

# Engaging Science with Commercial Partners: The (Dating) Stages of a (Lasting) Relationship

**Abstract:** Engaging with commercial partners is increasingly required by public science funding agencies and encouraged by government officials. Reasons for this shift include alleviating the strain on government science budgets and opening up possibilities for scientists to secure jobs in private companies. Universities have also begun to advocate for strategies and policies that facilitate commercial collaborations. Similarly, there is interest—although still scattered in Portugal—among the business sector to look for “something different” in order to prepare for the complex problems that await in an uncertain future. This essay addresses the process of gaining entrée to a major Portuguese food retailer by making use of the metaphors of flirting and dating. The slow process of engagement with this retailer is described, in particular a two-day “backstage” visit of its food retail operations. During these interactions the challenges of commercial-science collaborations with regard to differing

expectations and objectives—in areas such as trust issues; confidentiality agreements; integrity of scientific objectives versus the pressures of market-driven organizations; the different nature and uses of information—are unveiled. The disparate conceptions of time and output delivery, together with the different rhythms of making business and making science, are discussed. To conclude, the “dating” and “flirting” stages of the relationship between social researchers and food retailers reflect a slow process that involves diplomatic skills, open minds, and the constant juggling of “familiar” and “unfamiliar” ways of thinking and doing.

**Keywords:** impact, terms of engagement, user engagement, commercial collaborations, food retailers.

THE PORTUGUESE GOVERNMENT HAS recently called on the national science community to engage more with industrial partners. Senior government officials bemoan the fact that scientific knowledge is not sufficiently shared for the benefit of innovation and industrial development in Portugal. As the country suffered through the difficult economic times that led to the application for an IMF/EU bailout in 2011, which program lasted until May 2014, there has been a decline in national science funding. In this context, academic engagement with commercial partners is seen as a response to the shrinking public budget for science. It is also seen as a way to increase job opportunities for scientists in industry and commercial organizations.

In a recent international evaluation of Portuguese scientific research and technological development units, the evaluation panel visited several units.<sup>1</sup> In my unit one of the evaluators asked whether fixed-term contract researchers might look favorably on the prospect of working in companies, as a way of addressing the increasing difficulty of getting tenured positions in research units and universities. Successful examples of corporate anthropology (Cefkin 2009) were provided by the panel, all from countries with strong and dynamic industrial and business sectors (not exactly the Portuguese

case), as a beacon of hope for the job insecurity problems of the country’s social scientists. The panel also raised several other questions about the engagement of researchers with commercial partners and whether that avenue was being sufficiently explored as a strategy to obtain research funding.

In a similar vein, the University of Lisbon is showing clear signs of consolidating its strategy for capturing the attention of the Portuguese agrifood industry sector. The university has recently created an agrifood network (of which I am a member) that brings together appointed representatives from departments and research centers from all scientific areas within the university that work on farming, food, and forests. One of the objectives of this network is the consolidation of stronger links between science and industry to mutually benefit knowledge exchange and to secure more funding for research at the university. Such engagements are still in their infancy: this network was created in 2014 after the merger of the (classical) University of Lisbon and the Technical University of Lisbon, resulting in the biggest university in Portugal and one of the biggest in Europe with fifty thousand students, eighteen schools, and almost six thousand staff. However, despite its early stages, this agrifood network has

already set up a series of engagement and knowledge exchange workshops between certain University of Lisbon scholars with expertise on food and large Portuguese companies in the agrifood and forests sector. Regarding these workshops, the terms of engagement and types of interactions between the university and industry are repeatedly debated at the agrifood network meetings, where concerns have been voiced about how to secure relative autonomy and freedom of academic research. These are valid concerns that should be critically reflected upon, given the changing character of academic institutions toward a corporate model of management that increasingly puts pressure on academics to seek commercial collaborations.<sup>2</sup> Thus, pressure for science to engage more with commercial partners is becoming a common feature of current universities' strategies, science policy, and quality assessment, not only at the national but also the international level (see the increasing importance of including commercial partners in the European Union's Horizon 2020 research proposals).

As pressure mounts to obtain alternative funding from private sector sources, a countermovement of academic scholars who frown upon the prospect of losing independence and integrity when engaging with commercial partners has become visible. Although such fears are legitimate, many tend to frame any form of commercial collaboration, type of interaction, and sponsorship as strong evidence of a pact with the devil. Blanket moral condemnation (as discussed in the Jackson and Evans essays in this volume) by scholars who are inexperienced in commercial collaboration can often occur because such scholars fail to fully understand the principles and building blocks of these collaborations. At other times, such condemnation is the result of previous frustrating experiences by skeptical scholars who were subjected to disadvantaged terms of engagement with commercial partners.

For example, my research unit experienced an episode (that went viral in the Portuguese media) when the director decided to put on hold the circulation of an issue of the journal hosted by my institute (*Análise Social*). A controversial graffiti was included in a visual essay and accepted by the editorial board, but found inappropriate for such a journal. The photo of the graffiti on a wall in Lisbon could be interpreted as mocking one of the commercial partners of the research unit. A hot debate around academic independence, the alleged protection of private sector interests by sponsored public institutions, and freedom of speech dominated the blogosphere and the media for several weeks. At one point, the collaborative contract agreement between the research unit and the private sector organization was thoroughly dissected by righteous moral pundits. Such dissection was

conducted without full knowledge of the context that informed the design of the terms of engagement, and ended up unfairly collapsing scholarship with consultancy (see Evans, this volume). The controversy eventually ended when the journal issue was finally launched as originally planned by the editorial board, with the inclusion of the infamous graffiti. This episode provided insight into the treacherous terrain of commercial collaboration and the caricatures that are often portrayed about such engagements.

In this essay I reflect upon these issues by exploring the process of gaining entry to a major Portuguese food retailer, Sonae MC, and the initial stages of building a relationship of trust. First, I briefly present the company and its business operations in the context of the Portuguese food retail market. Second, I describe the slow process of engagement with Sonae MC and the "dating" stages of the relationship. Third, I describe one particular event—a two-day "backstage" visit to the food retailer's operations—that can be considered an important breakthrough in the relationship. To conclude, I reflect on the "dating" and "flirting" stages of the relationship between social researchers and food retailers, arguing that it is a slow process that involves diplomatic skills, open minds, and a constant juggling between "familiar" and "unfamiliar" ways of thinking and doing.

## Sonae and Its Core Retail Business

Sonae is a major Portuguese retail company (with a turnover of €4.9 billion of annual revenue in 2014) founded in 1959 (Sonae 2014). Their businesses include, but are not limited to, the supermarket chain Continente Modelo and the convenience store chain Continente Bom Dia (both brands under Sonae MC). It is a key actor in the Portuguese food sector with access to important data regarding consumers' shopping habits (via their customer loyalty card) and historical consumer trends (through their archives that have data since at least the 1980s).<sup>3</sup> The 1980s were a turning point in the Portuguese consumer society with the country's accession to the European Economic Community in 1986 (currently the European Union). It also offers insights into the organization of retail operations and strategies to improve ecological sustainability and social responsibility, together with their business strategy at both national and international levels. Having access to these data offers an important and more robust understanding of the rise of consumer society in Portugal that would not have been possible otherwise. The supermarket chain Continente is one of the main and most trusted retail chains in Portugal (Figures 1 and 2).



FIGURE 1: *The Continente supermarket chain.*

PHOTOGRAPH BY MONICA TRUNINGER © 2015



FIGURE 2: *Continente's shopping carts.*

PHOTOGRAPH BY MONICA TRUNINGER © 2015

Thus, to understand Portuguese consumer society, one needs to take into account the important history of Sonae's retail operations and the leadership of one of the most iconic entrepreneurial figures of the Portuguese business sector—Belmiro de Azevedo. Undoubtedly, Sonae's retail operations were crucial to the opening up of Portuguese society (previously closed under an authoritarian political regime from 1933–1974) and to the increased product variety, convenience, quality, and safety standards.

### The Dating Phase: Flirting, Getting to Know Each Other, and Building Trust

It all started when the Institute of Social Sciences (ICS) organized a major conference at the Gulbenkian Foundation in

Lisbon during November 2012 to showcase the best quality research produced by ICS scientists across several topics. It was a major success, widely covered by the media (national TV, major newspapers, etc.). One of the topics of the conference (consumption trends over the last forty years) was covered in the talk I gave and reached Sonae headquarters in Porto, catching the attention of their business intelligence and strategic planning manager. A few days after the conference I was contacted by the manager, who asked me to send her the paper that supported my presentation on consumer society. Coincidentally, I received an email from the ICS director asking me to attend a meeting with the manager, who had also gotten in touch with the management board of ICS. The arrangement of the meeting was mediated and facilitated by an expert on market research who had previously worked with the director of ICS and who had offered marketing research services to Sonae. The meeting took place one late afternoon in December at ICS, during which the manager said she was looking for “something different” and beyond “data given by short-term market research/consultancy services.” A main concern was to gain a better understanding of consumer practices, so they thought that engaging with the best social science “intelligentsia” (as she put it) would give them a better opportunity to understand consumption and consumers, and consequently, Portuguese society more generally. At this stage, I was skeptical of science–industry collaborations given my lack of experience and my awareness of the frustrating experiences of some of my colleagues in such engagements. I thought: “They want to gain a bigger market share and sell more products to their customers.” Yet, I was prepared to listen to the manager's proposal and not jump to conclusions about the company's intentions. This opened up a space for multiple possibilities and types of interactions that can go beyond a caricature of polarized science–industry relationships. Sonae requested ICS collaboration to exchange ideas about the social and cultural aspects of Portuguese society and scenarios for 2030: consumption patterns; demographic trends; political values; family and youth; social inequalities and ethnic minorities; health and environment. At first, they asked for a report on those topics to be delivered within the next three weeks. Given the very tight deadlines of many ICS researchers, we suggested instead the organization of a series of knowledge exchange meetings at Sonae's headquarters between senior company staff and a few ICS experts.

After Sonae's representative left the meeting, we reflected upon the importance of engaging more with business partners, recognizing the difficulty of being on the same wavelength regarding outputs, delivery, and timing. Three weeks

can be perceived as an eternity according to business understandings of time, while for social scientists it can represent a tight schedule for delivering a report created from scratch and held to a high standard, especially when juggling other work commitments. We also discussed the challenge of engaging with business and the risks associated with such an engagement, where work quality can be compromised should companies exercise their bargaining power (as they already do with their suppliers) to maximize benefits and place their interests above those of researchers, thus posing a threat to academic independence. These are many of the arguments that critics make about science–business collaborations. Many are undoubtedly valid and legitimate in certain circumstances, but it is important to avoid condemning any type of engagement without fully understanding the building blocks of such collaborations. It is important to avoid tarring every type of relationship between science and industry with the same brush. Thus, despite the potential risks of these collaborations, trust building and mutual respect are crucial factors (as in any relationship).

While the collaboration between ICS and Sonae eventually tapered off a few months later due to the busy schedules of both parties (Sonae’s senior staff and certain members of the ICS team), some of the knowledge exchange meetings had taken place and were important for Sonae to gain a better understanding of the work of ICS. I decided to pursue another kind of collaboration with Sonae, given my interest in developing a research project on food and consumers’ perceptions about freshness across different retail operations (e.g. farmers markets, big and small supermarkets, corner shops) (Figure 3).



FIGURE 3: *Farmers market and fresh local foods on the outskirts of Lisbon, Portugal.*

PHOTOGRAPH BY MONICA TRUNINGER © 2015

I was also looking for a large retail company to better grasp marketing operations regarding fresh food. In the meantime I received good feedback from the market researcher who facilitated the meeting between ICS and Sonae, informing me that the business intelligence and strategic planning manager was very impressed with the informality of our meeting (we had asked her not to use our academic titles). She was particularly impressed with the fact that we did not seem to be “arrogant and distant” scientists, but instead were “humble and willing” to collaborate in order to know each other better. With such positive feedback I decided to take advantage of the momentum and move the “relationship” to another level, by using my best “flirting” techniques to arrange a lunch date with the manager and the market research facilitator, who had attended our earlier meeting.

In anticipation of the lunch, I remember thinking about how to explain my research in simple language without venturing too much into the conceptualization of consumers and consumption, let alone the concept of practice and its theoretical underpinnings (cf. Schatzki et al. 2001). I wanted to explain “the messiness of what people do and the way things actually transpire as culturally informing and constituted” (Cefkin 2009: 10). So the issue was not so much about getting sponsorship (this seemed to me an unattainable possibility at the time), but instead how to build a relationship of trust. The objective was to understand better the challenges of the science–business collaboration and creatively contribute to managing them. I was also very much interested in finding new spaces of knowledge exchange and intellectual curiosity. Gaining access to information that otherwise would be difficult to find was appealing, but more interesting for me would be “opening up the spaces within specific locations for new voices and new knowledge to engage with and define corporate agendas” (Blomberg 2009: 220).

During lunch we talked about retail business malpractices (e.g., the increasing power of retailers and the effects of the price/cost squeeze mechanism, which triggered small agri-food businesses to cease their activities and leave the market), topics that have enjoyed scholarly attention in agrifood studies since the 1990s and well into the 2000s (Goodman and Watts 1997; Morgan et al. 2006; Cloke et al. 2006). Sonae’s business intelligence and strategic planning manager clarified that it is not quite like that today. I mentioned that in order to know exactly how it is and to offer a different perspective on today’s retail operations, I would like to have the opportunity to shadow their work activities for a week or so and understand better how they organized their operations, for instance, around fresh foods and the cold chain. She agreed to organize a two-day visit to Sonae MC’s backstage

activities, with visits to particular company sites to look at their cold-chain operations (e.g., meat and fish, fruit and legumes regional center, refrigeration technologies, and energy efficiency practices).

### A Foot in the Door: Unlocking the Potential of a (Lasting) Relationship

After two months of negotiating possible dates, a schedule was presented and permission was granted for a two-day visit at the end of May 2013, during which I would be accompanied by someone from the close circle of the business intelligence and strategic planning manager. A young man picked me up at the lobby of Lisbon Sonae's offices and we went off by car to start the two-day visit. We visited the Regional Distribution Center for fruit and vegetables and the Meat Production Center, together with exploratory interviews with managerial staff of Sonae's commercial operations for fruit and vegetables, fish, meat, own-label product development and marketing, and with senior staff in engineering and equipment to observe their refrigeration technologies and energy efficiency operations. Each interview and visit was strictly timed and coordinated according to the availability of the staff. In research interviews I was not allowed to talk with staff without the young man in attendance. Despite having a passive presence, simply observing and listening to my questions, he was an important gatekeeper of the information passed on to me. At one point in the visit to the Meat Production Center I had to dress in a white suit and wear a protective mask, gloves, and special shoes to enter a particular section. I was made to feel privileged to have access to such a secluded area when the guide who was showing us around told me: "Very rarely do we have visitors here... you are the first one in a very long time." This visit was timed with the change of shifts between teams during the lunch break and I was not able to see the team in full action, butchering and preparing the meat to be packed. I remember asking myself why they did not want me to see this part of the meat processing operations, but this was clearly a way of controlling (or denying) access to information in a subtle way. At one point the guide said: "It is a pity you cannot see much because we are in the middle of shifting teams, it is lunch time now, but imagine this room packed with staff." When we exited the room we bumped into the new team arriving, among whom were a few men of black African origin. Had we delayed our entry in the room for a few minutes or so I could have caught a glimpse of the full team in action.

All in all, it was a very rewarding experience, entering a world that was very distant from my everyday academic experiences. I gained some privileged insights (although controlled) into the retail operations and organization of the cold-chain of that particular retailer, but also in my corporate encounters I had the opportunity to undo some misconceptions and caricatures about corporate culture. Although it is in their interests for corporate representatives to come across in a positive light, the enthusiasm of some young representatives in explaining their operations' efforts with regard to energy efficiency, sustainability, and social responsibility made me realize that perhaps there might be something beyond the old business green rhetoric that Steven Yearley poignantly described in *The Green Case* (1991). Several environmental social surveys offer evidence that young people in general are more knowledgeable about environmental issues than elderly people are (Schmidt and Delicado 2014). There is certainly more research needed to unpack the links between "green" values, corporate culture, and young people in order to gain a better interpretation of such "enthusiasms," but corporate environmental responsibility is something to which businesses are increasingly paying attention. Undoubtedly, the financial benefits of becoming "green" are important in this equation (Babiak and Trendafilova 2011). Sonae's energy program — the Trevo project — saved the company €4 million through energy efficiency measures. They certainly see "value" in making their operations more sustainable, and their activities can be deemed part of a green growth or green economy perspective. Despite a critical approach regarding green economy "business as usual" practices (Bina 2013), I argue that the "greenwashing" business context of the 1990s is insufficient to explain some of the corporate ethos found in twenty-first-century business operations. Instead of dismissing this as a cynical PR exercise social scientists should investigate other large corporate organizations regarding the role of young and dynamic entrepreneurs in changing business practices toward sustainability, social responsibility, and ethics.

During car conversations with my guide we also discussed disparate conceptions of time and output delivery, in both business and science practices. I explained a day at work in a university or research center office and he described a day at work in a large firm's office. Different rhythms of "making business" and "making science" were apparent in such exchanges, with my guide explaining how he had to deliver thirty-page reports in a short time (sometimes in two days), crunching numbers mechanically without much intellectual input. The aim was purely instrumental and to help make a quick decision (e.g., a new investment, a contract with a supplier). There was also an effort at mutually understanding the

different ways of working and thinking. Those car conversations shifted between debating different work ethos, in business and science organizations, and then lighter moments, such as when each of us told of our separate experiences traveling to New Zealand. True warmth filled our conversations, making us realize that we were not caricatures (“heartless exploitative capitalists” or “out of touch stuck-up scientists”), but were actually made of flesh and blood. In the midst of a certain unfamiliarity of doing and thinking there was some familiarity after all.

After the visits we exchanged ideas on how to keep the collaboration alive. Sonae MC agreed to provide in-kind support to a research proposal on fresh food and to participate in a summer school on food studies held at ICS in 2014. The proposal is currently under evaluation, so the outcome of that will decide whether we are able to undertake further engagement on matters of research regarding the topic of freshness. As for the summer school, a last-minute commitment prevented Sonae’s representative from being able to attend this event, despite their previous agreement. However, an unpredictable turn of events took place while this paper was under review. A colleague of mine and I have each received an invitation from Sonae, which owns Continente supermarkets, to attend the Advisory Board of the Continente Mission. This is a new brand that includes all Continente’s initiatives and activities on Sustainable Development and Social Responsibility, launched in June 2015. This is a promising venture that may open up further possibilities for commercial collaboration between ICS and Sonae, wherein concerns regarding the terms of engagement will, yet again, be revisited and discussed, but in a different forum.


## Conclusion

During my attempts at gaining entry to a commercial partner—Sonae, a large retail company in Portugal—I encountered disparate conceptions of time and output delivery, together with different rhythms of “making business” and “making science.” The dating and flirting stages of the relationship were important steps that defined further incursions in the organization, where trust was paramount. Such incursions helped dissolve mutual misconceptions and caricatures around scientists and business entrepreneurs, but also were important in making visible the uneven “power-geometry” (see Jackson, this volume) of such relationships, such as when limits of access to particular areas of Sonae’s backstage operations were subtly set. This highlights the asymmetric power of such collaborations. The interests that drive these relationships and

approaches are very different, so, in some cases, marriages are more for advantage than for love. This particular commercial collaboration developed very slowly, and such a slow return period is also justified by this asymmetry of power, in which only one side actually has the decision-making capacity to move the relationship forward.<sup>4</sup> However, it was important to be tenacious, exercising diplomatic skills, maintaining an open mind, and constantly juggling “familiar” and “unfamiliar” ways of thinking and doing. The invitation to be part of the Advisory Board of the Continente Mission may be a step forward in the relationship.

Engaging with commercial partners is increasingly required by public science funding agencies and is encouraged by government officials as a means of alternative funding. Some of the rationale for this revolves around alleviating government science budgets and opening up possibilities for securing job positions for scientists in private companies. Moreover, universities are increasingly advocating strategies and policies that facilitate commercial collaborations, such as the example of the agrifood network at the University of Lisbon. Similarly, there is some interest—although still scattered in Portugal—among the business sector in looking for “something different,” in order to get an edge on their competitors. Looking for partners in university and science research units is a way to seek innovative thinking and improve industrial operations, as many corporate anthropologists have demonstrated (see Cefkin 2009). But it is also a way of obtaining more sophisticated data analysis and additional help in understanding complex contemporary societies, to be better prepared to face difficult problems and uncertain future trends (especially since the 2008 financial crisis). Furthermore, ensuring social legitimacy may partly account for the way corporate business are increasingly interested in including university experts to advise them in their activities and initiatives around sustainable development and social responsibility, as the recent invitation to join the Advisory Board of the Continente Mission demonstrates. This also shows the growing strength of civil society pressure, in that, beyond a drive to secure greater profits, companies appear to be interested in responding to external pressure to change perceived malpractices.

From my recent involvement in different platforms of commercial collaboration (e.g., the University of Lisbon agrifood network, the Continente’s Advisory Board), although still in their early stages and not yet reaching the “impact” phase, I have already noticed that there is a willingness among participants to openly discuss the pros and cons of such collaborations. Instead of dismissing commercial collaborations as dangerous ventures and pacts with the devil—as

also crossed my mind when I rushed to conclusions regarding Sonae's intentions when they first contacted us—academics are starting to think more carefully about the implications of such engagements for their research practices and their institutions. Even if misconceptions persist and caricatures proliferate, because this is an “elephant in the room” topic, everybody seems to have a view. Such debates may lead to an increasingly critical reflection on these collaborations and on the implications of “impact” on researchers' and universities' autonomy. These critical reflections may help put in place more rigorous institutional standards and practices in order to facilitate more constructive commercial engagement with retailers and other agrifood businesses. 

#### NOTES

1. This international evaluation was funded by the National Science Foundation in Portugal (FCT), involving the European Science Foundation and their panel of international social scientists in the peer review process.
2. I would like to thank one of the referees for bringing up this important point.
3. These are privately owned archives that require permission from the company to gain access. Any citizen can access the company archives as long as they justify their purpose in consulting them.
4. I would like to thank my colleague João Ferrão for bringing up this point when commenting on a previous draft of this essay.

#### REFERENCES

- Babiak, Kathy, and Sylvia Trendafilova. 2011. “CSR and Environmental Responsibility: Motives and Pressures to Adopt Green Management Practices.” *Corporate Social Responsibility and Environmental Management* 18(1): 11–24.
- Bina, Olivia. 2013. “The Green Economy and Sustainable Development: An Uneasy Balance?” *Environment and Planning C: Government and Policy* 31(6): 1023–47.
- Blomberg, Jeanette. 2009. “Insider Trading: Engaging and Valuing Corporate Ethnography.” In *Ethnography and the Corporate Encounter*, ed. Melissa Cefkin, vol. 5, 213–26. New York: Berghahn Studies in Applied Anthropology.
- Cefkin, Melissa, ed. 2009. *Ethnography and the Corporate Encounter*, vol. 5. New York: Berghahn Studies in Applied Anthropology.
- Cloke, Paul, Terry Marsden, and Patrick Mooney. 2006. *The Handbook of Rural Studies*. London: Sage.
- Goodman, David, and Michael J. Watts, eds. 1997. *Globalizing Food*. London: Routledge.
- Morgan, Kevin J., Terry K. Marsden, and Jonathan Murdoch. 2006. *Worlds of Food: Place, Power and Provenance in the Food Chain*. Oxford Geographical and Environmental Studies. Oxford: Oxford University Press.
- Schatzki, Theodor, Karin Knorr-Cetina, and Eike von Savigny, eds. 2001. *The Practice Turn in Contemporary Theory*. London: Routledge.
- Schmidt, Luisa, and Ana Delicado, eds. 2014. *Ambiente, alterações climáticas, alimentação e energia: a opinião dos portugueses*. Lisboa: Imprensa de Ciências Sociais.
- Sonae 2014. *Sonae Financial Report 2014 – Management Report*, in <http://www.sonae.pt/en/investors/financial-data/> accessed 12<sup>th</sup> June 2015.
- Yearley, Steven 1991. *The Green Case: A Sociology of Environmental Arguments, Issues and Politics*. London: HarperCollins.