analysis, enhanced knowledge of specific emotional reactions) or at the institutional level (increased salience of ethics in journal statements, more presence in conferences, less tense communications, participatory discussions about ethical guidelines in societies, etc.). We hope that the reader will trust that we do not pretend to hold a monopoly on ethics in OR/MS but merely intend to share our commitment to a subject that is increasingly important, extremely complex and very fulfilling.

2. A state-of-the-art stream of papers

2.1. General presentation

Our collection of articles starts with papers from Saul Gass and Warren Walker about ethical guidelines, codes of conduct and generally accepted best practices. These articles answer questions like: which ones are used? how can they foster ethical behavior? we then follow with two practical applications: a paper from Antony Cooper, Hans Ittmann, Theo Stylianides and Peter Schmitz and one by John Brocklesby. These are examples of OR analysts who attempted to diligently follow their ethical concerns in specific studies.

After this first set of papers, the question arising is whether guidelines, codes and generally accepted best practices are sufficient to guarantee ethical behavior. In fact, it can be tempting not to look too closely at ethical issues when faced with an otherwise interesting and perhaps lucrative OR study, or when there are some strong time pressures. Would a Research Ethics Committee help in such cases? How could this be more than a way to outsource ethical issues so we do not have to worry about codes or due diligence ourselves? This is where Leroy White's article comes in, which stresses the importance of the context, arguing an outside committee could indeed be a real support at times, without being the ultimate solution.

One could say the articles so far present potential "safety belts" (a professional code of conduct, a personal checklist, an outside committee): they can all help avoid ethical traps to some extent and are therefore useful in some conditions. Perhaps all of them together constitute the best shield against ethical traps.

The next two papers, by Felix Rauschmayer, Iordanis Kavathatzopoulos, Pierre Kunsch and Marc Le Menestrel and Pierre Kunsch, Iordanis Kavathatzopoulos and Felix Rauschmayer clarify why good intentions and best practices may simply not be sufficient. Situations are frequently too complex, dynamic and plural in their values. Perhaps ethical considerations should be incorporated from the start, using less conventional OR methods.

The next article, by Fred Wenstøp and Haavard Koppang, argues that many problems have high levels of value conflicts. This contrasts with the popular belief that OR applications are mostly value-free. One may therefore perhaps argue that for problems with low value-conflict potential the safety belts discussed above are good enough, but in more complex situations and/or value-loaded applications they need to be supplemented by other safe-guarding measures.

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