

CURRICULUM VITAE

Full Name: TERESA DA SILVA LOPES, Lic, MBA, MPhil, PhD

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<https://www.york.ac.uk/business-society/people/tlobes/>

Department, University: School for Business and Society, University of York

Present Position, Grade and Contract: Professor, Band 3, Full Time - Research and Teaching

Date of appointment to the University of York: 1 December 2008

Present Position

2008 – date Professor of International Business and Business History, The University of York

Previous Positions

- 1993 - 98 Lecturer in International Business and Strategy, Universidade Católica Portuguesa
- 2002 - 03 College Lecturer in Management, Brasenose College, University of Oxford; and Post-Doctoral Fellow, Saïd Business School, University of Oxford
- 2003 - 04 Lecturer in Management, Queen Mary, University of London
- 2004 - 07 Senior Lecturer in International Business, Queen Mary, University of London
- 2007 - 08 Reader in International Business and Business History, Queen Mary, University of London

Other Positions – Non-Academic

- 1990 - 93 Arthur Andersen – Consultant in Corporate Finance and Financial Auditing, Lisbon and London (Senior Consultant, 1992-1993; Experienced Assistant, 1991; Assistant 1990)
- 1989 Montepio Geral Bank - Business Analyst, Lisbon

Qualifications

- PhD Economics, The University of Reading (1998-2002)
- MPhil Business and Management, Universidade Católica Portuguesa (1995-1997)
- MBA with specialization in International Business, Universidade Católica Portuguesa (1993-95)
- 'Licenciatura' 5 year undergraduate degree in 'Business Administration and Management', Universidade Católica Portuguesa (1985-1990)

PhD Supervisors and Examiners

- PhD Supervisors - Professor Mark Casson, Professor of Economics, The University of Reading. Professor Geoffrey Jones, Straus Professor in Business History, Harvard Business School.
- PhD Examiners - Professor John Dunning, Rutgers University (external examiner); Dr. Robert Pearce, University of Reading (internal examiner).

Publications

i. Books and Reports

Authored Books

1. Lopes, Teresa da Silva *Internacionalização e Concentração no Vinho do Porto, 1945-1995*, Porto: GEHVID/ICEP, pp.171, 1999.
2. Lopes, Teresa da Silva, *Global Brands: The Growth of Multinationals in the Alcoholic Drinks Industry*, New York: Cambridge University Press, pp. 303, 2007.

Edited Books

3. Lopes, Teresa da Silva, and P. Duguid (eds.), *Trademarks, Brands and Competitiveness*, London: Routledge, pp. 248, 2010.
4. Lopes, Teresa da Silva, C. Lubinski, and H. Tworek (eds.), *Routledge Handbook on the Makers of Global Business*, London: Routledge, pp.598, 2019.
5. Lopes, Teresa da Silva, P. Duguid and R. Fredona (eds.), *Climate Change and Business: A Historical Perspective*, London: Routledge (forthcoming) 2025.
6. Lopes, Teresa da Silva (ed.) *Business History and Theory*. London: Edward Elgar (Under contract)

Edited Journal Special Issues

7. Fredona, Robert, Lopes, Teresa da Silva, and Reinert, Sophous 'Forms of Capitalism' *Business History Review*, Summer 2024.

ii. Chapters in Books

8. Duguid, Paul, and Lopes, Teresa da Silva, 'The company you keep: The port trade in the declining years of the wine Company, 1812-1840'. In Albert Vieira (ed.), *Os Vinhos Licorosos e a História*, Funchal: CEHA, pp. 285-309, 1998.
9. Duguid, Paul, and Lopes, Teresa da Silva, 'Divide and rule: Regulation and response in the port wine trade, 1812-1840'. In Gourvish, Terry (ed.), *European Yearbook of Business History*, No.3, Ashgate: Aldershot, pp.1-24, 2000.
10. Lopes, Teresa da Silva, 'Brands, mergers and acquisitions in the alcoholic beverages industry'. In Bonin, Hubert. *et al* (eds.), *Transnational Companies*. Paris: PLAGE, pp.15-34, 2001.
11. Lopes, Teresa da Silva, 'Os mercados de vinho do Porto'. In Gaspar Martins Pereira (ed.), *O Vinho do Porto*. Porto: Afrontamento, pp.131-150, 2003.
12. Lopes, Teresa da Silva, 'Instituições, sobrevivência e crescimento empresarial no vinho do Porto, 1960- 2006'. In Gaspar Martins Pereira, (ed.), *Douro Contemporâneo*. Porto: GEHVID/Afrontamento, pp.291- 303, 2006.
13. Lopes, Teresa da Silva, 'Corporate governance in the global alcoholic beverages industry'. In Susanna Fellman, Antti Kuusterä, and Eero Vaara (eds.), *Historical Perspectives on Corporate Governance*. Helsinki: The Finish Society of Science and Letters, pp.125-138, 2008.
14. Casson, Mark and Lopes, Teresa da Silva, 'Entrepreneurship, and the development of global brands'. In Mark Casson, (ed.) *Entrepreneurship: Theory, Networks and History*. Aldershot: Edward Elgar, pp. 264-287, 2009.
15. Duguid, Paul, Lopes, Teresa da Silva, Paul, and Mercer, John 'The first one hundred years of registration: shifting patterns in France, the United States, and the United Kingdom, 1870-1970'. In

- Teresa da Silva Lopes, and Paul Duguid (eds.), *Trademarks, Brands and Competitiveness*, London: Routledge, pp. 19-30, 2010.
16. Lopes, Teresa da Silva and Duguid, Paul 'Brands and Competitiveness'. In Teresa da Silva Lopes and Paul Duguid (eds.), *Trademarks, Brands and Competitiveness*. London: Routledge, pp.1-8, 2010.
 17. Lopes, Teresa da Silva, and Simões, Vitor Corado 'The Long-term impact of foreign direct investment on the Portuguese Economy: Addressing Silva Lopes' Competitiveness'. In Miguel St. Aubyn, Manuel Mira Godinho, and Joaquim Ramos da Silva (eds.), *Estudos de Homenagem a José da Silva Lopes*. Lisboa: Almedina, pp.511-555, 2018.
 18. Casson, Mark, and Lopes, Teresa da Silva, 'Foreign direct investment in high-risk environments: an historical perspective'. In Mark Casson (ed.) *The Multinational Enterprise - Theory and History*. Cheltenham: Edward Elgar, pp.283-307, 2018.
 19. Casson, Mark, and Lopes, Teresa da Silva, 'Foreign direct investment in high risk environments: a theoretical perspective'. In Mark Casson (ed.) *The Multinational Enterprise - Theory and History* Cheltenham: Edward Elgar, pp. 283-307 2018.
 20. Casson, Mark, and Lopes, Teresa da Silva, 'Imitation, brand protection and the globalisation of British business'. In Mark Casson (ed.) *The Multinational Enterprise - Theory and History*. Cheltenham: Edward Elgar, pp. 112-135, 2018.
 21. Lopes, Teresa da Silva, Lluch, Andrea, and Pereira, Gaspar Martins 'Imitation and the Case of the Global Wine Industry'. In Teresa da Silva Lopes, Christina Lubinski, and Heidi Towrek (eds.), *Routledge Companion to the Makers of Global Business*. London: Routledge, pp. 502-515, 2019 2019.
 22. Lopes, Teresa da Silva, Lubinski, Christina, and Tworek, Heidi 'Introduction to the Makers of Global Business'. In Teresa da Silva Lopes, Christina Lubinski, and Heidi Tworek (eds.), *Routledge Companion to The Makers of Global Business*. London: Routledge, pp. 68-105, 2019.
 23. Lopes, Teresa da Silva, 'A transformação dos mercados de vinho do Porto', in François Guichard, Philippe Roudié, and Gaspar Martins Pereira (eds.), *O Vinho do Porto e o Douro no século XX e início do século XXI*. Porto: GEHVID/Afrontamento, pp. 68-105, 2019.
 24. Lopes, Teresa da Silva, 'A Modificação das estruturas comerciais no século XX', in François Guichard, Philippe Roudié, and Gaspar Martins Pereira (eds.), *O Vinho do Porto e o Douro no século XX e início do século XXI*. Porto: GEHVID/Afrontamento, pp. 106-140, 2019.
 25. Jones, Geoffrey, and Lopes, Teresa da Silva, 'International Business History and the Strategy of Multinational Enterprises: How History Matters'. In Mellahi, K., Meyer, K., Narula, R., Surdu, I., and Verbeke, A. (eds.) *The Oxford Handbook of International Business Strategy*. Oxford: Oxford University Press, pp. 37-55, 2020.
 26. Lopes, Teresa da Silva 'Extraordinary Risk Management in International Business Strategy: Why History Matters'. In R. van Tulder, A. Verbeke, L. Piscitello, and J. Puck (eds.). *International Business in Times of Crisis Tribute Volume to Geoffrey Jones*. Bingley: Emerald, pp. 97-110, 2022.
 27. Lopes, Teresa da Silva 'Brands and the Dynamics of Industries'. In Gaspar Martins Pereira (ed.). *Brands and Designations of Origin: History and Identity*. Porto: CITCEM, 2022.
 28. Lopes, Teresa Silva, Guimarães, Carlos G.; Saes, Alexandre; and Saraiva, Luis F. 'The 'disguised' foreign investor: Brands, trademarks, and the British expatriate entrepreneur in Brazil'. In Patrizio Saiz and Rafael Castro (eds). *The Brand and its History*. London: Routledge 2022.
 29. Casson, Mark and Lopes, Teresa da Silva 'The role of time in international business: an historical perspective'. In Mark Casson (ed.) *Global Business - Past, Present and Future*.Cheltenham: Edward Elgar, 2023: 241-274.
 30. Lopes, Teresa da Silva, Casson, Mark, and Jones, Geoffrey 'Organizational innovation in the multinational enterprise: internalization theory and business history'. In Mark Casson (ed.) *Global Business - Past, Present and Future*. Cheltenham: Edward Elgar, 2023: 298-329.
 31. Lopes, Teresa da Silva 'Business History in International Business', in Donald Bergh (Ed.). Oxford Research Encyclopaedia in Business and Management. Oxford: Oxford University Press, 2023.

<https://doi.org/10.1093/acrefore/9780190224851.013.394>).

32. Fredona, Robert, and Lopes, Teresa da Silva 'Commercial Marks and Signs in European Jurisprudence, 1300-1600' with Robert Fredona. In Lionel Bently and Robert Bone (eds.), *History of Trade Mark Law*. London: Edward Elgar, 2024.
33. Duguid, Paul, and Lopes, Teresa da Silva, 'From whitewashing to greenwashing: PR confronts climate change'. In Teresa da Silva Lopes, Paul Duguid and Robert Fredona (eds.). *Climate Change and Business: A Historical Perspective*. London: Routledge, 2025 (forthcoming).
34. Lopes, Teresa da Silva, and Andrea Lluch 'The melting of glaciers and the evolving vulnerability of the wine and spirits industry'. In Teresa da Silva Lopes, Paul Duguid and Robert Fredona (eds.). *Climate Change and Business: A Historical Perspective*. London: Routledge, 2025 (forthcoming).
35. Lopes, Teresa da Silva, 'Tracing the early history of International Business Teaching.' In Nachum, Lilac, and Attila Yaprak (eds.) *The Historical Evolution of International Business: Growth Trajectories of International Business Thought, Teaching and Institutions*. London: Palgrave, 2025 (forthcoming).

iii. Articles in Journals

Refereed Contributions

36. Lopes, Teresa da Silva, 'Estudo de caso - Poças Junior', *Douro - Estudos e Documentos*, No.4 (1997): 337-356.
37. Lopes, Teresa da Silva, 'The impact of multinational investment on alcohol consumption since the 1960s', *Business and Economic History*, Vol.28, No.2 (1999): 109-122.
38. Duguid, Paul, and Lopes, Teresa da Silva 'Ambiguous company: institutions and organizations in the port wine trade, 1814-1834', *Scandinavian Journal of Economic History*, Vol.47, No.1 (1999): 84-102.
39. Lopes, Teresa da Silva, and Aguiar, Álvaro 'A marca e a internacionalização do vinho do Porto', *Douro – Estudos e Documentos*, No.9 (2000): 119-142.
40. Lopes, Teresa da Silva, 'A evolução das estruturas internacionais de comercialização de vinho do Porto no século XX', *Revista de História Económica e Social*, Série 2, No.1 (2001): 91-132.
41. Lopes, Teresa da Silva, 'Brands and the evolution of multinationals in alcoholic beverages', *Business History*, Vol.44, No.3 (2002): 1-30.
42. Lopes, Teresa da Silva, 'The growth and survival of multinationals in the global alcoholic beverages industry', *Enterprise and Society*, Vol.4, No.4 (2003): 592-98.
43. Lopes, Teresa da Silva, 'A piacoktól és hierarchiáktól a szövetségek felé: Értékesítés a globális szeszszesital-ágazatban, 1960-2004.', *Aetas*, Vol.1, No.2. (2005): 29-43.
44. Lopes, Teresa da Silva, 'Competing with multinationals: strategies of the Portuguese alcohol industry', *Business History Review* 79 (Autumn 2005): 559-585.
45. Lopes, Teresa da Silva, and Casson, Mark 'Entrepreneurship, brands and the development of global business', *Organizações em Contexto*, Year III, nº6, (December 2007): 180-213.
46. Lopes, Teresa da Silva, and Casson, Mark 'Entrepreneurship, brands and the development of business', *Business History Review* 81 (Winter 2007): 651-680. **Henrietta Larson Article Award Winner**
47. Lopes, Teresa da Silva, 'Markets, knowledge and trade in brands', *Global Business and Economics Review*, Vol.10, No.4 (2008): 449-466.
48. Lopes, Teresa da Silva, 'The entrepreneur, ownership advantages and the eclectic paradigm', *Multinational Business Review*, Vol.18 No.1 (2010): 71-87.
49. Duguid, Paul, and Lopes, Teresa da Silva, Behind the brand, *Business History Review*, Vol.86, No.2 (2012): 235-238.
50. Lopes, Teresa da Silva, with Mark Casson, 'Brand protection in the internationalisation of British consumer goods', *Business History Review*, Vol.86, No.2 (2012): 287-310.

51. Casson, Mark, and Lopes, Teresa da Silva 'Foreign direct investment in high-risk environments: An historical perspective', *Business History*, Vol.55, No.3 (2013): 375-404.
52. Lopes, Teresa da Silva, and Guimarães, Paulo 'Trademarks and British dominance in consumer goods, 1876-1914', *Economic History Review*, Vol.67, No.3 (2014): 793-817.
53. Lopes, Teresa da Silva, 'A systems view of corporate diversification', *International Studies of Management and Organization*, Vol.45, No.4 (2015): 1-17. ISSN: 0007-6805.
54. Lopes, Teresa da Silva, 'Building brand reputation through third party endorsement: Fair trade in British chocolate', *Business History Review*, Vol.40, No.3 (2016): 457-482.
55. Lopes, Teresa da Silva, and Simões, Vitor Corado 'Knowledge Spillovers and Foreign Investment in Portugal: From the Methuen Treaty to the Twenty First Century', *Business History* Vol. 62 (7) (2017): 1079-1106. doi.org/10.1080/00076791.2017.1386177
56. Lopes, Teresa da Silva, and Guimarães, Carlos G., Saes, Alexandre, and Saraiva, Luis F. 'The 'disguised' foreign investor: Brands, trademarks and the British expatriate entrepreneur in Brazil', *Business History* Vol.60, No.8 (2018): 1171-1195.
57. Lopes, Teresa da Silva, Casson, Mark, and Jones, Geoffrey 'Organizational innovation in the multinational enterprise: Internalization theory and business history', *Journal of International Business Studies*, Vol. 50 (2019): 1338-1358. doi.org/10.1057/s41267-018-0156-6
58. Lopes, Teresa da Silva, 'Transaction Costs in the International Trade of Port Wine', *Entreprises & Histoire* Vol.94, Abril (2019): 164-185.
59. Lopes, Teresa da Silva, 'The Nature of the Firm" – and the Eternal Life of the Brand', *Enterprise & Society* Vol.20, No.4 (2019): 752-776.
60. Lopes, Teresa da Silva, Lluch, Andrea, and Pereira, Gaspar Martins 'The Changing and Flexible Nature of Imitation and Adulteration: The Case of the Global Wine Industry, 1850-1914', *Business History Review* Vol.94, No.2 (2020): 347-371.
61. Lopes, Teresa da Silva, and Tomita, Shin 'Trademarks as "Global Merchants of Skill": The Dynamics of the Japanese Match Industry, 1860s-1930s', *Business History Review* (2022), Vol.96, No.3: 559-588.
62. Lopes, Teresa da Silva, Dourado, Bruna, and Souza, Elizabeth 'Unbundling the Brand: Differentiation and the Law in the Brazilian South American Tea Industry', *Business History* (2024), 66 (4): 859-83 <https://doi.org/10.1080/00076791.2022.2036130>
63. Camara, Benedita, Lopes, Teresa da Silva, and Fredona, Robert 'A Mercantilist Brand: The British East India Company and Madeira Wine, 1756-1834', *Business History Review* (2023): 1-38. [doi:10.1017/S0007680523000387](https://doi.org/10.1017/S0007680523000387)
64. Fredona, Robert, Reinert, Sophus A., and Lopes, Teresa da Silva (2023), 'Forms of Capitalism', *Business History Review* (summer 2024)
65. Jones, Geoffrey, Lopes, Teresa da Silva, Pananond, Pavid, Tulder, Rob. van, Sinkovics, Noemi, & Sinkovics, Rudolf R. (2024). 'Transitioning from Responsible and Reactive to Deeply Responsible and Proactive International business,' *Critical Perspectives on International Business* (forthcoming, 2024).
66. Amdam, Rolv Petter, Lopes, Teresa da Silva, Herydotter, Tudi, and Mata, Maria E., 'The Impact of Deglobalisation and Trade Wars on Industry Dynamics: Norwegian Salted and Dried Cod Fish and Portuguese Port Wine, 1920s-1930s', *Journal of Management Studies* (Accepted with minor revisions in October 2024)

iv. Papers Published in Refereed Conference Proceedings

67. Lopes, Teresa da Silva, and Aguiar, Álvaro 'A importância da especificidade dos activos na internacionalização das empresas portuguesas: o caso do vinho do Porto'. In *Actas do II Encontro de Economistas de Língua Portuguesa*, Conference Proceedings (Macau, June 1998).
68. Lopes, Teresa da Silva, and Aguiar, Álvaro 'A especificidade da marca na internacionalização do vinho do Porto'. In *7º Encontro Nacional de Economia Industrial*, Conference Proceedings (Vila Real, October 1998).
69. Lopes, Teresa da Silva, 'A evolução das estruturas internacionais de comercialização de vinho do Porto no século XX'. In Fátima Brandão, Álvaro Aguiar, Octávio Figueiredo, Rui Pedro Esteves, Carlos Damas, (eds.), *Linhas de Rumo da História Económica em Portugal, XX: Encontro da Associação Portuguesa de História Económica e Social*, Vol.1 (Porto: 2000).
70. Lopes, Teresa da Silva, 'Brands and the evolution of multinationals in alcoholic beverages'. In *Proceedings from European Business in the Global Network - Annual Conference of the European International Business Academy*, CD ROM (Maastricht, December 2000).
71. Lopes, Teresa da Silva, 'Mercados de vinho do Porto no século XX'. In *Simpósio - A Vinha e o Vinho na Cultura da Europa*, Conference Proceedings (Porto, September, 2001).
72. Lopes, Teresa da Silva, 'Growth and survival in the alcoholic beverages industry'. In *European Business History Association Conference 2001*, CD ROM (Oslo, August 2001).
73. Lopes, Teresa da Silva, 'Corporate governance in the global alcoholic beverages industry'. In *Proceedings of the European Business History Annual Meeting*, CD ROM (Helsinki, August 2002).
74. Lopes, Teresa da Silva, 'Diversification strategies in the global alcoholic drinks industry', Competitive paper presented. In the *Proceedings of the European International Business Academy*, CD ROM (Athens, December 2002).
75. Lopes, Teresa da Silva, 'Institutions, leadership and long-term survival: the case of Portugal and alcoholic beverages'. In *Proceedings of the European Business History Annual Meeting - Universitat Pompeu Fabra*, CD ROM (Barcelona, September 2004).
76. Lopes, Teresa da Silva, 'Instituições, sobrevivência e crescimento empresarial no Vinho do Porto, 1960- 2006'. In 'Douro Contemporâneo' GEHVID, Faculdade de Letras das Universidade do Porto, Conference Proceedings (Porto, May 2006).
77. Duguid, Paul and Lopes, Teresa da Silva, 'Entrepreneurship, trademarks and the development of global businesses' In *Proceedings International Economic History Congress*, session 40 (Helsinki, 21-25 August 2006).
78. Lopes, Teresa da Silva, 'The eternal lives of brands', CHARM – Conference on Historical Analysis & Research in Marketing, Conference Proceedings (2007).
79. Lopes, Teresa da Silva, 'Economic integration and the development of Portuguese multinationals', World Economic History Congress, Session Q4 (Utrecht, 3-7 August 2009).

v. Editorial Duties

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| 2003 - 06 | Editor of <i>Business History News</i> , the newsletter of the Association of Business Historians |
| 2003 - 07 | Reviews Editor of the journal <i>Business History</i> . |
| 2004 – 07 | Member of the Editorial Committee for the Cass Prize for the best article published in the journal <i>Business History</i> . |
| 2005 - 08 | Editor of the Working Paper Series of the Centre for Globalisation Research, Queen Mary, University of London |
| 2007 - 10 | Member of the Editorial Committee of the Newcomen Prize for the best article published annually by the journal <i>Enterprise and Society</i> (Chair of the Committee in 2008). |
| 2007 - 10 | Member of the Editorial Board of the Journal <i>Business History</i> |

- 2012 Co-Editor of the special section of *Business History Review* (with Duguid, P.) Vol.86, No.2 (2012)
- 2015 - date Member of the Editorial Board of the Journal *Business History*
- 2015 - date Member of the Editorial Board of the Journal *Enterprise and Society*
- 2015 - date Member of the Editorial Board of the *Journal of Historical Research in Marketing*

vi. All Other Works

Working Papers

80. Lopes, Teresa da Silva, 'MNEs and the internationalisation of the alcoholic beverages industry', *Discussion Papers in International Investment & Management, The University of Reading Department of Economics*, No.277 (1999).
81. Lopes, Teresa da Silva, 'Growth and survival in the alcoholic beverages industry', *Discussion Papers in International Investment & Management, The University of Reading Department of Economics*, Vol. XIII, No.292 (2001-2002).
82. Lopes, Teresa da Silva, 'Evolution of corporate governance in global industries: The case of multinationals in alcoholic beverages', *Discussion Papers in Economic and Social History, All Souls, University of Oxford*, No. 53 (February, 2004).
83. Lopes, Teresa da Silva, and Casson, Mark 'Entrepreneurship, brands and the development of global business', *Centre for Globalisation Research Working Papers, Queen Mary, University of London*, No.2 (September 2007).
84. Lopes, Teresa da Silva, 'Global management and the strategic role of brands', *Centre for Globalisation Research Working Papers, Queen Mary, University of London*, No.10 (April 2008).
85. Lopes, Teresa da Silva, 'Shifting patterns in marks and registration: France, the United States and the United Kingdom, 1870-1970', *Centre for Globalisation Research Working Papers, Queen Mary, University of London*, No.21 (August 2008).
86. Lopes, Teresa da Silva, 'Using history to help refine international business theory: ownership advantages and the eclectic paradigm', *The York Management School Working Papers*, No.54 (March 2010).

Review Articles

87. Lopes, Teresa da Silva, *Guinness 1886-1939: From incorporation to the Second World War*, by S.R. Dennison and O. MacDonagh (Cork: Cork University Press, 1998), *Business History Review*, Vol.73, No.4, (1999): 771-773.
88. Lopes, Teresa da Silva, *Brand new*, by Jane Pavitt (London: V&A Publications, 2000), in *Business History* Vol.43, No.3 (2001): 175.
89. Lopes, Teresa da Silva, *British wine merchants in Porto prior to the Methuen Treaty*, by Pedro de Brito (Associação Luso-Britânica, 2000), in *Business History* Vol.43, No.4 (2001): 127-28.
90. Lopes, Teresa da Silva, *Brand New: How entrepreneurs earned consumers' trust from Wedgwood to Dell*, by Nancy Koehn (Boston, Mass: Harvard Business School Press, 2001), in *Business History*, Vol.44, No.2 (2002): 157-8.
91. Lopes, Teresa da Silva, *Alliance capitalism and corporate management*, by John H. Dunning and Gavin Boyd, eds. (Cheltenham: Edward Elgar, 2003), in *Business History*, Vol.46, No.1 (2004): 139-140.
92. Lopes, Teresa da Silva, *A indústria Portuguesa e os seus dirigentes*, by Manuel Lisboa (Lisboa: Educa, 2002), in *Business History Review*, Vol.78, No.2 (2004): 170-72.
93. Lopes, Teresa da Silva, *The US brewing Industry – Data and economic analysis*, by Victor J. Tremblay and Carol Horton Tremblay (Boston Mass: MIT Press, 2005), in *Business History* Vol.48, No.3 (July, 2006): 439-440.

94. Lopes, Teresa da Silva, *Strategic and organization change – From production to retailing in UK brewing 1950-1990*, by Alistair Mutch (London: Routledge, 2006) in *Business History* (2007) Vol.49, No.2.
95. Lopes, Teresa da Silva, with John S. Wilson, Steve Toms, John Press, and Andrew Popp, 'Tribute to Charles Harvey', *Business History* (2008), Vol.50 No.1: 1-3.
96. Lopes, Teresa da Silva, *Food chains: from farmyard to shopping cart*, by Warren Belasca and Roger Horowitz (eds.) (Philadelphia: University of Pennsylvania Press, 2008), in *Business History Review* (2009) Vol.83 (1): 375-378.
97. Lopes, Teresa da Silva, *Creating Wine: The emergence of a world industry, 1840-1914*, by James Simpson (Princeton: Princeton University Press, 2011), in *Business History Review*, (2013) Summer, Vol.87 (2): 386-389.
98. Lopes, Teresa da Silva, *A Business History of the Swatch Group: The Rebirth of Swiss Watchmaking and the Globalization of the Luxury Industry*, by Pierre-Yves Donzé (Basingstoke: Palgrave, 2014), in *Business History Review*, Vol.89, No.2 (Summer 2015).
99. Lopes, Teresa da Silva, *History of Fair Trade in Contemporary Britain: From Civil Society Campaigns to Corporate Compliance*, by Matthew Anderson (London: Palgrave, 2015), in *Business History Review* Vol.90, No.3 (Autumn, 2016).
100. Lopes, Teresa da Silva, *International Business in Australia before World War One: Shaping a Multinational Economy* by Simon Ville and David Merrett (London: Palgrave, 2022), in *Business History* (forthcoming, 2025).

Other Printed Works

101. Lopes, Teresa da Silva, 'Country Report: 'Business history in Portugal', *EBHA Newsletter*, 9 (1999), pp. 5-6.
102. Lopes, Teresa da Silva, 'Global drink - The evolution of multinational strategies in the alcoholic beverages industry', *Enterprise and Society*, Vol.1, No.4 (2000), p. 838.
103. Lopes, Teresa da Silva, 'Conference Report for the European Business History Annual Meeting on Business and Knowledge', *EBHA Newsletter*, 14 (2002), p. 19-21.
104. Lopes, Teresa da Silva, 'The growth and survival of multinationals in the global alcoholic beverages industry' *EBHA Newsletter*, 18 (2003), p. 15-18.
105. Lopes, Teresa da Silva, 'Forever young: strategy and ownership in the life of global brands', *Business at Oxford*, 4 (Michaelmas 2003), p. 8-9.
106. Lopes, Teresa da Silva, 'Spirits and beer multinationals invest in wine', *Oxford Analytica* (February 2005).
107. Lopes, Teresa da Silva, and Duguid, Paul 'The penguin in chains – Brands and trademarks in an open innovation world', Big Innovation Centre – Blog, Work Foundation (5 December 2011).
108. Lopes, Teresa da Silva 'Using third party endorsements to build a brand's reputation: The case of British chocolate', London School of Economics Blog 7 June 2017
<https://blogs.lse.ac.uk/businessreview/2017/06/07/using-third-party-endorsements-to-build-a-brands-reputation-the-case-of-british-chocolate/>
109. Fredona, Robert, and Lopes, Teresa da Silva ' - Cordis (Horizon 20201, June 2021)
https://cordis.europa.eu/article/id/430311-trademarks-and-branding-in-renaissance-florence?WT.mc_id=exp
110. Lopes, Teresa da Silva 'O ISEG e a Solidariedade Social' – Lisbon School of Economics and Management, University of Lisbon Newsletter 94 (8 April 2022).

Research Funding

1993 - 97	£46,000 Universidade Católica Portuguesa for an MBA and an MPhil at the same University.
1997	\$1,000 Fullbright - Fundação Luso-Americana para o Desenvolvimento.
1998	\$3,000 University of California at Berkeley.
1998 - 02	£50,000 Fundação para a Ciência e Tecnologia, grant given by the Portuguese Government for a PhD at the University of Reading.
1999	\$280 Newcomen Society Travel Grant, Business History Conference
2001	\$1,000 University of California at Berkeley
2001	\$350 Alfred D. Chandler Jr. Fund Travel Grant, Business History Conference
2002	\$350 Alfred D. Chandler Jr. Fund Travel Grant, Business History Conference
2003	\$350 Grant-in-Aid, Hagley Museum and Library.
2002 – 03	£16,000 Fundação para a Ciência e Tecnologia for a Post-Doctoral Fellowship at the Saïd Business School, University of Oxford.
2006 - 11	£434,640.42 ESRC – Principal investigator of a project funded by the Economic and Social Research Council on ‘Reassessing the Mark: The Evolution of the Trademark in Theory and Practice’ (ESRC Grant RES-062-23-0193).
2013	£10,000 Pump Priming, University of York – Principal Investigator of a project on ‘Heritage in Times of Austerity’. Joint with the Departments of Archaeology, Sociology, and Film Theatre and TV at the University of York.
2014 - 17	£29,974 British Academy – Principal Investigator of a project on ‘Tangible and Intangible Goods: Patents and Trademarks, and British Investment in Brazil, 1860-1914’ (BM130264).
2015	US\$7,000 – Thomas McCraw Fellowship in Business History, Harvard Business School
2018 - 20	£183,455 - Horizon 2020 – Research and Innovation Framework Programme – Supervisor of a Marie Curie Post-Doctoral Fellowship on “Marks Medici: Branding and Trademarks in Renaissance Global Business” (H2020-749000)

Research Students

i. Supervision

1. Currently Registered as PhD Students and continuing their studies

I am first supervisor of the following students at the York Management School:

. Sudarat Sukloet – started in October 2022

2. I have been first supervisor of the following students who have been awarded a PhD

. Yong Yang – Queen Mary, University of London (2009).

. M. Shafiq – The York Management School, Univ. of York (2011).

. Nor Fuad – The York Management School, Univ. of York (2013).

. Dana Kakeesh – The York Management School, Univ. of York (2016).

. Haider Haier – started his PhD in September, Univ. of York (2016).

. Nur Suhaili Ramli – They York Management School, Univ. of York (2017).

. Doaa Sohaieb - The York Management School, Univ. of York (2017).

. Jing Han - The York Management School, Univ. of York (2018).

. Nicola Forsdike - The York Management School, Univ. of York (2019).

. Amy Nguyen Thuy Linh - The York Management School, Univ. of York (2022).

. Rui Wang - School for Business and Society, Univ. of York, Univ. of York (2023).

- . Dila Oral - School for Business and Society, Univ of York (2023).
- . Wissawas Thongteerapharb - School for Business and Society, Univ. of York (2024)
- . Fabian Hoeft – School for Business and Society, Univ. of York (2024)
- . Maria Ana Oca – School for Business and Society, Univ of York (2024)

3. Supervision of MSc Dissertations

At the University of York and also at Queen Mary, University of London I also have contributed to the supervision of over 60 students at the Masters (MAs and MSc's) as well as Undergraduate levels.

4. Post-Doctoral Supervisor and Career Mentor

I have also acted and act as Post-Doctoral supervisor and mentor of several colleagues from different parts of the world. Recently I was post-doctoral supervisor of Dr. Bob Fredona, as part of the Marie Curie project. I am also the mentor of junior colleagues in the school.

ii. Examining PhD students

I have acted as external examiner of the following candidates:

- . PhD External Examiner, Pedro Neves, Universidade Técnica de Lisboa, Portugal (18 July 2006).
- . PhD External Examiner, Eva Fernandez Garcia, Universidade Carlos III, Madrid, Spain (4 April 2008).
- . PhD External Examiner, Mior Harris, Henley Business School, University of Reading, UK (24 July 2012).
- . PhD Internal Examiner, David Turner, The University of York, UK (19 November 2013).
- . PhD External Examiner, Waraporn Yangsap, Birkbeck College, University of London, UK (4 May 2016).
- . PhD External Examiner, Zoi Pittaki, University of Glasgow, UK (2 September 2016)
- . PhD External Examiner, Farzana Nahid, University of Malaya, Malaysia (7 March 2017)
- . PhD External Examiner: Thomas Mollanger, University of Bordeaux, France (15 February 2018)
- . PhD Examiner: Bruna Dourado, Universidade Federal Fluminense, Rio de Janeiro, Brazil (27 March 2019)
- . PhD Internal Examiner: Almoatazbillah Sayed Hassan, The University of York (9 June 2021).
- . PhD External Examiner: Beatriz Elena Rodrigues-Satizabal, Queen Mary, University of London, UK (2 December 2020).
- . PhD External Examiner: Julien del Marmol, Université Libre de Bruxelles, Belgium (27 August 2021).
- . PhD Internal Examiner: Juan Ramon Candia Jorquera, University of York (3 May 2024)
- . PhD External Examiner – Main Opponent: Happy Kondwani Ngoma, Department of Economy and Society, University of Gothenburg (31 May 2024).
- . PhD External Examiner – Main Opponent: Pedro Leitão, University of Porto (16 July 2024).

iii. Thesis Advisory Panel and Progression Panel -PhD students

I act/have acted on the Thesis Advisory Panel of many PhD students at The York Management School and the History Department.

I have also acted as member of the PhD progression panel for several PhD candidates at the York Management School, and Erasmus University, Rotterdam. I also acted as referee for PhD grant applications at the York Management School.

iv. Member of Examining Panels for Associate Professor and Full Professor

Recent appointments as external examiner for promotions include:

- . “Provas de Agregação” – External Examiner of a public examination for Universidade Nova, Portugal 2020 – part of the academic career progression in Portugal.
- . University of Glasgow – External examiner for position of full professor (2020)
- . External examiner for Full professor Position, Faculty of Arts & Social Sciences, Carleton University, Canada, 2021
- . Erasmus University - Member of the Committee Evaluating Research in Department of History and Communications (2020)
- . Nova Business School - External examiner for Associate professor category, Universidade Nova de Lisboa, Portugal (30-31 January 2020).
- . University of Lisbon, Instituto Superior de Economia e Gestão - Member of the Panel appointing Associate Professors in Economic and Business History (2021).
- . Faculty of Arts & Social Sciences, Carleton University, Canada – member of the Panel evaluating promotions for Full Professor Position (2021).
- . Queen Mary University – external evaluator for promotions to Chair Position at Queen Mary University of London (2021).
- . Nova Business School, Portugal - external examiner for Full Professor Position, Universidade Nova de Lisboa, Portugal (June 2022).
- . Northumbria University – external evaluator for promotions to Associate Professor at the Department of Entrepreneurship, Innovation and Strategy, Faculty of Business and Law (2022).
- . University of Tokyo, Japan - external evaluator for promotion to chair position in Business History (2023).

Other Research Activities and Distinctions

Prizes and Distinctions

- 1989 Nominated in the *Deans List* in the United States of America, for excellent academic achievement at the *University of South Carolina* (last year of the undergraduate degree) (1989).
- 1997 ‘Dona Antónia Adelaide Ferreira’ Prize - the Portuguese Woman of the Year (This is a bi-annual national prize awarded to a Portuguese woman with a distinguished established or promising career)
- 2000 Best Paper Prize in International Strategy and Management. *European Business History Association*, Bordeaux, 15-16 Sept.
- 2003 Cass Prize for the Best Article published in the journal *Business History*
- 2003 Winner of the Coleman Prize for the best PhD Dissertation, *Association of Business Historians*, University of Cambridge 30 May 2003
- 2007 Winner of the Henrietta Larson Award for the best article published in the *Business History Review*
- 2010-17 Fellow of the ESRC (Economic and Social Research Council) Peer Review College
- 2013 President Elect of the Association of Business Historians (ABH)
- 2014-17 President of the Association of Business Historians (ABH)
- 2014 Highly Commended Excellence Award – Supervisor of the Year, University of York YUSU and Students’ Union
- 2015 Thomas McCraw Fellow, Harvard Business School
- 2017 Catedra Corona Visiting Professor, University of Los Andes, Bogota
- 2018 Japan Society for the Promotion of Science, Visiting Professor
- 2017-18 President Elect of the Business History Conference (BHC)
- 2018-19 President of the Business History Conference (BHC)

- 2019-20 President Elect of the European Business History Conference (EBHA)
- 2021 Highly Commended Excellence Award – Supervisor of the Year, University of York YUSU and Students' Union
- 2021-23 President of European Business History Conference (EBHA)
- 2022-26 Fellow of the Economic and Social Research Council (ESRC) Peer Review College, United Kingdom

Invited Keynote Speeches, Plenary Speaker, Guest Lectures:

- 1998 Invited Speaker on 'Governance structures in Portuguese wine trade, 1812-1840', at the *Anglo-Hungarian Conference on International Business History* (Reading, 4-5 September 1998).
- 1998 Invited Speaker 'The Company you Keep: The Port Trade in the Declining Years of the Wine company', at the Conference on *Fortified wines and History* (Centro de História do Atlântico, Universidade da Madeira Funchal - Madeira, 19-24 April 1998).
- 1999 Invited Speaker 'MNEs and the internationalisation of the alcoholic beverages industry', *Special Workshop on International Business* (Meiji University, Tokyo, Japan, 13 September 1999).
- 1999 Guest Lecture, 'Multinationals and the Growth of Multinationals in Alcoholic Beverages', (University of Kobe, Kobe, Japan, 9 September 1999).
- 2000 Guest Speaker on 'The development of international markets and the distribution of Port wine in the twentieth century', at the *CIBH/Hungarian Business History Workshop* (Budapest University of Economics, Budapest, 7-8 April 2000).
- 2000 Guest Lecture on 'A evolução das estruturas internacionais de comercialização de vinho do Porto no século XX', at the *Encontro da Associação Portuguesa de História Económica e Social* (Porto, 23-24 November 2000).
- 2001 Keynote Speaker on 'The Internationalisation of Industries: A Case Study on Alcoholic Beverages', Second Aarhus Workshop on International Business History (Aarhus, Denmark, 25-26 May 2001).
- 2001 Guest Lecture on 'Mercados de vinho do Porto no século XX', at the *Simposium - A Vinha e o Vinho na Cultura da Europa* (GEHVID, Faculdade de Letras da Universidade do Porto Porto, 10-12 September, 2001).
- 2002 Plenary Speaker on 'International Business at Reading', *European International Business Academy* (Athens, Greece, 8-10 December 2002).
- 2003 Guest Lecture on 'Forever young: strategy and ownership in the life of global brands', Workshop on *Globalisation and Services: New Research and Teaching on Corporate Control and the Emergence of the Modern Service Sector* (The University of Reading, Reading, 17 June 2003).
- 2004 Guest Speaker on 'Networks, markets and hierarchies', *Anglo-Hungarian Workshop in Business and Economic History* (Budapest University of Economics, Budapest, 6-8 May 2004).
- 2005 Invited Speaker on 'Why is the alcoholic beverages industry a good example of globalisation of industries', for the workshop on *The Global Evolution of Business Enterprise over the Twentieth Century*, (University of Reading, Reading, 2 December 2005).
- 2006 Keynote Speaker on 'The Globalization of the Brewing Industry' at the, *European Business History Association Annual Conference*, Copenhagen (Copenhagen, 17-18 August 2006).
- 2006 Keynote Speaker on 'Instituições, sobrevivência e crescimento empresarial no vinho do Porto, 1960-2006', Colóquium '*Douro Contemporâneo*' (GEHVID, Faculdade de Letras da Universidade do Porto, Porto, 5-6 May 2006).
- 2006 Keynote Speaker 'Born Global: Two Hundred and Fifty Years in the Life of Port', (Portuguese Department of Trade and Industry, Royal Academy of Arts, London, 11 October 2006).

- 2006 Plenary Speaker on 'Intellectual Property Rights and Corporate Dominance in an Era of Globalization', at the *DIME Conference on Intellectual Property Rights for Business and Society* (London, 14 - 15 September 2006).
- 2009 Plenary Speaker on 'What are Ownership Advantages?', at the *Second Reading International Business Conference* (Reading, 30-31 March 2009).
- 2010 Guest Lecture on 'New Directions in International Business: Multinationals and Business History' Copenhagen Business School (Copenhagen, 1 October 2010).
- 2011 Plenary Speaker on 'Innovation and the Built Environment: A Business History Perspective' at the International Conference on Innovation and the Built Environment, (London, 7-9 October, 2011).
- 2013 Invited Speaker 'Why do a Postgraduate Degree in Management in the United Kingdom?', British Council (São Paulo, Brazil, 18 October 2013).
- 2013 Keynote Speaker on 'Trademarks and the Evolution of Capitalism', *Brazilian Economic and Business History Annual Conference* (Ouro Preto, Brazil, 8-11 September 2013)
- 2013 Plenary Speaker on 'The Job Market for Business Historians' Business History Conference (Columbus, USA, 21-23 March 2013).
- 2014 Invited Speaker at the Colloquium on 'Comparative Perspectives in Business History', Bocconi University, Milan (23-24 October 2014).
- 2015 Keynote Speaker at the Bank of Portugal Conference in honour of José da Silva Lopes, (Bank of Portugal, Lisbon, Portugal, 14 December 2015).
- 2015 Invited Speaker at the Harvard Workshop on 'Industries and Global Competition', Harvard University (Cambridge MA, USA, 5 November 2015).
- 2015 Invited Speaker at the Colloquium on 'Intellectual Property and Production' University of Cambridge, Faculty of Law (Cambridge, UK, 24 January 2015).
- 2017 Keynote Speaker at the 37th Annual Conference of the Associação Portuguesa de História Económica e Social (University of Madeira, Funchal, Portugal, 17-18 November 2017).
- 2017 Invited Speaker Catedra Corona Lecture (University of Los Andes, Bogota, Colombia, 19 September 2017).
- 2017 Keynote Speaker 'Competing in Global Chains: From Commodities to Brands', International Conference on The Fate of Nations' Norwegian University of Science and Technology - NTNU, (University of Trondheim, Trondheim, Norway, 3-4 March 2017)
- 2018 Keynote speaker at the 54th International Congress of the Business History Society of Japan (Kyoto University, Japan, 29-30 September 2018).
- 2018 Keynote Speaker at the Book Launch in Honour of José da Silva Lopes (Instituto Superior de Economia e Gestão, University of Lisbon, Portugal, 20 March 2018).

- 2019 Presidential Address ‘The Nature of the Firm – and the Eternal Life of the Brand’, Business History Conference (Cartagenade Indias, Colombia, 16 March 2019).
- 2019 Keynote Speaker ‘Interdisciplinarity and the Real Lessons from Business History’, at the 2nd Business History Workshop of China (Guilin, China, 2-3 November 2019).
- 2021 Guest Public Lecture on ‘Brands in International Business: An Historical Perspective’, Université Libre de Bruxelles, Solvay Business School, Belgium (Brussels, 7 May 2021).
- 2021 Keynote Address ‘The Impact of Brands of Firms, Industries and Nations’ at the CITCEM International Congress on “Brands and Designations of Origin: History and Identity” (Porto, 19-20 May 2021).
- 2021 Opening Keynote Speaker for The III Workshop on Varieties of Socialism: Doing Business under the Communist Regime (Charles University/EBHA, 17-18 December 2021).
- 2022 Opening Speaker for the IV Workshop on Business History in Central and Eastern Europe on ‘Firms, Wars and Ethics in the Business History of Central-Eastern Europe and Russia’ Venice School of Management, Ca’ Foscari University (Venice, 21-22 October 2022)
- 2023 Keynote speaker “Strategies and Structures for Crises, Transitions and Resilience” at the Congrès International d’Histoire des Entreprises en France (Paris, 14-16 June 2023).
- 2023 President Speech, European Business History Association, Oslo City Hall 24 August 2023.
- 2023 Keynote Address “Business Cooperation in a Turbulent World” at the Workshop on Business Cooperation in the History in Central and Eastern Europe (Budapest, 26-27 October 2023).
- 2024 Invited Speaker “The ‘Turbulent’ Life of Business History: Exploring New Paradigms and Perspectives”, Celebrating the 50th Anniversary of the GHE, University of Los Andes (Zoom, 9 May 2024).
- 2024 Invited Speaker at Intesa San Paolo Digital Talks on Leadership_“The Challenge of Global Mindset: Fostering Entrepreneurship and Innovation in a Global Business”, Intesa San Paolo, Italy (Zoom, 10 October 2024).

Invited Speaker at Seminars

I was Guest Speaker in Academic Seminars and at multiple UK and foreign universities, including:

- BI – Business School, Oslo, Norway (2019)
- Birkbeck College, University of London, UK (2009)
- Bocconi University, Milan, Italy (2011)
- Colegio Universitario de Estudios Financieros – CUNEF, Madrid, Spain (2018)
- Copenhagen Business School, Copenhagen, Denmark (2010)
- Eötvös Loránd Tudományegyetem (ELTE) University, Budapest, Hungary (2023)
- Hosei University, Tokyo, Japan (2018)
- Instituto Superior de Economia e Gestão, Lisbon, Portugal (2016)
- Japanese Academy of International Business, Tokyo, Japan (2018)
- Kings College, University of London, London, UK (2008)
- Kobe University, Kobe, Japan (1999)
- Kyoto University, Kyoto, Japan (2019)
- Lancaster University, Lancaster, UK (2007)
- London School of Economics, London, UK (2001, 2017, 2021).

Meiji University, Tokyo, Japan (1999, 2018)
 Manchester Business School, Manchester, UK (2016)
 Nihon University, Tokyo, Japan (2018)
 Nuffield College, Oxford, UK (2002)
 Oxford Brookes University, Oxford, UK (2003)
 Queen Mary, University of London, London, UK (2004)
 Saïd Business School, University of Oxford, Oxford, UK (2010)
 Temple University Business School, Philadelphia, USA (2011)
 Tokyo University, Tokyo, Japan (2018)
 Université Libre de Bruxelles, Solvay Business School (2021)
 University of Alicante, Spain (March 2025, forthcoming)
 University of California at Berkeley, USA (2001)
 Universidade Católica Portuguesa, Lisbon, Portugal (2003)
 Universidade Federal do Parana, Curitiba, Brazil (2012)
 Universidade Federal Fluminense, Rio de Janeiro, Brazil (2016, 2019)
 Università Ca' Foscari, Venice, Italy (2024)
 University of Glasgow, Glasgow, UK (2013, 2018)
 University of Liverpool, Liverpool, UK (2011)
 University of Manchester, Manchester, UK (2016)
 University of Parma, Italy (February 2025, forthcoming)
 Centre for Institutional Performance and Centre for International Business History, University of Reading
 Reading, UK (1998, 2012, 2021)
 Erasmus University, Rotterdam, The Netherlands (2012, 2016)
 Universidade Técnica de Lisboa - ISCTE, Lisbon, Portugal (2012)
 University of York, Department of Economics, UK (2004)
 University of York, The York Management School, UK (2016)
 University of Utrecht, Utrecht, The Netherlands (2011)

Organization of Conferences and Workshops, Member of Conference Programme Committees, Track Chair

2004	Organiser of the workshop in "International Business History - The Future of the Past", at Queen Mary (London, 7 June 2004)
2004-05	Organiser of all the departmental seminars for the period 2004-2005 and coordinator of all the academic events organized by the department during that period.
2006	Conference Organizer on 'Globalisation and Business History', Annual Conference of the Association of Business Historians, hosted by the Centre for Globalisation Research at Queen Mary. This conference with 150 participants was the largest conference ever organized by this association and attracted people from all continents of the world (citation from ABH Newsletter, Autumn 2006) (London, 16-17 June 2006).
2007	Organiser of the workshop 'Globalisation and Trademarks', hosted by the Centre for Globalisation Research, Queen Mary, University of London. (London, 11 May 2007).
2008	Organiser of the Workshop 'Global Trends and International Comparisons', Centre for Globalisation Research, Queen Mary, University of London. (London, 9 May 2008).
2009	Co-organiser of the Conference on 'A New Kind of Property – an Old Perspective on Trade Marks'. Hosted by CEGBI (York, 20 November 2009).

- 2009 Co-organiser of the International workshop 'Branding at the Periphery' – An International and Comparative Perspective', hosted by CEGBI (York, 19 November 2009).
- 2009 Co-organiser workshop on 'Business History in Global Business Schools'. Jointly organized by the Centre for the Evolution of Global Business and Institutions (University of York) and Centre for Globalisation Research (at Queen Mary, University of London) It brought together key academics in business history and deans from leading business schools in Britain, the US and Continental Europe. (London, Charterhouse Square, 15 May 2009).
- 2009 - date Organiser of the CEGBI Guest Lecture and Public Lecture Series
- 2009 - date Organiser of the CEGBI Seminar Series (hosting speakers from multiple academic and non academic institutions around the world)
- 2010 Co-organizer of the International conference on 'Marketing and Branding Mobility'. Jointly organized by the Centre for Evolution of Global Business and Institutions, The History Department (both at the Univ of York) and the National Railway Museum.(York, 17-19 Nov 2010).
- 2010 Co-organiser of the International Conference on 'Globalisation and the Changing Role of Professional Services' Jointly organized by the Centre for Evolution of Global Business and Institutions and the Advanced Institute of Management (AIM). (York, 25 February 2010).
- 2011 Co-organizer of the International workshop on 'Fairtrade, Governance and History'. Jointly organized between the Centre for Globalisation Research at Queen Mary, University of London and the Centre for Evolution of Global Business and Institutions, Univ. of York. (London, July 2011).
- 2011 Member of the Programme Committee, Business History Conference (St Lewis).
- 2013 Co-organizer of the CEGBI/CSWL Summer Conference, jointly organized between CEGBI and the Centre for the Study of Working Lives. The York Management School (York, 13-14 June 2013).
- 2013 Co-organizer of the International workshop 'Whose Business is Heritage?'. Jointly organised with Dr. John Schofield, Department of Archaeology. And CEGBI at The York Management School (York, 26 April 2013).
- 2014 Co-organizer of the CEGBI/CSWL/CEO Summer Conference, jointly organized between CEGBI and two other research centres at The York Management School (York, 30 June-1 July 2014).
- 2015 Co-organizer of the CEGBI/CSWL Summer Conference, jointly organized between CEGBI and two other research centres at The York Management School (York, 18-19 June 2015).
- 2016 Member of the Best Paper Prize Committee, Annual Conference of the European Business History Association.
- 2016 Organizer of the Workshop on 'Heritage Branding', CEGBI, The York Management School (16 September 2016).
- 2016 Co-organizer of the international workshop on 'Reflections on the Impact of Foreign Direct Investment on Brazilian Economic Development' (Rio de Janeiro, 22 July 2016).
- 2016 Co-organizer of the joint Annual Conference of the Association of Business Historians, with the German Association of Business Historians on Creativity and Entrepreneurship in the Global Economy, Berlin, 27-28 May 2016.
- 2017 Member of the programme committee for the annual conference, European Business History Association, Vienna August 2017.
- 2017 Member of the programme committee for the annual conference, Association of Business Historians Annual Conference, University of Glasgow, June 2017.
- 2017 Workshop co-organizer on 'The Makers of Global Business – Part 2', Association of Business Historians Annual Conference, June 2017.

- 2017 Workshop co-organiser on 'The Makers of Global Business – Part 1', Business History Conference, Denver April 2017.
- 2017 Workshop Organizer on Interdisciplinary Approaches to the Study of Brands in Business, Centre for Evolution of Global Business and Institutions, University of York, June 2017.
- 2017 Workshop co-organizer with Emeritus Professor Mira Wilkins, and Niels Viggo Haueter, on the 'Impact of multinationals on Economic Development' Zurich 13-15 December 2017.
- 2018 Stream co-organizer with Emeritus Professor Mira Wilkins, on Impact of Multinationals on Economic Development. World Economic History Congress; Boston, 29 July - 3 August 2018.
- 2018 Member of the Programme Committee for 54th International Congress of the Business History Society of Japan, Kyoto University, Japan, 29-30 September 2018.
- 2019 Member of programme committee for the European Business History Association, Rotterdam Netherlands, 29-31 August 2019.
- 2019 Co-organizer of the CEGBI/RIE Summer Conference, organized by the Centre for Evolution of Global Business and Institutions and the Risk Innovation and the Economy theme at The York Management School, University of York, 13 September 2019
- 2019 Member of programme committee for the Business History Conference, Cartagena de Indias Colombia, 14-16 March 2019.
- 2020 Workshop co-organizer with Niels Virgo-Haueter at SwissRe on 'Risk, Uncertainty and Global Business', Zurich, 26 February 2020.
- 2021 Member of the programme committee of the World Business History Congress, Nagoya, Japan 10-12 September, 2020 (postponed to 9-11 September 2021).
- 2021 Track chair at the Annual Conference of the European International Business Academy – Business History (Complutense University of Madrid 10-12 December, 2021).
- 2021 Member of the programme committee of the Associação Portuguesa de História Económica e Social, Universidade Nova de Lisboa, (Lisbon 9-10 July 2021).
- 2021 Member of the Programme Committee of the World Congress in Business History (7-9 September 2021).
- 2021 Member of the Best Paper Prize Committee of the Annual Conference of the Associação Portuguesa de História Económica e Social, Universidade Nova de Lisboa, Lisbon 9-10 July 2021.
- 2022 Co-organizer of conference on 'Forms of Capitalism', Harvard Business School May 2022.
- 2022 Member of the Programme Committee of the Annual Conference of the European Business History Association Madrid, 22-24 June 2022.
- 2022 Track Chair of the European International Business Academy Annual Conference – Business History, Oslo, 8-10 December 2022.
- 2022-2024 Co-organizer of the Annual Summer Conference of the School for Business and Society/CEGBI Centre for Evolution of Global Business and Institutions
- 2023 Workshop co-organiser on 'Climate Change and Business History', Swiss-Re Centre for Global Dialogue, Zurich, 26-26 May.
- 2023 Member of the Programme Committee of the Annual Conference of the European Business History Association Oslo, 24-26 August 2023.
- 2023 Track Chair of the European International Business Academy Annual Conference - Changing IB Power and New Firms: Challenges for Europe, Lisbon, 15-17 December 2023.

Contributions to Conferences

I have given over 230 conference and workshop presentations in the last 20 years at international academic conferences, as well as in a range of specialized workshops. I can provide more detail about the conferences that I attended.

Invited Discussant and Stream/ Track/ Session/Panel Organiser:

- 2000 Session organizer, 'National Products and international markets – Studies of internationalisation in the alcoholic beverages industry', *European Business History Association Convention*, Bordeaux, France, 14-16 September.
- 2002 Session organizer, 'Corporate governance and the evolution of multinationals', *Business History Conference*, Wilmington Delaware, USA, 19-21 April.
- 2004 Session organizer, 'Commerce, diplomacy and the evolution of industries', *European International Business Association*, Universidad Pompeu Fabra, Barcelona, 16-18 September 2004.
- 2004 Invited discussant to a panel on 'The marketing of food and drink in France and the United States, 1800-1950', *Business History Conference*, Le Creusot, 17-19 June 2004.
- 2004 Session organizer, 'Commerce, diplomacy and the evolution of industries', *European International Business Association*, Universidad Pompeu Fabra (Barcelona, 16-18 September).
- 2006 Invited discussant to a panel on 'Liberating Beer', at *Business History Conference*, Toronto 9-10 June 2006.
- 2007 Invited Discussant to a panel on 'Entrepreneurs, culture and path dependency', at the *Anglo Italian Conference on Entrepreneurship: Historical and Comparative Perspectives*, organized jointly by the Italian Economic History Society and Bocconi University (Brescia, 9 June 2007).
- 2007 Session organiser, 'Food and drinks in brands', Association of Business Historians, University of Wolverhampton 29-30 June 2007) – a panel with three speakers and one chair.
- 2009 Invited Discussant to a panel on 'FDI and globalization, 1945-2005' at the XVth World Economic History Congress, Utrecht, 3-9 August 2009.
- 2009 Invited Discussant to a panel on 'Long range approach to intangible assets through branding', joint Conference of the European Business History Conference and the American Business History Conference, Milan, 11 - 13 March 2009.
- 2009 Session Organizer to a panel on 'Fashions in management', joint Conference of the European Business History Association and the American Business History Conference, Milan, 11 – 13 March 2009.
- 2010 Session Organizer to a panel on 'Global business and branding strategies', at the Association of Business Historians Annual Conference, York, 16 - 17 July 2010.
- 2011 Session Organizer to a panel on the 'Marketing knowledge and the growth of industries', at the Business History Conference, St. Louis, 31 March - 2 April 2011.
- 2012 Invited Discussant to a panel on 'Potential and conflicts in the expanding food industry', Joint Conference of the European Business History Association and the Business History Society of Japan, Paris, Ecole des Hautes Etudes en Sciences Sociales, 30 August-1 September 2012.
- 2018 Invited Panel member of the Doctoral Colloquium, BHC Conference, 14 March 2018, Baltimore.
- 2018 Session organizer European Business History Association, Ancona September 2018.
- 2018 Session organizer on 'Brands and Trademarks in the Evolution of Industries', Business History Conference, Baltimore April 2018.
- 2019 Session organizer on 'My Marks or York?' European Business History Conference, 29-31 August 2019.

- 2019 Session organizer on ‘Beware of brands! European Business History Association, 29-31 August 2019.
- 2019 Panel co-organizer with Geoffrey Jones on “History Matters: A Disciplinary Dialogue with International Business”, Academy of International Business, Copenhagen 24-27 June 2019.
- 2019 Panel co-organizer with Geoffrey Jones on “Globalization and De-Globalization and the Changing Boundaries of Global Value Chains”, Academy of International Business, Copenhagen 24-27 June 2019.
- 2019 Session co-organizer with Robert Fredona of 2 sessions on “My Marks of Yorks?’ and ‘Beware of Brands!’ at the European Business History Association, Rotterdam, 29-31 August 2019.
- 2019 Panel co-organiser with Prof Geoffrey Jones (Harvard Business School). Track 2: Globalization and De-globalization and the Changing Boundaries of Global Value Chains?, Academy of International Business. Copenhagen, June 2019.
- 2019 Panel co-organiser with Prof Geoffrey Jones (Harvard Business School). Track 6 “History matters: A disciplinary dialogue with international Business”, Academy of International Business, Copenhagen, June 2019.
- 2019 Panel speaker on “Teaching Business History in Business Schools, European Business History Association, Rotterdam September 2019.
- 2019 Panel organiser and speaker on “Global Value Chains in a Confused World Order” European International Business Academy, Leeds, December 2019.
- 2020 Invited discussant of keynote speech by Martin Wolf from The Financial Times on ‘The Future of Globalisation’ European Business History Association. Zoom-Online, September 2020.
- 2021 Invited discussant of a session on ‘Branding and Building the United States, c.1830-1910’ Business History Conference, Zoom- Online, 11-13 March 2021.
- 2021 Invited Chair and discussant of the keynote speech by professor Deidre McCloskey, University of Chicago on Business and Economic History: Compliments or Substitutes, World Congress in Business History. Zoom-Online, 9-11 September 2021.
- 2021 Invited discussant and Chair of Panel on “Can Business History Journals survive in Non-English Speaking Countries?” World Congress in Business History, Zoom-Online, 9-11 September 2021.
- 2021 Invited Discussant of Panel on ‘Branding and Emotions’ World Congress in Business History. Zoom-Online, 9-11 September 2021.
- 2021 Invited Panelist ‘Communicating History to Society’, World Congress in Business History. Zoom-Online, 9-11 September 2021.
- 2021 Invited discussant of a session on ‘Branding and Building the United States, c.1830-1910’ Business History Conference, Online, 11-13 March 2021.
- 2022 Panel organizer ‘Crises and Multinationals in International Business’ Track 4 Global Strategy, Organization and Value Chains, Academy of International Business. Miami 3-6 July 2022.
- 2022 Panel organizer ‘O Pioneers’, Business History Conference. Mexico City, 7-9 April 2022.
- 2022 Panel organiser and speaker ‘Institutions and the Branding of Business History’, Business History Conference, Mexico City, 7-9 April 2022.
- 2022 Session organiser and speaker ‘Brands as Rules, Brands or Rules’ Business History Conference, Mexico City, 7-9 April 2022.
- 2022 Session organizer and speaker ‘Merchants and the Global’, Business History Conference, Mexico City, 7-9 April 2022.
- 2022 Invited Chair and Opening Speaker to introduce the President of the Business History Conference and the Presidential Address by Andrea Lluch, Mexico City, 7-9 April 2022.
- 2022 Invited Panelist on ‘Teaching Business History Across Disciplines and Borders’ Business History Conference, Mexico City, 7-9 April 2022.

- 2022 Session organizer 'Embracing the Brand beyond Conventional Boundaries' European Business History Association Annual Conference, Madrid 22-24 June 2022.
- 2022 Panel organizer and chair 'The Institutional Environment and the Future of Business History' European Business History Association Annual Conference, Madrid 22-24 June 2022.
- 2022 Panel Co-organiser and panel speaker on 'Crises and Multinationals in International Business', Academy of International Business Annual Conference, Miami 6-9 July 2022.
- 2022 Chair and EBHA President Opening Speech to introduce the EBHA Lifetime Achievement Award and keynote speech by Professor Geoffrey Jones, European Business History Association Annual Conference, Madrid, 22-24 June 2022.
- 2022 Panel Organiser on 'MNE Resilience in International Business' European International Business Academy Annual Conference, Oslo, 7-10 December 2022.
- 2022 Panel organizer on 'International Business Theory, Business History and Sources' European Business History Association – Annual Conference, Oslo, 7-10 December 2022.
- 2023 Invited Commentator on Paper Session on 'You've Got Chemistry', Business History Conference Annual Conference, Detroit, 16-18 March 2023
- 2023 Panel organizer on 'Business History and Climate Change', European Business History Association - Annual Conference, Oslo 24-26 August 2023.
- 2023 Panel organizer on 'Deeply Responsible Business' European Business History Association - Annual Conference, Oslo 24-26 August 2023.
- 2023 Chair and EBHA President Opening Speech to introduce the EBHA Lifetime Achievement Award and keynote speech by Patrick Fridenson, European Business History Association Annual Conference, Oslo, 22-24 June 2022.
- 2023 Panel organizer on 'Risk and regulation in International Business' European Business History Association - Annual Conference, Oslo 22-24 June 2023.
- 2023 Invited Panelist on 'The Past-Present-Future of Sustainable Business: What Is the Future for IB Scholarship', Academy of International Business - Annual Conference, Warsaw 5-9 July 2023,
- 2023 Invited Panelist on the 'Summary of the History of International Business Project – Part 2' Academy of International Business - Annual Conference, Warsaw 5-9 July 2023.
- 2023 Panel Organizer on 'MNE Resilience to Exogenous Shocks: An Historical Perspective' Academy of International Business - Annual Conference, Warsaw 5-9 July 2023.
- 2023 Invited Panelist on 'Business History. Future themes and current situation', 5th Workshop on Business History in Central and Eastern Europe, Budapest, 26-27 October 2023.
- 2024 Panel organizer on 'What can history tell us about international business in a fractured world?', Academy of International Business, Annual Conference, 2-6 July, Seoul 2024.
- 2024 Panel organiser on 'Leveraging archives from Tycoons like Aristotle Onassis to grasp challenges and trends in global business,' European Business History Association Annual Conference, 11-13 July, Lisbon 2024,
- 2024 Roundtable Organiser – 'Why should Business Historians be interested in Climate change?,' European Business History Association Annual Conference, 11-13 July, Lisbon 2024.
- 2025 Roundtable Organiser 'Integrating Climate Change into Business History' Business History Conference, Annual Conference, 13-15 March, Atlanta 2025.
- 2025 Workshop organiser 'Business History and Theory', 13 March, Atlanta 2025.

Visiting research positions

- 1988 Visiting Student at University of South Carolina, United States- nominated for the US Dean's List

- 1993 - 1998 Member of Business and Economics Research Centre, Universidade Católica Portuguesa
- 1998 Visiting Scholar at University of California, Berkeley, Department of Social and Cultural Studies
- 1990 Visiting Student at Leeward Business School, The Netherlands.
- 2001 Visiting Scholar at University of California, Berkeley, Department of Social and Cultural Studies
- 2003 - 2010 Research Associate at Centre for International Business History, University of Reading Studies
- 2003 - date Research Associate at Centre for Institutional Performance, University of Reading
- 2002 - 03 Post-Doctoral Fellow at Oxford University, Saïd Business School
- 2003 Visiting Scholar at École Polytechnique - CRG, Paris
- 2003 - 2009 Visiting Research Fellow at Universidade Católica Portuguesa, Porto
- 2006 - 11 Fellow of the International Research Network - Dynamics of Institutions and Markets in Europe (DIME) – Network of Excellence of the European Union, Sixth Framework Programme
- 2010 - 2017 Fellow of the ESRC (Economic and Social Research Council) Peer Review College
- 2010 - date Fellow of the International Network of Interdisciplinary Research in Family Firms NIRFF
- 2011 Visiting Fellow at Columbia University, New York (Autumn)
- 2012 - date Fellow of the Centre for Globalization Research, Queen Mary, University of London
- 2013 - 2017 Member of the Liaison Committee of the History Society Associations
- 2013 - date Associate Fellow of the Research Centre *Proprietas*, Universidade Federal Fluminense, Rio de Janeiro
- 2015 - date Associate Fellow of the John Dunning Centre for International Business, University of Reading
- 2015 Thomas McCraw Fellow, Harvard Business School, USA
- 2017 Catedra Corona Visiting Professor, University of Los Andes, Bogota, Colombia
- 2018 Visiting Professor at Keio University, Japan
- 2018 Visiting Professor at Kyoto University, Japan
- 2024 Intesa San Paolo Visiting Chair in Global Governance, University of Rome - Tor Vergata, Italy.

Referee of Prizes, Conferences, and PhD Workshops

- 2000 - date Referee of competitive papers submitted to the European International Business Academy
- 2004 Referee of the Coleman Prize Committee for the Best PhD Dissertation, Association of Business Historians.
- 2006 - 2018 Referee of papers submitted to the Association of Business Historians
- 2006 Referee of papers submitted to the Conference on Historical Analysis and Research in Marketing
- 2007 - 2015 Referee for Projects submitted, and Research Centres funded by the Economic and Social Research Council.
- 2008 - 2018 Referee of Projects submitted to the Leverhulme Trust.
- 2010 - date Referee of papers submitted to the Business History Conference
- 2010 - 2020 Referee of applications for Membership to CEF-UP Centro de Economia e Finanças da Universidade do Porto, Portugal
- 2014 - 2020 External Peer Review Assessor for the Australian Research Council
- 2014 Referee of the European Business History Association 2014 Annual Conference Prize of the best PhD dissertation
- 2015 - 2022 External Peer Review for the Assessor the Irish Research Council
- 2015 - 2018 Referee of the Hagley Book Prize for the Best Book in Business History

- 2015 - date Referee of book proposals by several publishers such as Oxford University Press, Palgrave, and Routledge
- 2016 Referee of the prize for the best paper submitted to the joint World Congress in Business History/European Business History Conference
- 2016 - date Referee of papers submitted to the Academy of International Business (AIB)
- 2016 - 2019 Referee of papers submitted to the Academy of International Business – UK Chapter
- 2017 - date Member of the Academic Advisory Board of CITCEM (Centro Interdisciplinar Cultura, Espaço, Memória) of the University of Porto, Portugal
- 2017 Referee of the Best dissertation at the Annual Conference of Economic and Social History – Portugal
- 2017 - 2023 Referee of Paper Submissions to the European Business History Association (EBHA)
- 2018 Peer Review Assessor for the Social Sciences and Humanities Research Council of Canada
- 2018 - 2023 Member of the Expert Reviewer Board of the British Academy
- 2018 Peer Review Assessor for the Carnegie Trust for the Universities of Scotland
- 2018 Expert Reviewer of REPRIS/MIUR – the Italian Ministry of Education, Universities and Research
- 2018 Commentator and Referee at the PhD workshop at the Business History Conference
- 2019 Commentator and Referee at the Tony Corley Paper Development Workshop, at the Association of Business Historians, Sheffield.
- 2019 Commentator and Referee at the PHD workshop, Kyoto University, 26 September 2019.
- 2020 Member of the Programme Committee of the World Congress in Business History, Japan-Online
- 2021 Expert Evaluator for Project submitted to the National Science Center NCN – Panel JS4, Poland
- 2021 Member of the Committee evaluating the best Dissertation in Economic and Business History Portuguese Association in Economic and Social History, 9-10 July 2021.
- 2020-2024 Chair of the Committee of the best Master Dissertation in Portugal awarded by the Bank of Portugal.
- 2023 Evaluator of Project submitted to the Deutsche Forschungsgemeinschaft (German Research Foundation) Germany.
- 2024 Member of the Academic Advisory Board of Social Sciences and Management at ISEG - Lisbon School of Economics and Management, University of Lisbon, Portugal.

Referee of articles submitted to the following journals:

- 1999 - date *Business History*
- 1998 - date *Business History Review*
- 2002 - date *Enterprise and Society*
- 2009 - date *Economy History Review*
- 2022 *The European Journal of Social Science Research*
- 2009 *European Management Journal*
- 2011 *German Journal of Business History*
- 2007 *Global Business and Economics Review*
- 2010 - 2012 *Historia Agrária*

2016	<i>Historia Económica e História de Empresas</i>
2014	<i>Historia Industrial</i>
2006 - 2016	<i>Industrial and Corporate Change</i>
2022	<i>Innovation: The European Journal of Social Science Research</i>
2008	<i>International Journal of Iberian Studies</i>
2022	<i>International Journal of Management Reviews</i>
2014	<i>International Small Business Journal</i>
2009	<i>International Studies of Management and Organization</i>
2013 - date	<i>Journal of International Business Studies</i>
2014	<i>Journal of Historical Research in Marketing</i>
2022	<i>Journal of Management Reviews</i>
2021 - 2022	<i>Journal of World Business</i>
2014	<i>Management and Organization History</i>
2014	<i>Organization Studies</i>
2021	<i>Regional Studies</i>
2021	<i>Revista CEM - Cultura, Espaço e Memória</i>
2018	<i>Scandinavian Economic History Review</i>
1998 - 2002	<i>Revista Douro</i>
2021	<i>The Historical Journal</i>

Membership of Professional Bodies and Organizations:

Member of Academy of International Business (USA) (1995-date)
 Member of the Academy of International Business – UK (2014-2020)
 Member of the Business History Conference (USA) (1998-date)
 Member of the Association of Business Historians (UK) (1998-date)
 Member of Asociación Internacional de Historia y Civilización de la Vid y el Vino (EU) (1995-2001)
 Member of Associação Portuguesa de História Económica e Social (Portugal) (1998-2023)
 Member of the Economic History Society (2018-2019)
 Member of European Business History Association (EU) (1998-date)
 Member of European International Business Academy (EU) (1998-date)
 Member of Grupo de Estudos de História da Viticultura Duriense (EU) (1993-2006)

Consultancies and provision of specialist advice to outside agencies

I was a consultant at Arthur Andersen from 1990 to 1993. During these first three years of my career I worked in corporate finance and financial auditing. When I left this multinational company to return to academia (to teach and with a grant do an MBA), I was a ‘Senior’, managing projects and teams of assistants. The industries in which I specialized while working for Arthur Andersen (in Lisbon and London) were - advertising, oil and gas, paints, tobacco, light electronics. My corporate finance work involved projects on mergers and acquisitions, and studies of new investment projects in the UK and abroad.

From 1993 until 1998, apart from teaching in the undergraduate degree at Universidade Católica Portuguesa, I also worked as a consultant in the Business and Economics Research Department at the same university. I did consultancy for the Portuguese government, for firms and other institutions such as cooperatives and industry associations. The industries involved were wines, shoes and apparel, textiles,

ceramics and porcelain, glass, and light engineering. A substantial part of this consultancy entailed providing advice for internationalisation strategies and investment projects for expansion of existing facilities, to be submitted to stakeholders and for governmental funding.

In 1998 and 1999 I worked for the Portuguese Department of Trade and Industry, acting as an advisor for on international programme which employed new graduates from Portugal, to work in foreign subsidiaries of Portuguese Multinationals. Additionally, I have also worked as advisor to the Portuguese Department of Trade and Industry on exports and other internationalisation strategies for port wine firms.

At Queen Mary I have worked as a consultant for Retroscreen Virology, advising the company on a international expansion strategy and also on market segmentation strategies, to better reach target customers. I also provided advice on brand management.

TEACHING, SCHOLARSHIP AND PROFESSIONAL PRACTICE

1. Teaching undertaken and evidence of teaching quality

i. Modules and Degrees Developed, Taught and Reviewed

Modules Developed and Taught

2009 - date

University of York

Recently taught:

- . Global Business Strategy, MSc degree (Lectures)
- . International Business Strategy, MSc degree (Lectures and Seminars)
- . Global Marketing, MSc degree (Lectures and Seminars)
- . International Business in a Global Context (Lectures and Seminars)

Other modules taught at the University of York since 2009:

- . Interdisciplinary Approaches to Management Research, PhD and MRes Programme (Lectures and Seminars)
- . Professorial Lecture Series to the Master's Programme, MSc Degree (Lecture)
- . International Business Environment, first year undergraduate degree (Lectures and Seminars)
- . Advanced Research Methods, third year undergraduate degree (Lectures and Seminars)
- . Understanding Arguments in Management (Lecture and Seminars, taught over 3 terms)

2003 - 08

Queen Mary, University of London

- . Multinationals and Global Business, MSc / MA degrees (Lectures and Seminars)
- . International Marketing and Strategy, MSc / MA degrees (Lectures and Seminars)
- . International Business, third year undergraduate degree (Lectures and Seminars)
- . Marketing, second year undergraduate degree (Lectures and Seminars)

2002 - 03

University of Oxford

- . Introduction to Management, Undergraduate Degree (Tutorials) – course taught over three terms to Economics and Management Students and also Engineering students

1993 - 98

Universidade Católica Portuguesa

- . International Business, Undergraduate Degree (Lectures and Seminars)
- . Corporate Strategy, Undergraduate Degree (Lectures and Seminars)
- . Business Policy, Undergraduate Degree (Lectures and Seminars)
- . Introduction to Management I and II, Undergraduate Degree (Lectures and Seminars)
- . Financial Auditing, Undergraduate Degree (Lectures and Seminars)

Degrees Developed at the University of York

As head of the Marketing Group (2008-2018) I developed/or coordinated with other colleagues the development of the following degrees:

- . MSc Global Marketing Degree – co-leadership role in design and coordination
- . BSc Marketing – leadership role and coordination
- . Online Degrees - modules relating to Marketing, Entrepreneurship and Leadership – liaison role

2. Wider involvement in the learning and teaching community, including leadership or professional recognition

i. Departmental/institutional responsibilities or roles held

- 2008 - 2018 Head of the Marketing Group, The York Management School (leadership role)
- 2009 - date Head of CEGBI – Centre for Evolution of Global Business and Institutions (leadership role)
- 2018 - 2022 Member of the Athena Swann Task Force at the York Management School (membership role)
- 2019 - 2021 Deputy Head of Research, The York Management School (leadership role)

ii. Contributions to the dissemination of good practice.

- 2001 Master Class Lecture, Universidade Católica Portuguesa, Portugal
- 2009 Research Away Day - Talk: How to apply for large research grants
- 2010 NARTI – Northern Training Programme – Organiser of the PhD workshop on Interdisciplinary Approaches to International Business. With Collaboration of Peter Buckley University of Leeds and Matthias Kipping York University, Canada (February 2010).
- 2010 Master Class Lecture, Copenhagen Business School, Denmark
- 2011 Master Class lecture, Utrecht University, The Netherlands
- 2011 Doctoral Colloquium, Association of Business Historians, UK
- 2011 - 2016 Annual Master Class Lectures, Birkbeck College, University of London, UK
- 2012 Master Class Lecture, Erasmus University Rotterdam, The Netherlands
- 2012 Undergraduate and Postgraduate Lecture, Universidade Federal do Parana, Curitiba, Brazil
- 2012 Master Class Lecture, University of Barcelona, Spain
- 2015 PhD Summer School of the European Association of Business Historians, Bocconi and Ancona, Italy
- 2016 Master Class and Undergraduate Lecture, Universidade Federal Fluminense, Rio de Janeiro, Brazil
- 2017 Master Class Lecture, University of Los Andes, Bogota, Colombia
- 2017 Master Class Lecture, Utrecht University, The Netherlands
- 2018 PhD Session, Kyoto University, Japan
- 2019 Master Class Lecture Erasmus, University Rotterdam, The Netherlands
- 2022 Master Class Lecture, City College, University of York – Europe Campus, Greece

- 2022 PhD Colloquium of the European Business History Association, Madrid, Spain
- 2022 PhD Workshop on Publishing in Business History, Business History Conference, USA
- 2022-2023 PhD Workshop Co-organizer, School for Business and Society/CEGBI Centre for Evolution of Global Business and Institutions
- 2023 PhD Colloquium of the Business History Conference, Detroit, USA
- 2024 PhD Summer School of the European Association of Business Historians, Crete, Greece (3-7 Sept 2024)
- 2025 PhD Colloquium of the Business History Conference, Atlanta, USA (forthcoming)

III. External Appointments

- 2009 - 2014 External Examiner for the Postgraduate Programme MSc in the Global Economy, University of Glasgow, UK
- 2009 - 2014 External evaluator of promotions for academics at Birkbeck College, University of London, UK
- External evaluator of promotions for academics at University of Leicester, UK
- External evaluator of promotions for academics at University of Reading, UK
- External evaluator of promotions for academics at University of Liverpool, UK
- 2010 Member of the External Evaluation Committee of Research of the Department of Management, Politics and Philosophy, at Copenhagen Business School, Denmark
- 2010 Member of the External Evaluation Committee of Quality Enhancement for Teaching and Learning, Management School, Birkbeck College, University of London.
- 2011 External subject specialist of the proposal for a new MSc Programme in Brand Management at the University of East London, UK
- 2011 External Subject Specialist of the proposal for the new MSc Programme in International Management at Birkbeck College, University of London, UK
- 2013 External Subject specialist of the proposal for the revised MSc Programme in International Business, University of Liverpool, UK
- 2012 - 2013 Member of the Appointments Committee for Assistant and Associate professors, Copenhagen Business School, Denmark
- 2012 - 2013 A3es – Member of the Evaluation Panel for Business and Management Studies for the A3es – The Agency for Assessment and Accreditation of Higher Education in Portugal.
- 2015 - date External Examiner for Elections of Faculty Members in Business and Economic History, Business and Economics School, University of Athens, Greece
- 2017 - 2021 Member of the Unilever Archives and Records Management Academic Circle of Advisers – Unilever Plc
- 2017 External evaluator of Promotions, Queen Mary, University of London, UK
- 2017 Member of the Hiring Committee for Associate Professor, University of Bergen, Norway
- 2020 Member of the External Evaluation Panel of the Research at Erasmus University, The Netherlands (March 2020)
- 2021 - 2022 University of Lisbon, Instituto Superior de Economia e Gestão (ISEG) - External Member of the Panel appointing Associate Professors in Economic and Business History.
- 2022 Nova Business School - External examiner for Full Professor Position, Universidade Nova de Lisboa, Portugal (June 2022).
- 2023 - date Member of the External Advisory of Board of the Centre for Social Sciences (CSG/GHES) at ISEG Instituto de Ciências Sociais, University of Lisbon.
- 2025 Member of the External Evaluation Panel of the Research, Erasmus University, The Netherlands (2025, forthcoming).

Teaching Nominations and Awards

In 2014, 2021 I received a Highly Commended Excellence Award for the Supervisor of the Year.

ADMINISTRATION, LEADERSHIP AND MANAGEMENT

Departmental Administrative Posts

At The York Management School:

- 2008 - 2020 Management of own Research Grants (including tasks such as panning work, as co-ordination of team, communication with ESRC, British Academy, Horizon 2020, etc).
- 2008 - date Founder and Head of the Centre for Evolution of Global Business and Institutions, The York Management School (leadership role)
- 2009 - 2018 Head of the Marketing Group at The York Management School, allocating workload, conducting annual performance reviews, etc.
- 2009 Designed the Website for the York Management School
- 2010 - 2015 Member of the Mitigating Circumstances Committee
- 2012 - 2018 Member of various Hiring/Appointment Committees at The York Management School (for the Marketing Group and International Business and Strategy Group)
- 2012 Member of the International Relations team headed by the Vice-Chancellor to Brazil
- 2013 Member of the International Student recruitment team to Brazil
- 2010/12/14 Designed a new MSc Programme on Global Marketing and redesigned parts of it afterwards
- 2014 Designed new BSc Programme in Marketing
- 2014 - 2018 Member of the Standing Committee that Represents the University of York near the National Railway Museum
- 2017, 2018 Designed Modules and coordinated the work of colleagues on Marketing related topics and Entrepreneurship for the new E-Learning MSc Programmes
- 2018 - 2021 Member of the Athena Swan Task Force, for the preparation of the accreditation report
- 2019 - 2021 Deputy Head of Research, The York Management School

I also attend regular School meetings such as the Undergraduate Teaching Committee, Postgraduate Teaching Committee, Board of Studies, Board of Exams, Research Committee, and Heads of Group/Heads of Programme Committee.

At Queen Mary, University of London I also had number of administrative roles at the Departmental and College levels. They included:

- 2003 - 08 Member of Faculty Board, Queen Mary, University of London.
- 2003 - 04 Member of the research committee and a member of the committee that launched the first masters MA and MSc programmes.
- 2003 - 08 Attracted and was responsible for hosting well established professors to visit Queen Mary, as a choice of institution for their sabbatical leave. I have attracted professors from Aarhus Business School, Denmark, Copenhagen Business School, Denmark, University of Malaya, Malaysia, University of Budapest, Hungary, Kantogakuin University, Japan, Universidad Carlos III, Spain, and University of California, Berkeley, USA.
- 2004 - 05 Organizer and coordinator of the Departmental Seminar series.

- 2005 - 08 Co-Director and founding member of the Centre for Globalization Research, Queen Mary University of London
- 2006 - 07 Member of the team which prepared the report on 'Quality of Learning Opportunities' to be included in the College Teaching Self Assessment Document.
- 2008 - 12 Deputy Director of the Centre for Globalization, Queen Mary, University of London.
- 2009 Speaker announcing and reading out the names of students graduating Masters' and PhD degrees at the Graduation Ceremony (December)
- 2012 Member of the Committee that visited Brazil as part of the Internationalisation Strategy of the University (September)
- 2012 - date Member of the Centre for Globalization Research, Queen Mary, University of London.

Other Work for External Bodies

This section excludes the work as president of the three leading Business History Associations (BHC, EBHA and ABH) as highlighted in 'Prizes and Distinctions', and also other external roles as highlighted in the sub-section on 'Organization of Conferences and Workshops, Member of Conference Programme Committees'

- 2002 - 13 Council Member and Webmaster of the Association of Business Historians
- 2004 - 05 Member of the Electronic Media Oversight Committee, Business History Conference
- 2004 - 07 Trustee (elected by the society members) of the American Business History Conference (BHC)
- 2006 - 07 Chair of the Electronic Media Oversight Committee, Business History Conference
- 2008 - 11 Chair and Member of the Investments Committee, Business History Conference (Chair of this Committee in 2009-2010)
- 2009 Chair of the Investments Committee of the American Business History Conference
- 2010 - 13 Treasurer of the Association of Business Historians (ABH)
- 2010 Member of the Programme Committee of the American Business History Conference
- 2011 - date Member of the Pool of Advisors of the Centre for Economics and Finance at Economics Faculty, University of Oporto
- 2011 ESRC - Facilitator of the ESRC Peer Review College Event on ESRC Policy, College Performance and Peer Review System, at London School of Economics.
- 2012 Founding Member of the Alliance of Centres of Business History in Europe
- 2015 - 16 Member of the Nominations Committee of the Business History Conference (BHC)
- 2015 - 21 Council Member of the European Association of Business Historians (EBHA), re-elected by the membership in 2018
- 2018 - 19 Chair of the Executive Committee, Business History Conference
- 2017 - 20 Chair in 2018-2019 and Member of the Budget Committee, Business History Conference
- 2019 - 20 Chair of the Nominating Committee for Trustees, Business History Conference (BHC)
- 2020 Chair of the Bank of Portugal Committee Awarding the Prize of the Best Master Dissertation written in Portugal (16 November 2020)
- 2021-2023 Member of the Interest and Planning Group for the World Congress in Business History in Toronto Canada 2025
- 2022 Chair of the Bank of Portugal Committee Awarding the Prize of the Best Master Dissertation written in Portugal (November 2022)
- 2023 Member of the Programme Committee of the Annual Conference of the European Business History Association Oslo, 24-26 August 2023.
- 2023 Member of the Committee of the History of International Business, Academy of International Business (AIB).

2023-2024 Chair of the 30th Anniversary Committee of the European Business History Association 2024.
2024 Chair of the Bank of Portugal Committee Awarding the Prize of the Best Master Dissertation written in Portugal (November 2024).

York, 26 October 2024