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Scientific articles

Del Homo economicus al Homo moralis. Un diagnóstico divergente

From Homo Economicus to Homo Moralis. A Divergent Diagnosis

Economicus ao Homo moralis. Um diagnóstico divergente

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Resumen

Agentes económicos como los trabajadores son estudiados desde la racionalidad del *Homo economicus*, aunque su comportamiento debe entenderse desde la perspectiva moral-emocional del *Homo moralis motus*. Por tanto, el objetivo del presente trabajo fue establecer el nivel de competencia moral y emocional a partir de dos conceptos básicos, pero opuestos: la culpa y el orgullo. Para ello, se aplicó el cuestionario moral emocional a 212 trabajadores de una organización. Mediante el análisis estadístico descriptivo y de varianza, se encontró el nivel más alto de competencia moral en los trabajadores de base, mientras que el nivel más bajo se registró en los trabajadores eventuales. Esta investigación demuestra que, mediante el análisis de la competencia moral, se puede identificar el equilibrio moral emocional del trabajador. Por ende, se puede concluir que la evaluación del *Homo moralis motus* permitiría, potencialmente, observar y anticipar el correcto comportamiento del trabajador en una organización.

Palabras claves: agentes económicos, competencia moral, emociones, racionalidad, trabajadores.

Abstract

Economic agents, like workers, are studied from the rationality of *homo economicus*. Their behavior needs to be understood from the moral-emotional perspective of the *homo moralis motus*. The objective was to establish the level of emotional moral competence, based on two opposite basic moral emotions, guilt and pride. The Emotional Moral Questionnaire was applied to 212 workers from an organization.

Through descriptive and variance statistical analysis, the highest level of moral competence was found in grassroots workers, while the lowest level was registered in temporary workers. This research allowed demonstrate that, through the analysis of moral competence based on moral emotions, guilt and pride, the emotional moral balance of the worker can be identified. This is an evaluation of the *homo moralis motus*, which would potentially allow observing and anticipating the correct behavior of the worker in the organization.

Key words: Economic Agents, Rationality, Emotions, Moral Competence, Workers.

Resumo

Os agentes económicos como os trabalhadores são estudados a partir da racionalidade do *Homo economicus*, embora o seu comportamento deva ser entendido a partir da perspectiva moral-emocional do *Homo moralis motus*. Portanto, o objetivo deste trabalho foi estabelecer o nível de competência moral e emocional baseado em dois conceitos básicos, mas opostos: culpa e orgulho. Para isso, o questionário moral emocional foi aplicado a 212 trabalhadores de uma organização. Através de estatística descritiva e análise de variância, o maior nível de competência moral foi encontrado nos trabalhadores básicos, enquanto o menor nível foi registrado nos trabalhadores temporários. Esta pesquisa demonstra que, por meio da análise da competência moral, pode-se identificar o equilíbrio moral emocional do trabalhador. Portanto, pode-se concluir que a avaliação do *Homo moralis motus* nos permitiria potencialmente observar e antecipar o comportamento correto do trabalhador em uma organização.

Palavras-chave: agentes económicos, competência moral, emoções, racionalidade, trabalhadores.

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Introduction

The characteristics conventionally attributed to *Homo economicus*, such as being utilitarian, selfish, materialistic and rational (Maletta , 2010; Miedes and Flores, 2013), are reflected in economic agents, including workers, investors and organizations, in which frequently observes labor abuse, excessive use of natural resources and environmental pollutants, as well as executive manipulation to obtain promotions, which shows ethically questionable behavior (Terán-Bustamante, *et al .*, 2020).

In fact, *Homo economicus* is not usually a very trustworthy entity either, since in various circumstances it seeks to take advantage of itself because its only motivation is money or any good that represents monetary gain, hence requiring supervision and direct correction (Miedes and Flores, 2013). Based on this premise, Aguayo and Marchant (2021), Gavira -Durón *et al .* (2020), Flores-Romero and González-Santoyo (2018) support the application of ethics to improve the behavior of conventional *Homo economicus*, avoid the

harmful impact due to the use of natural resources, individual selfishness, seek values and moral principles, that is, forming a *Homo moralis* .

However, the supposed rationality of the purpose of *Homo economicus*, its maximum and own benefit, its tangible satisfaction in a material sense that leads it to pursue specific useful results (Maletta , 2010; Miedes and Flores, 2013), as well as its emotional subjectivity does not generated impartially, but rather through emotional ties with different social groups to which they belong and that are fully identified (Alfaro and Alvarado, 2018). In other words, economic agents are shaped by the emotional aspects of *Homo moralis* linked to their social circle (Alfaro and Alvarado, 2018). Consequently, Ford *et al.* (2018) and Hernández *et al.* (2020) propose studying and considering workers as *Homo moralis* . This means taking into account not only the role of maximum moral judge to punish them for their selfish and ambitious behaviors, as Alfaro and Alvarado (2018) suggest, but also considering the emotional influence of the social group to which the workers belong, whether as workers trustworthy, grassroots or with temporary contracts (Ríos-Manríquez *et al.* , 2015).

In this context, the principle of emotional moral competence is adopted, which depends on the balance between emotions and morality, and constitutes the basis on which the worker, as an economic agent, makes decisions and acts according to the emotions influenced by the *Homo moralis* (Bolívar, 2017; Gómez-Ortiz *et al.* , 2017).

Based on the above, moral emotions are considered to guide *Homo moralis* towards appropriate behavior, whether experiencing a painful or rewarding, positive or negative sensation, respectively (Conejero *et al.* , 2019; Haidt and Lukianoff , 2018; Huhtala and Holma , 2019 ; *et al.* , 2020; Waytz *et al.* , 2019). Regarding moral competence, Hernández *et al.* (2020) and Ford *et al.* (2018) have found that incorrect behaviors indicate limited moral competence, with poorly advanced reasoning and emotional development, which leads individuals to act unethically.

For this reason, this study hypothesizes that the moral competence, based on moral emotions, of trusted, base and temporary workers, varies depending on the work group to which they belong.

To analyze this hypothesis, the study is divided into four main sections. In the first, the traditional concepts of conventional *Homo economicus* are examined , as well as the alternative of *Homo moralis motus* and its relationship with moral emotions. In the second, the research methodology is described, which includes the procedure, the participants, the

instrument used and the hypothesis testing. The third presents the results of the study and its discussion and, finally, the conclusions derived from the research are presented.

From *Homo economicus* to *Homo socialis-moralis*

Homo economicus

Economic phenomena are the result of different actors, such as workers and organizations, who fit the figure of *Homo economicus*, which is characterized by being rational, selfish, utilitarian and materialist. Regarding this, it is believed that you can make precise calculations and obtain all the necessary information to achieve maximum personal benefit, without worrying about anything or anyone, but rather about your tangible and concrete satisfaction that leads to useful results (Maletta , 2010; Miedes and Flowers, 2013).

The worker like *Homo economicus*, therefore, seeks to maximize his personal benefit, which translates into a better quality of work life for him. This means that if the worker receives high monetary benefits, he or she will assume more responsibility and comply with the organization's rules and policies (Ríos-Manríquez *et al .*, 2015).

However, in the real world of organizations, the worker like *Homo economicus* does not always have all the information available. In fact, as an entirely rational individual, he seeks to foresee all the possible consequences of his actions, which results in a complicated and endless system to evaluate all the possible ramifications of his decisions and behaviors (Miedes and Flores, 2013).

For this reason, and recognizing this limitation, the idea of a complete and infallible rationality of *Homo economicus* is questioned (Alfaro and Alvarado, 2018). Furthermore, by examining its other assumptions, such as individuality and objectivity, it is understood that in the real economic environment workers make decisions influenced by their social interactions and the small groups to which they belong. These groups are not anonymous, but are made up of fully identified emotional social ties and relationships, which suggests an evolution towards *Homo moralis* .

Homo moralis

Flores-Romero and González-Santoyo (2019) state that morality is a characteristic of economic agents that is not explicitly considered. These authors suggest that morality, in one way or another, is linked to the decision-making of economic agents, hence it is even linked to the actions and functions, for example, of workers and investors. As can be seen, economic actors are *Homo moralis*, since they decide through the ties and rules that are assumed by belonging to different social groups in which they develop, and that are fully identified (Alfaro and Alvarado, 2018).

Therefore, *Homo economicus* is a *Homo moralis* that, according to Kohlberg's theory of moral reasoning (1964, 1968, 1976), is morally developed and educated, and has a cognitive base, with little or no attention to emotions, which shows every emotional expression of *Homo moralis* as a simple extension of the cognitive process.

Kohlbergian cognitive theory over *Homo moralis* has shown, through its verification in different cultures and populations, universal patterns in the stages of moral reasoning (Kohlberg, 1964, 1968, 1976). Kohlberg's (1992) theory of moral reasoning is based on constructivism and logical order, in addition to the assumption of the social role and the morality of justice, which seeks reciprocal balance between people. In this theoretical perspective, the constitution of the cognitive stage of moral judgment is distributed hierarchically according to the ages of the human being, from a preconventional level to the postconventional level (Pérez, 1997).

Furthermore, this predominant theory has been supported by the studies of Lind (2009, 2011), focused mainly on the rational part of the individual, which have confirmed moral judgment as a skill through the development of a specific questionnaire, the creation of a moral competence index and a method for discussing ethical dilemmas.

On the other hand, research in English by Rest *et al.* (2000) and Lind (2009, 2011), as well as in Spanish by Pérez (1997), Barba (2002), Barba and Romo (2005) and Robles (2010) are an example of the application of the six-stage model. morals of logical reasoning according to Kohlberg (1964).

However, it is important to highlight that moral judgment is influenced more by human emotions than by cognitive rationality (Haidt, 2001). In other words, a moral individual cannot be considered as someone entirely and rationally just, as Kohlberg proposed, but rather as an emotional *Homo moralis* (Greene and Haidt, 2002).

Homo moralis motus

The theory on *Homo moralis* has taken a theoretical turn, since Haidt (2001), among other authors such as Amorim and Sastre (2003), express great disbelief in such a predominant rational theoretical perspective due to the reconsideration of emotions and, especially, because moral action is caused more by the affective reflection than by the cognitive (Haidt, 2001). Thus, the constructivist theory of moral reasoning, which analyzes moral conflicts as dilemmas of justice, is necessarily obliged to prominently consider the emotional part in moral reasoning (Amorim and Sastre, 2003).

This theoretical perspective, based on the predominance of the affective structure, had already been considered by Jean Piaget (1984), who showed the use of said variable in the orientation of moral action. In effect, this theorist demonstrated that the individual's elementary emotional affections are not usually regulated from within, since it is external individuals who restrict their emotions. Piaget (1984) also assumed that there were only two types of actions (logical and affective) and that the child quickly acquires a basic moral structure about good and evil from the affective one (Piaget, 1984).

Furthermore, regarding the rules of distributive justice, LoBue *et al.* (2011) show evidence that the emotional response about the fairness of *Homo moralis* arises at very early ages (from three to five years old), that is, before the capacity for verbal argumentation. For example, in the case of receiving a smaller gift, disgust or anger at the inequitable distribution is part of the human moral affective construction (LoBue, *et al.*, 2011).

Finally, and from this same perspective of *Homo moralis motus*, Englander *et al.* (2012) find correlations between moral emotional stimuli and some regions of the brain. In this way, even in brain physiology, the aforementioned authors, together with Greene and Haidt (2002), found that emotions are a fundamental part of moral reasoning, specifically, of moral competence.

Emotional moral balance

As has been discussed, people's moral behavior does not depend so much on their cognitive capacity to make decisions based on rational morality and act according to perfect logic (Lind, 2009; Kohlberg, 1964), since what drives someone to act in a socially acceptable manner is their emotional balance (Bolívar, 2017; Gómez-Ortiz *et al.* , 2017). In this regard, several studies (Etxebarria *et al.* , 2018; Graaff *et al.* , 2016) have confirmed that this moral behavior is closely related to maintaining an adequate balance between positive and negative emotions (Conejero *et al.* , 2019; Haidt and Lukianoff , 2018; Huhtala and Holma , 2019 ; *et al.* , 2020; Waytz *et al.* , 2019). This means that moral competence, which involves making decisions and acting according to these basic emotions, is fundamental for adequate moral action (Bolívar, 2017; Gómez-Ortiz *et al.* , 2017).

Now, the emotions that direct moral action can be divided into basic ones, such as guilt (considered negative) and pride (considered positive) (Tomkins , 2008; Tracy and Robins , 2007), which function as rewards or punishments, depending on whether they generate a pleasant or painful sensation (Árdal , 1989; Sznycer, 2019).

Specifically, guilt arises when someone feels distressed about not having fulfilled some principle that they consider important. This painful feeling of failing is accompanied by the idea of being blamed (Freud, 1923; Mejía, 2002; Tomkins , 2008). On the other hand, pride constitutes a satisfactory, dignified and pleasant self-perception of having fulfilled some principle in an outstanding manner (Árdal , 1989; Kaufman, 1996; Tracy and Robins, 2007).

Taking into account emotional moral competence, as well as basic moral emotions (guilt and pride), it can be indicated that moral emotional balance is achieved when emotions are in harmony, which causes people to act correctly (Graaff *et al.* , 2016). On the other hand, when there is a moral emotional imbalance, this can lead the individual to look for the opportunity to act badly (Tracy and Robins , 2007).

Homo moralis motus and worker groups

Homo moralis motus tends to act in accordance with the group to which it belongs and the ties it has established with them. In the work context, this means that workers usually act according to their position within the company (trusted, base or specific work workers). As for the former, they have management, supervision and oversight roles, and maintain a close relationship with the employer authority (Ríos-Manríquez *et al.* , 2015). On the other hand, basic workers have a more stable employment relationship and usually have collective contracts. These can sometimes have a distant or even conflictive relationship with business authority, since they represent the majority in large organizations (Ríos-Manríquez *et al.* , 2015). Finally, workers hired for specific work or time have a temporary employment relationship, which is only activated when their service is needed or to replace another worker on an eventual basis.

Having explained all the above, the objective of this study was to determine the level of moral competence in the workers of an organization, with emphasis on emotions, for which the Moral Emotional Questionnaire was applied.

Regarding the hypothesis proposed, it suggests that moral competence, based on emotions such as guilt and pride, would vary depending on the type of worker: trusted, basic or hired for a certain period of time. To test this hypothesis, the following statements were formulated:

- Null hypothesis (H0): There is no difference in the mean levels of emotional moral competence, emotional moral balance and its emotional subindexes (pride and guilt) between trusted, base and temporary workers.
- Alternative hypothesis (H1): There is a difference in the average levels of emotional moral competence, emotional moral balance and its emotional subindexes (pride and guilt) between trusted, base and temporary workers.

Method

The approach of the present study was quantitative, with a descriptive, cross-sectional and non-experimental design. Likewise, this research had a descriptive and comparative scope. According to Hernández *et al.* (2014), descriptive research focuses on characterizing traits, while comparative research seeks to establish similar or different relationships between data sets.

Participants

212 workers from a university in the state of Tabasco participated in the present study, who were divided into four categories (table 1).

Table 1 . Participants by category.

Participants	Amount	Percentage
1. Subject teacher (determined time)	93	44%
2. Full-time teacher (basic)	52	25%
3. Administrative trust	27	13%
4. Administrative base	40	19%
Total	212	100%

Source: self made

Regarding age by category, in the case of subject teachers, there were 55 women with an average age of 47 years and 38 men with an average age of 46. In the *full-time teacher category* , there was one total of 52 participants: 20 female and 32 male, with an average age of 50 years.

The trusted administrative workers were 13 women with an average age of 41 years and 14 men with an average age of 46 years. As for the group of basic administrators, it was made up of 40 participants, 33 females with an average age of 44 years and 7 males with an average age of 42 years (table 2).

Table 2 . Average age of participants by gender and category

Category	Gender	Amount	Average age	Desv . Its T .
Subject teacher (temporary)	Female	55.00	47.25	7.63
	Male	38.00	46.66	9.33
	Total	93.00	47.01	8.32
Full-time teacher (base)	Female	20.00	50.20	6.34
	Male	32.00	50.00	7.92
	Total	52.00	50.08	7.29
Administrative trust	Female	13.00	41.62	9.94
	Male	14.00	46.79	8.28
	Total	27.00	44.30	9.31
Base administrative	Female	33.00	44.00	6.07
	Male	7.00	42.71	4.57
	Total	40.00	43.78	5.81

Source: self made

Instrument

The emotional moral test (EMT) has proven to be an effective instrument to quantify moral competence based on emotions, as suggested by Terán-Bustamante *et al.* (2020), who advocate the use of non-traditional questionnaires. In the case of Mexico, the EMT developed by Robles (2019, 2021) has confirmed theoretical and empirical validation in populations of different ages and regions of the country. This EMT evaluates the emotions guilt (6 items) and pride (6 items) through 12 items in order to determine the individual's moral competence through the emotional moral competence index (EMCI) and its respective subindices (SI) of moral competence emotional, that is, the SI-guilt and the SI-pride. In addition to the validity of Robles' CME (2019, 2021), a reliability analysis of the instrument was carried out by calculating Cronbach's alpha, which obtained an acceptable value (0.78).

Analysis of data

For data analysis, the participants' descriptive statistics were calculated, as well as the guilt and pride subindices. Likewise, the analysis of variance (ANOVA) of the different types of work and the subindexes was carried out to determine significant differences between the roles. Finally, in this statistical analysis the *software* was used Statistical Package for Social Sciences (SPSS), version 22.

Results

Descriptive statistics

According to the analysis of descriptive statistics, differences are observed in the guilt (SI-guilt) and pride (SI-pride) subindexes of the worker groups. For example, subject teachers recorded the highest value in the guilt subindex, while trustworthy administrators obtained the lowest value.

Regarding the pride subindex, basic administrative workers recorded the highest value, while trusted administrative workers obtained a lower value. In relation to emotional moral balance (EMB), it was observed that subject teachers recorded the highest value (13.08), followed by full-time teachers (7.56), which was close to the average of the entire population (6.27). . On the other hand, the value of the basic administrative ones was the lowest (0.01), with a significant difference compared to the average of the total population.

Regarding the index of emotional moral competence (EMCI), full-time teachers and basic workers registered the highest value, while fixed-term subject teachers presented the lowest value (table 3).

Table 3. Descriptive statistics of the *guilt* and *pride* subindexes , as well as the emotional moral competence index according to the work role.

job role	Statistical	Guilt-SI	Pride-SI	BME	EMCI
Subject teacher (determined time)	Mean	35.47	22.39	13.08	28.31%
	Std. Dev.	14.04	12.74	7..03	19.29%
Full-time teacher (base)	Mean	33.29	25.73	7.56	34.43%
	Std. Dev.	12.64	13.49	3..04	22.32%
Administrative trust	Mean	31.48	21.22	10.26	30.82%
	Std. Dev.	14.49	13.15	5.12	23.11%
Base administrative	Mean	32.04	32.03	0.01	31.06%
	Std. Dev.	14.77	13.79	0.00	20.15%
Total	Mean	35.75	29.48	6.27	32.00%
	Std. Dev.	14.23	14.13	2.28	20.31%

Source: self made

Variance analysis

Through the analysis of variance, it was found that in the pride subindex there is a significant difference ($p \text{ value} = 0.001 \leq 0.05$) between the different work roles, according to the significance value obtained. Regarding the guilt subindex ($p \text{ value} = 0.423$) and the emotional moral competence index (ICME) ($p \text{ value} = 0.403$), according to the significance value obtained ($p \text{ value} \geq 0.05$), no significant differences were found between the types. of workers (table 4).

Table 4. Analysis of variance

		Sum of squares	FD	Mean square	F	Sig..
EMCI	Between groups	.13	3	.042	.979	.403
	Within the groups	8.94	208	.043		
	Total	9.06	211			
Guilt-SI	Between groups	545.01	3	181,670	.939	.423
	Within the groups	40249.57	208	193,508		
	Total	40794.58	211			
Pride-SI	Between groups	3018.87	3	1006.291	5,794	.001
	Within the groups	36125.94	208	173,682		
	Total	39144.81	211			

Source: self made

Hypothesis demonstration

The hypothesis was partially demonstrated, since the analysis of variance revealed that there are significant differences between the diverse work roles with respect to the pride subindex. However, no significant differences were detected in the emotional moral competence index, as well as in the emotional moral balance and the guilt subindex.

Discussion

According to Agurto *et al.* (2017), a moral competence index between 30 and 39 reflects a high level; Therefore, it can be stated, based on the results found in this work, that this variable in full-time teachers is high. On the other hand, the lowest moral competence (EMCI) was found in subject teachers, which can be attributed to the activities of their role, focused mainly on teaching and not on supervisory tasks, which fosters a less emotional bond. close with the organization.

Finally, the analysis of variance revealed significant differences between work roles regarding the pride subindex. Specifically, rank-and-file administrative workers recorded the highest level on the pride subindex, suggesting greater satisfaction and self-confidence compared to other workers (Árdal , 1989; Kaufman, 1996; Tracy and Robins, 2007).

Conclusion

This research work focused on understanding the moral behavior of workers as economic agents, although from the perspective of *Homo moralis. motus* instead of the rational vision of *Homo economicus*. In this sense, the objective of establishing the level of emotional moral competence was achieved based on the basic moral emotions of guilt and pride in the workers of an organization. To do this, three groups of workers were analyzed: basic, trusted and fixed-term workers.

Regarding the research hypothesis, although it was not fully demonstrated, some significant differences were found between the groups of workers. Specifically, it was observed that in the pride subindex there were significant differences, since the trusted administrators showed the lowest level compared to the base ones, who had the highest value.

In addition, some non-significant differences were identified between the groups of workers. For example, it was found that the highest level of moral competence was found among rank-and-file workers. This also showed that their negative emotional state, measured by the guilt subindex, was balanced with their positive emotional level, represented by the pride subindex, and was close to the average emotional moral balance of the entire population studied.

Likewise, the finding that temporary workers exhibit the lowest level of moral competence suggests an imbalance in moral emotions, making them more prone to incorrect behaviors in the work environment. This information highlights the importance of considering not only technical skills, but also the emotional and moral state of workers, especially those in temporary roles or those with less job stability.

Finally, this research demonstrates that by analyzing moral competence through the emotions of guilt and pride, the worker's emotional moral balance can be evaluated. This represents an evaluation of *Homo moralis motus*, which could be useful for observing and anticipating the ethical behavior of workers in the organization.

Future lines of research

This study establishes an important foundation for future research that seeks to identify and prevent problematic behaviors of economic agents. In this sense, it can be indicated that by evaluating the moral emotional balance of these agents through emotional moral competence, strategies can be developed that promote appropriate behavior within the organization, which will contribute to creating an environment where economic agents act ethically and responsibly.

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