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When is a publishing business truly 'global'? An analysis of a Routledge case study with reference to Ohmae's Theory of Globalization

Abstract

This study first reviews the writing of the management theorist Kenichi Ohmae, before assessing the potential application of his theory of global commercial maturation to the strategies adopted by the academic publishing company, Routledge, and its precursor imprints between 1960 and 2013. Based on the analysis of interviews carried out between 2011 and 2013 and supporting document analysis, the paper concludes that, with some caveats, the stages of globalization identified by Ohmae are of considerable explanatory value for students and analysts of global publishing as well as offering strategic insights to managers of academic publishing houses.

Keywords: Kenichi Ohmae, Publishing, Publishing theory, Academic publishing, Routledge, Taylor & Francis, Globalization, Publishing history, Publishing strategy, Global strategy, Five Stages of Globalization

Introduction

Aims and hypothesis

In this paper, my aim is to test the hypothesis that a theory of globalization in business developed by Kenichi Ohmae in the 1980s and 1990s (1987, 1993a) offers an explanatory tool of potential value to the analysis of the global activities of contemporary commercial academic publishing organizations, both in their commercial structures, and as participants in contemporary digital information exchanges.

After briefly outlining Kenichi Ohmae's other contributions to globalization theory and the scholarly debates associated with his work, I outline his Five Stages of Globalization model, first defined in his book *Beyond National Borders* (1987, pp. 35–9). I then review interview and other data to explore its explanatory value, focusing on the activities of the commercial academic publishing company, Routledge, and its precursor imprints since 1960.

This study concludes that, with some important caveats, Ohmae's Five Stages of Globalization Theory, though it has attracted little critical attention to date, offers explanatory benefits to understand the effects of the increasing globalization of the academic publishing industry during the period studied. Consistent with the aims of Ohmae's own writing (reviewed below), this study also suggests that the model may be of strategic benefit to managers of academic publishing houses who are responsible for making.

Methodology

This paper draws first upon a literature review of Ohmae's own writings and of the status of his work within the management studies and globalization literatures, before analyzing a case study of the academic publishing house Routledge (2013a), part of Taylor & Francis (T&F) Ltd (T&F, 2013), one of the largest global commercial publishers of books and journals in the academic disciplines of the humanities and social sciences. See also Kernan (2013), which presents a historical case study of the company between 1980 and 2010. The current paper draws upon analysis of 15 semi-structured interviews conducted between 2010 and 2012 with an expert sample of previous and current managers within the company; subsequent email exchanges with the respondents; document analysis (including of web resources) conducted in 2012 and 2013; further interviews in 2013; and email exchanges with the respondents in response to a draft of this paper.

Ohmae's contributions to management theory

This section positions Kenichi Ohmae's contributions to management theory within the literature relating to management and globalization.

Introduction

Ohmae worked for 23 years until the mid-1990s as a management consultant, including as head of the Tokyo office of the major US firm McKinsey's. His books in English (including Ohmae, 1982, 1985, 1987, 1991, 2000, 2001 and 2005) represent a much larger body of work published in Japanese, reportedly over 100 books in number (Leigh Bureau, no date), in addition to his frequent papers and journalistic writings. He is regarded as one of the few major management thinkers to emerge from Japan (Hindle, 2008).

In common with other management writers (eg Porter, 2008), Ohmae's aim was that his writing should inform managers' strategic decision-making, drawing on his own experience as a management consultant and analyst of current commercial trends. In the preface of his 2001 book, for example, with reference to his focus on what he saw as a global, largely virtual 'invisible continent', he stated his intentions in these terms:

It is my sincere hope that as a result of this book, people will understand better how to go about staking a claim on the new continent in a sustainable way. Fewer people will fall prey to the losses of the gold rush – or the devastating losses that will accrue to those whose leaders ignore the new continent altogether. (Ohmae, 2001, p.12)

The Cs of global strategy, the Borderless World and the rise of regional economics

Ohmae is most frequently cited for his definition of three key 'Cs' for business success (first published in Ohmae, 1982): Customer, Corporation and Competition. In other of his writings from the 1990s onwards, Ohmae added a fourth and fifth, Country and Currency (Ohmae, 1990a, p.23), with an emphasis on what he saw as the increasingly 'borderless economy'. His main focus remained on the C for Customer. In order to understand the newly brand-conscious global consumers, Ohmae recommended that success would be achieved by 'adopting a stance of equidistance from the customer base' (Ohmae, 1990a, p.25), with the aim of becoming aware of regional distinctions in consumer preferences, especially in key markets. Citing examples of differences in national taste and business conditions such as distribution channels, he argued that 'The key to success in understanding the customer is an inquisitive mind and repeated questioning': he urged managers to keep questioning 'current practice' within a company and individual markets (Ohmae, 1990a, p.27). Corporations, he also urged, should look for partnerships in order to enter key markets, as local partners would thoroughly understand the needs of local markets:

Alliances are not tools of convenience. I maintain that they are important, even critical instruments for serving customers in a global environment.... Meeting customer needs is the

key, and the customer does not care where the technology or the product comes from. If he wants it, he has to have it, more or less at the same time as it available everywhere else.... Globalisation will not wait. (Ohmae, 1990a, p.29)

Ohmae's work has attracted most critical review and attention with relation to his fourth and fifth Cs, Country and Currency. Most controversially, he identified transnational corporations as the drivers of economic health for host nations as well as their originating countries; called for an end to protectionist national economic policies and practices (a particular issue at the time in his home country, Japan); and urged corporate managers to recognize the increasing economic power and importance of key economic regions or hubs, either beyond or within nation states (Ohmae, 1990b, 1991, 1995a, 1995b, 1999 and 2005).

Despite his inherently functionalist approach and sympathetic stance towards business, Ohmae called on corporations to act in ways that do not only serve the needs of their shareholders. To be truly global, corporations must also challenge their personnel practices, hire locally, and behave towards employees and customers with equal respect for their corporate and human values:

A corporation is a social institution whose responsibilities extend far beyond the well-being of the equity owners to giving security and a good life to its employees, dealers, customers, vendors and subcontractors. (Ohmae, 1990b, p.16)

The Interlinked Economy, the Interconnected Age and the Cyber Dimension

In his earlier writings (including Ohmae, 1985), Ohmae identified the economies of the 'Triad' as the key engines of the global economy, ie the US, Japan and Europe. Into the 1990s and beyond, he extended this analysis to emphasize instead the 'interlinked economy' (ILE), a movement towards 'a world without borders' (Ohmae, 1999, p.xvi). His more recent analyses argued for the increasing economic dominance of regions such as Hong Kong/southern China, the Growth Triangle of Singapore, Pusan (in southern Korea), Research Triangle Park in North Carolina, and Wales; cross-border regions such as Catalonia and the 'Baltic Corner'; and also some countries including Malaysia, Ireland and New Zealand (2005, pp.255–68). Most controversially for his critics (see below), he argued that this commercial logic increasingly spelled the end of protectionist economic politics between nation states:

This ILE has become so powerful that it has swallowed most consumers and corporations and made traditional national borders so faint as to be almost invisible. What's more, it has pushed bureaucrats, politicians and the military toward the status of entities in decline. (Ohmae, 1999, p.xiv)

He argued that the role of government must change to reflect these new realities:

In this brave new borderless world, there remains a role – albeit it a diminished one – for government. And that is to educate the workforce; to protect the environment; and build a safe and comfortable social infrastructure. (Ohmae, 1999, p.xvi)

Ohmae's publications since 2000 have also grappled with the impact of information networks. *The Invisible Continent* (2000, 2001) considered the necessary conditions for global economic success in the Internet era by exploring the drivers and impacts of the 'Information Economy'. He saw these as being so profound that they took the activities of global business – and especially the capital markets – beyond national jurisdictions.

Observers might be forgiven for not fully realizing the potency and prevalence of the global economy. It is largely invisible.... It is because the actions that it performs often take place not on the streets or the debating chambers of national parliaments, but on computer terminals. (Ohmae, 2005, p.22)

In this new global, interactive economy, he saw 'platform' as crucial:

The rise of Internet usage was accompanied by internal and endogenous developments. One was the rise of the portal site, a three-dimensional signpost on the World Wide Web that could bring together those offering products and services. Platforms were then developed that would allow customers and vendors to trade efficiently and confidently.... (Ohmae, 2005, p.130)

He also argued that the English language had itself become a 'platform' through the joint impact of global business and the Internet. His interest in the role of English lay less in the historical or colonial roots of English as a global language or associated arguments that it functioned as 'a cover for Americanization' (Ohmae, 2005, p.133), and more on the impact and benefits of its dominance as the language of the Internet, news and business:

Put at its simplest, no one can aspire to success (maybe not even to compete in the global economy) unless they do so through English. They should see this not in terms of old-style subjection to an element of the nation state, but as possession and utilization of the linguistic platform of the global economy. (Ohmae, 2005, pp.134–5)

He cited one example of a global company which is of particular relevance to the publishing industry: Amazon. In Ohmae's terms, Amazon had built a strong 'platform' in the global economy – an economy which, he argued, operated largely invisibly (as the 2012 UK House of Commons hearings into Amazon's tax liability relating to their UK business, alongside Starbucks and other global companies, could be said to confirm; see for example Flood, 2012).

Amazon, he argued, offered a compelling example of how global organizations operate within the Information Economy, by grasping the potential to meet consumers' needs in a new way:

Shopping in cyberspace is like going on a blind date. As such, books and airline tickets were the first on board. There are no two seats with the same code and no fears of getting the same title with less quality when you buy a particular book. (Ohmae, 2005, p.129)

Ohmae's most recent publications consist of presentations to conferences (including Ohmae, 2006), teaching material for his own Management School in Japan (Business Breakthrough Ltd, no date), and analyses of the implications of the Fukushima nuclear disaster of 2011 (eg Ohmae, 2012). This study has also reviewed articles drawn from interviews with Ohmae (including Heilemann, 2005); his video postings in English on YouTube (some of which in August 2013 had attracted tens of thousands of hits, with a Kenichi Ohmae YouTube Channel established in 2013 (Ohmae, 2013)). The following for the Twitter presence maintained in his name, @ohmaebot, which in August 2013 had over 100,000 followers (Ohmaebot, 2013), also confirmed his continuing status in Japan.

Ohmae's Five Stages of Globalization Model

The main theoretical focus of this paper is Ohmae's Five Stages of Globalization model, first outlined in his book *Beyond National Borders* (1987, pp. 35–9) under the heading 'Evolution of a multinational corporation'. With examples drawn from his own consultancy experience, and therefore relating primarily to American multinationals and the Japanese commercial environment, he described it as a development of McKinsey's 'business system', and as such 'a mnemonic for

breaking down a company's operations into its major functions and activities – basically R&D, manufacturing, sales, and service' (1987, p. 35).

In 1993, Ohmae redefined the model for a BBC Executive Videos management training product. Designed for facilitator-led sessions in executive training seminars and business schools, and developed in partnership with Henley Distance Learning Ltd, the video package was entitled *Globalisation with Kenichi Ohmae* (BBC Executive Video Seminars, 1993a, 1993b and 1993c). In the video introduction (BBC Executive Video Seminars, 1993c), Ohmae stated that the model summarized in Table 1 should be seen as a hierarchical progression from Stage One to Stage Five. In answer to the question, 'How important is it for a corporation to have, to develop a global strategy?', Ohmae replied:

It's almost a matter of survival... If you are [a] company focused on the United Kingdom or Germany or Japan only, your development cost, the fixed investment in manufacturing, brand investment, all these investments, will have to be amortized over that country's market size. And if in the case of Japan it's only 120 million people, that's not enough – because if your competition has the capability to amortize the fixed cost of R&D and manufacturing over 700 million people, the fixed cost goes down relatively, and you cannot compete with a company which is globalized. (Ohmae, 1993c)

Table 1 *Kenichi Ohmae's Five Stages of Globalization Model*

| Model definitions (Source: BBC Executive Video Seminars 1993a, p.28) | Questions to assign an organization's global stage (Source: BBC Executive Video Seminars 1993a, pp.43–50) |
|---|---|
| 'Stage One – Export-Orientated Company' A company which expands from its home production base to export markets using dealers, distributors or agents.' | <ul style="list-style-type: none"> • 'Does the company have its own overseas sales operation, or is it carried out by an agent or other third party?' (BBC Executive Video Seminars, 1993a, p.43) |
| 'Stage Two – Overseas Branches' The company starts to set up its own sales, marketing and, perhaps, after-sales service in foreign markets.' | <ul style="list-style-type: none"> • 'Where does the company operate central functions like R&D, marketing and the like?' (BBC Executive Video Seminars, 1993a, p.43) |
| 'Stage Three – Relocating Production' The company re-locates production to key markets.' | <ul style="list-style-type: none"> • 'Does the company manufacture overseas?' (BBC Executive Video Seminars, 1993a, p.43) • Where does a company locate its manufacturing, and why: is it primarily to achieve lower prices to compete in its home market (which would then define it as a 'multinational' rather than global company) or to meet the needs of other markets? (BBC Executive Video Seminars, 1993a, p.48) |
| 'Stage Four – Insiderisation' The company creates complete "clone markets" of the parent in overseas markets, enabling a complete local response to local consumers by being able to both analyse consumers and to tailor local products to their needs.' | <ul style="list-style-type: none"> • How does it organize itself in countries other than its home market, eg which functions are managed locally; to what extent are the needs of local markets considered in developing and marketing new products; and how closely does it work with strategic local partners? • Does the company 'use local management, local people and local culture'? (BBC Executive Video |

| | |
|--|---|
| | Seminars, 1993a, p.48) |
| <p>'Stage Five – The Global Company Ohmae says that at this stage some common core functions “consolidate back to the centre” to provide the business with “common shared values” – the global aspect – whilst maintaining the ability to provide a specific local service. Operations remain “dedicated to local management”, but there is global control of areas such as R&D, brand development and so on.'</p> | <ul style="list-style-type: none"> • 'What functions are centralised in Stage Five which may be de-centralised in other stages? Why is this done?' (BBC Executive Video Seminars, 1993a, p.50) <p>'Kenichi Ohmae suggests that a company is fully global when the CEO confirms that equal weight of response is given to a problem with a major overseas client as would be given to a problem with a major domestic one.' (BBC Executive Video Seminars, 1993a, p.50)</p> |

In his book *The Borderless World*, Ohmae offered this description of the distinguishing features as well as the organizational challenges involved in achieving global maturity, not least by developing 'commonly held beliefs' which 'can immunize managers against “going native”' (Ohmae, 1999, p. 97):

Getting to Stage 5... means venturing onto new ground altogether. To make this organizational transition, companies must denationalize their operations and create a system of values shared by company managers around the globe to replace the glue a national-based orientation once provided.... In a genuinely global corporation, everyone is hired locally. No matter where individuals in an amoeba-like structure are, they can communicate fully and confidently with colleagues elsewhere. Building this level of trust takes time because building shared values takes time. (Ohmae, 1999, p. 98)

Review of Ohmae's contribution to management studies and public policy research

This study has confirmed that Ohmae's work continues to inform research in management studies, policy studies and international economics. For example, in an article in the *MIT Sloan Management Review*, Wind cited Ohmae's definition of 'the next global stage' (Ohmae, 2005) in his 2008 analysis of marketing strategies to support corporate global expansion, especially in 'China, India and other emerging economies', especially to grasp the opportunities of online marketing:

The era of the passive consumer is history. Empowered consumers are increasingly in control, which dramatically changes the role of marketing. This shift in relationship between consumers and companies is the most fundamental change in the history of marketing, even more dramatic than the historic shift from a product orientation to a market orientation. (Wind, 2008, p. 21)

Writing within the discipline of international economics, Rugman and his co-authors (eg Rugman, 2005; Rugman and Verbeke, 2004) drew heavily upon Ohmae's 1985 *Triad Power* thesis that the majority of global investment at the time was occurring in the US, Europe and Japan. With caveats in terms of extending their argument to consider the role of the EU, ASEAN, China and other regions, Rugman and Verbeke (2004, p. 4) argued for the 'enduring importance' of Ohmae's Triad thesis. They analyzed geographical patterns in the sales of 380 of the Fortune 500 companies in 2001 to test 'whether the world's largest firms have been capable of implementing Kenichi Ohmae's visionary strategy and becoming (broad) triad powers during the two decades after his path-breaking [1995] book' (Rugman and Verbeke, 2004, p.5, referring to Ohmae, 1985). They concluded that few of these major companies had established truly 'global' activities.

A subsequent study carried out by Flores and Aguilera (2007) was however critical of both Rugman and Verbeke's and Ohmae's analyses. In their empirical analysis of the location choices of US multinationals in 1980 and 2000, Flores and Aguilera concluded that 'the highest percentage change

in US foreign investments over time (35%) [was] outside the TRIAD countries (Europe, US and Japan)' (2007, p. 3), and that changes in these MNCs' location choices were correlated to both national GDP and the size of population (2007, p. 17).

For students of international economics, Letto-Gillies (2002, p. 172) confirmed Ohmae's contribution to the globalization debate as falling within the 'liberal political agenda' and representing the 'hyperglobalist thesis' (2000, p. 16). She contrasted his views with the 'sceptic thesis' of Carnoy *et al.* (1993), Hirst and Thompson (1996) and Kozul-Wright and Rowthorn (1998). She characterized Ohmae's approach as describing a discontinuity with past conditions, driven by market forces, with a concentration 'on the economics of globalisation and specifically on growth in the flow of economic transactions' (Letto-Gillies, 2002, p. 163).

Ohmae's generally positive view of globalization is at odds with much of the commentary from international economics on the impact of globalization (eg Stiglitz, 2002). Writing for students of global economics, Hirst *et al.* (2009, pp.85–6 and 127–8) described Ohmae as the clearest spokesman for the 'strong globalization thesis' that national boundaries are increasingly irrelevant in the global era – an argument of which they were strongly critical. The difficulty with Ohmae's position for Hirst and his co-authors was that the economic evidence did not confirm the patterns he defined, and a more accurate analysis of the complexity and variation of the international economy demanded a critical perspective:

To the extent that a globalized economy exists at all, it is organized *oligopolistically*, not according to the dictates of the perfectly competitive model as Ohmae and others wish to believe (cf. Gray 1998). The major players are involved in a deadly competitive game, deploying all manner of business strategies to exclude some competing players from their networks while locking others firmly into them. (Hirst *et al.*, 2009, p.86)

The same authors (Hirst *et al.* 2009, p.127) drew parallels between Ohmae's theory and the scholarship of Manuel Castells. In 2004, for example, Castells also argued for the replacement of traditional state power in the networked era:

From the globalization and networking of both business and social movements, resulted the crisis of the nation-state of the industrial era. In sum, from the interaction between three originally independent processes (the crisis of industrialism, the rise of freedom-oriented social movements, and the revolution in information and communication technologies) emerged a new form of social organization, the network society. (Castells, 2004, p.33)

Writing within a policy studies framework, Reich (1990) also argued for the reality of a global marketplace, citing supporting examples of companies such as Sony and Mitsubishi, and the global market for goods manufactured in the US by non-US corporations then sold outside the US (1990, pp. 57–8). Further echoing Ohmae, his analysis also emphasized the state's role in developing the skills and education of its workforce, and the overriding impact of the global economy (Reich 1990, p.63). Reich was also, however, critical of aspects of the current conditions of what he saw as 'Supercapitalism', in which 'Large firms have become far more competitive, global and innovative' (2007, p. 7). Addressing a primarily American audience, he argued that, at the same time as enjoying the extended consumer choice this has offered, 'In our capacities as citizens seeking the common good... we have lost ground' (2007, p.7). Citing examples of the American public outcry against the

activities of Yahoo and Google in China in the early 2000s, and US politicians' public but fruitless criticisms of the global and domestic labour policies of Wall-Mart, Reich concluded that the values of supercapitalism and democracy could only be reconciled through citizen-initiated government action, to outweigh the over-riding commercial demands on corporations. In terms consistent with Ohmae's definition of the impact of global consumer choice, and a similar emphasis on the potential for political action, Reich wrote:

The only way for the citizens in us to trump the consumers in us is through laws and rules that make our purchases and investments social choices as well as personal ones. (Reich, 2007, p.42)

Though his work has also attracted criticism, this brief review confirms that Ohmae's writing continues to influence scholarship and debate, especially with reference to the strategic management of global corporations. It also suggests that few previous studies have sought to assess the explanatory potential of his Five-Stage Globalization Theory (BBC Executive Video Seminars 1993a, p.28). A recent review of globalization theories, however, confirms that its benefits have to date been seen in strategic rather than analytical terms:

The benefit of Ohmae's model is not to prescribe a correct path for development, but rather to identify the different challenges faced by companies depending on how they attempt to do business in the global environment. (Steers and Nardon, 2005, p.17)

Findings and analysis: Routledge

This section reviews findings from a research project relating to the academic publishing house Routledge (2013a), part of the Taylor & Francis (T&F) Group (2013), seeking to identify confirming and disconfirming evidence for the potential analytical benefits of Ohmae's Five-Stage Globalization Theory (Ohmae, 1987, pp.35–9; BBC Executive Video Seminars 1993a, p.28).

Stage One – Export-Oriented Company

This study confirmed that Routledge's precursor companies fulfilled Ohmae's definition of Stage One. The precursor imprints of Routledge worked with an extensive series of distributors and agents round the world, and some had affiliated branches overseas (see also Kernan, 2013, p. 55):

In the 80s we regarded ourselves as publishing for the world. I think it's a British thing, to see ourselves as global – sending desk copies to West and East Africa, that kind of thing.

One of the interviewees saw this global reach as a structural feature of academic publishing in English:

You need for most of the publishing to get sales from around the world – even if one market was the dominant anchor for that particular book. It's not because of a fad or a phase, it's in the nature of the product.

The market share of different territories also remained remarkably consistent over the decades since the 1960s, with the major markets consisting of the US and UK, and smaller percentages round the world.

When I left Routledge [in the early 1990s], sales were a third in the UK, a third to the US and a third in the rest of world. Of the last third, perhaps 15/16% in Europe, the bulk of which was Scandinavia and Holland, for obvious reasons – and something like 8% in Japan, with huge basically hardback sales in Japanese libraries; 3/4% in Australia; and the rest dribbling through Hong Kong, Taiwan, South Korea – with a huge expansion, again, of funding for higher education libraries...

For library monograph publishing, the business depended crucially on sales to the US, with sales in other markets more dependent on the subject area. In the 1970s at Croom Helm, one of the precursor imprints to Routledge, for example:

On average we would get 60% of the total external investment from the American deal. So if we invested £3000 in the production of a new title I could get 60% back from the US edition, 10% would go to the author, and 40% would come from the UK and export market, of which Blackwell's might well order 150 copies on subscription.

A continuing and distinguishing feature of the academic publishing industry over most of the period since 1960 has been the nature and processes involved in the sales chain: the publisher's sales relationships were with agents, distributors and retailers, many of whom themselves had extensive international sales links (eg Blackwell's in Oxford). This example related to Routledge and Kegan Paul, one of the current Routledge's precursor companies (see Kernan, 2013, p.55), before it was purchased by Associated Book Publishers in 1985:

In India we had an agent. They held stock, and we had an exclusive arrangement with them. Trading can be a commercially advantageous arrangement.

The interviewees for this study confirmed the risks of doing business at a long distance in the days before reliable telephone and interactive communications. The basis of this trading was (and remains) both trust and willingness on the part of the publisher to take a risk by extending credit (eg up to 200 days for territories such as India) in order to sell their books. This quotation refers to Croom Helm sales in the 1970s:

We reckoned 80% of the books we produced went outside the UK, possibly 90%, including all the stuff that went through Blackwell's. So nominally our exports were 40% of sales, but if you look at the units not the money, it was up in the high 80%.

The interviews confirmed that British publishers were always more strongly export oriented than their American counterparts because of the scale of the US domestic market:

Especially in Higher Ed, they didn't have to pay attention [to global sales] because 90 to 95% of their business was in the US.

These interviews also included many echoes of the British Empire, confirming strong, continuing educational and cultural, and therefore also commercial, links with export markets. One of the interviewees began his publishing career in the 1960s at the British company Allen & Unwin. His acknowledgement of the Imperial legacy was unequivocal:

When I started I was not developing textbooks for the UK but for colonial schoolchildren, as were OUP and others. The Empire gave us the infrastructure to sell educational material into the export markets.

In other key territories, the British Empire established educational and legal systems which continued to sustain the demand for a range of educational and professional books from UK publishers into the period studied. One of the interviewees confirmed this for conditions in India in 2011:

One, we follow British English in the school curriculum. Two, the legal system as of now still follows what was framed/designed by the British when they were here. Even the postal department still follows the same rules and privileges. So it's quite imbued into the system.

Stage Two – Overseas Branches

The findings of this study confirmed that Routledge and its precursors operated with some overseas branches in addition to a series of agency arrangements long before the period studied, though the definitions and activities of those branches varied, and the fifty years from 1960 saw considerable growth and maturation in Routledge's sales offices, especially in New York, India and Singapore. Sales and marketing companies were common, such as the historical Routledge office in the US from 1834 to the early 1900s; Associated Book Publishers' Canadian and Australian subsidiaries from at least the 1960s; and the purchase in the 1990s from Ashgate Publishing of the Singapore distribution company, now T&F Asia Pacific, by T&F (Kernan, 2013). This study also confirmed the degree to which the industry's business structures relied, and continue to rely, on a series of relationships with agencies, distributors and licensees – and establishing these requires time and cultural sensitivity:

One of the things that you learn when you start working in international markets is that unlike the US and probably the UK it's a lot less cut and dried. It's a lot more about relationships, not only relationships with my international colleagues, but also relationships with book dealers and various vendors in the markets. That was a little bit of a learning curve, and nothing is as straightforward as in the US – you have to work through those things.

The changing activities of the New York office between 1978 and the late 1990s can also be said to confirm Ohmae's distinction between Stage 2 and Stage 3. When Methuen, Chapman & Hall Inc was established by Associated Book Publishers in the late 1970s, the goal of its academic and scientific publishing was to achieve higher sales and greater income for the UK academic company, encouraged at the time by UK governmental incentives to expand overseas. This goal was largely achieved over the following decade by mastering the 'mechanics of the market', as this former manager described – a theme which recurred in these interviewees with the Indian and Singaporean managers:

I know that we had quite strong growth from the very beginning. ... essentially by getting out to places we hadn't been before – the libraries, the trade, the adoption market, all aspects of the market. I don't think we ever saw growth less than 10% for quite a few years.

The same interviewee made it clear that the trade publishing executives of ABP in 1978 had a much more ambitious agenda for Methuen, Inc: that it should immediately become established as a trade

publisher in the US, and move straight to being a successful 'insider' publisher of mass-market titles. The failure of this venture also serves to illustrate the commercial risks involved in attempting to expand too quickly in a new location:

I remember my first day of arriving there, the head of the trade company was on the phone bidding for a project, something like half a million dollars – they had high ambitions and not a lot of real sense. They had to be wound down three or four years later – they'd lost a lot of money.

Stage Three - Relocating Production

This stage of Ohmae's model requires some definition with respect to the publishing industry, and serves to distinguish both the ways in which it differs from other industries and the impact of the extended nature of the publishing value chain (as defined, for example, in Thompson, 2010, p.21). The publishing industry's traditional definition of the activities of the production department includes responsibility for the processes involved in the physical manufacture of the products: costing, scheduling, liaising with printers and paper manufacturers, and managing logistics such as shipping and delivery (Bullock, 2012). The bulk of the work, after the preparation of the final copy was approved for typesetting, though managed in-house, was (and largely still is) completed by external contractors. Arguably, the traditional publishing industry does not itself manufacture anything: it purchases services from a range of suppliers. Over the period of this study, though the services purchased for the production of typesetting and printing were increasingly global, this was arguably more a reflection of multinational purchasing power and cost saving than globalization (Davies and Balkwill, 2011, p. 180). For example, one of Routledge's precursor imprints, Croom Helm (which published mainly short-run library hardbacks), in addition to introducing author-generated camera copy to remain profitable in the late 1980s, moved the 40% of its books that were typeset to a supplier in Singapore:

I remember particularly one Singaporean Chinese typesetter... [who] in 1983 used to produce a page for £1/£1.50. And bear in mind that we were paying £2.50 per page for typesetting in 1972, pre all the inflation in the 1970s – so in 1983 to produce the same in Britain would, I guess, have been £6 or £7.

More recently, in addition to the development of commissioning activities in key export markets, Routledge has also extended its global workforce by establishing a research team to support its Europa reference list (Routledge, 2013b) – a move which is arguably also consistent with the activities of a multinational rather than a truly global company:

Other teams are actually doing research on behalf of the UK, and the team works for Jeremy North's team that [produces] Europa. About 30 of them, they're researchers, basically. And they do research for the content for the *Europa Yearbook*, *Who's Who*, the *Education Yearbook*, and other activities for the UK.

If we also recognize the 'production' role of authors within the publishing value chain, to allow comparison with other industries, this study also confirmed that the commissioning reach of Routledge and its precursor companies to authors beyond the UK was constantly extended over the period studied, to the extent that in 2012 Routledge commissioned book authors from 62 different

countries (personal communication). The commissioning editors were also actively encouraged to recruit authors globally, as one of the 2013 interviews for this study confirmed:

When editors travel to international conferences we tell them they're expected to take some extra time and get on campus when they're there. And the other expression of our global view is we are expanding the editorial focus, so our editors are not just based in the US or the UK: we have more editors based in Singapore – and their remit is not to take US and UK product and adapt it, their remit is to find local authors, to build on that local connection....

To return to Ohmae's theme of 'Relocating production', this study also confirmed that as the local publishing branches established to sell product began to publish their own books (see under *Stage Four – Insiderization* below) they increasingly bought their own production services locally.

Stage Four – Insiderization

The findings of this study provided numerous confirmations of both the benefits for Routledge of building a thorough, 'insider's' understanding of local markets in order to mature as a global company, and of the tensions that arose and, to some extent, continue in encouraging different parts of the company to work together. In setting up its New York office in 1978, for example, the managers' first priority was to understand how to reach the all-important US market – which continues to be the predominant academic book market in the world. Growth became strongly established in the 1980s when an independent editorial programme was established in the Humanities and Social Sciences by the American Editorial Director, Bill Germano. To quote from one of his colleagues at the time:

I think you needed a real center of control editorially so people could make their own decisions and think about the audience and the market and go off in different directions if needs be, to exploit the opportunities here.

Similarly, the Routledge India local office was set up as a sales and marketing office for London and New York's publishing in order to take advantage of the intricacies of selling locally, including e product e product (for example, through through Infilbnet, India's Information and Library Network (Infilbnet 2013), which purchases ebooks and ejournals centrally for India's university libraries). The sales processes in each market vary, as this quotation from a Routledge India manager demonstrated:

If you're into reference and library publishing such as we do, primarily, then you go to the academic faculty who decide what they like and don't like, then you go to the department and get recommendations from the consultative faculty members. They then recommend the books to the library committee meeting, who meet regularly to decide what to buy and what not to buy, who then place the order with the vendor, and the vendor sources the book from us to supply to the library. That's how it works.

Routledge India launched its own publishing programme of Indian academic titles with four titles published in 2006. The list has grown to a 68-page catalogue for 2013, all of them also distributed through the company's international sales channels (Routledge India, no date and 2013). This

quotation from one of the global managers illustrates the strategic challenges involved in managing the balance between local and global with this Indian list:

As soon as you look at a market like India, you see very different levels of development in universities, big differences in price, and distribution is done in a very different way. If you're going to succeed in India, you're not going to do so at [global] prices. Now, it's harder to price locally because you don't want to damage your global market. Are you trying to sell in India? Yes. But also, are you trying to find local authors who will be read outside India? Also, yes. But if you make the local publishing too local, it may not fit the global market.

The interviews for this study also highlighted local managers' commitment to the need to respect the drivers of local publishing markets. This manager was responsible for sales across a broad territory, and voiced the potential for a lack of nuance, even colonialism, in making judgements about markets beyond the UK and US:

We look at each market individually to see at what stage they're at. We look at the relationships that we've got with the key players in the market, be they librarians or booksellers, or book dealers.... And there *are* differences. Being global is one thing, being joined up and reading from the same page is something completely different – so it's about recognising the diversity and enjoying the diversity, giving people voices, recognising that they're voices that speak in a different language or from a different perspective, without the baggage of being colonial masters that we unfortunately have.

This study suggested identified two common themes involved in the establishment of strong local offices: tensions inherent in different perspectives between locations; and the need for strong leadership to encourage the companies' employees to 'stay on the same page', as one manager put it:

Invariably if you have a unit in an international location, whether it's in the UK or the US or India, the people that are in that market, they're going to think local first.... One of the patterns I've seen is that the local offices would say, 'We really need to publish in this area because the opportunity is so great'. And then five years later we'd find that we had all this exposure and no sales – and invariably the issue was we were going after sweet spot markets where there was intense local competition, and we weren't really in a position to compete – and I think other publishers have experienced that as well.

Stage Five – The Global Company

The Ohmae model's definition of the requirement for a company to centralize its activities to operate as a truly global company at Stage Five can be said to apply to the recent reorganization of Routledge business processes (see also Kernan, 2013, pp. 63–9). From 2005, the editorial and marketing book teams in the UK and US were brought under a single management structure, organized with shared subject-specific teams with regular acquisition and management meetings run using video conferencing.

I wanted to ensure that everybody was following the basic premise that we were a higher education publisher, and doing textbooks which were appropriate to each of our respective markets, and library publishing which was appropriate to our global market. Our view is that

we are an academic publisher with some professional crossover in some subject areas, and with some opportunities for trade selling – but the focus is on the core academic market.

The production and sales functions were increasingly centralized and shared, allowing the introduction of common management information, content management, production and marketing database systems – demonstrating the integral role of information technology in the development of global business structures. Such developments are increasingly core to the success of an academic publishing business, as evidenced the effects of marketing databases which manage individual emails to academics; production systems which can generate files for Print on Demand production anywhere in the world; and the shift in the sales chains to ebook and ejournal sales platforms, which also facilitate the logistics of global sales (Kernan, 2013, pp. 68–9).

Another recent expression of the company's global strategy has been the hiring of local commissioning editors in key markets previously served only by sales and marketing, notably Singapore (where four editors were based in 2011, with another answering to Singapore but based in Beijing). They were integrated into the new reporting structures and joint meeting structures. During the period of this study, India remained editorially separate, in continued recognition of the unique challenges and opportunities of publishing for its market; but doubts were expressed by other managers of the long-term viability of its independent status.

India have their own editorial programme which is very specific to India. It's actually very similar to what they were doing in the US, this kind of desire to be a sort of semi-trade publisher as well, and to do books which are going to make a splash – and I just don't think it's the way forward, and it also makes it very difficult for us to sell their books anywhere else when they do that.

The changes highlighted differences in perspective which had surprised many of these interviewees, including this comment on the immediate benefits in constant US–UK communication:

I think one of the very interesting things which has come out of the UK–US [merger] is the realisation by the UK that we have had, actually, if I can put it that way, a rather colonial attitude, and there's been a sort of kind of tendency to say 'Well, *why* aren't they selling our books? Lovely book, *why* isn't it working? They're clearly not selling it right.' And as your colleagues, because they're not standing on the other side of an artificially erected fence, they're feeding back and saying, 'Well, if you really want to be successful in this market, this is what you need to do' – so you begin to understand much better the problems and issues which your counterparts in the other office face, both ways.... And that, actually, the number of books that you can really sell strongly in the other market is probably far fewer than you anticipated.

The management of this change included an increasing emphasis on the development of textbooks alongside the two other continuing strands of the company's publishing, reference/library and upper-level professional publishing, as a response to what one of the interviewees called 'the true globalization of higher education', ie the introduction of common curricula across the world with complete course textbooks following the US model. Aspects of this raised in these interviews included the introduction of consistent (and often shared) curricula across the world with complete course textbooks following the US model; the more common global practice of teaching in English; and an associated rise in the mobility of global employment for university lecturers.

I'm always amazed at how often people in the US and the UK in particular only think in terms of what's right in front of them. I realise it's a challenge to take a product view, but you really have to. One thing we have to always remind people of is that global means not just the US and UK, because that's where the bulk of our sales come from, but the rest of the world, particularly Asia.

What I saw when I first got here was various locations here there and everywhere doing their own thing. So whenever an editor brings a project to the [acquisition] meeting, they know that I will not let them not talk about the international opportunities.

The nature of flexible but clear and consistent leadership in making such changes was a common theme of the interviewees' comments about these changes in ways of working – and the need for change to be carefully managed and sensitively implemented ('we didn't just use same template for each function, and we also didn't do it all at the same time'). Senior managers were also themselves willing to engage with changes in local markets – some of which are also increasingly operating at a global scale, as this example showed, speaking about a visit to Hong Kong in 2009:

With the Managing Director of the books division, I went out to Asia for a couple of weeks and visited the major textbook market there – and that turned out to be a monumentally interesting trip because we learned that all of the universities in Hong Kong were going over to a US, four-year model, which means that they're going to the whole Gen Ed first two years model. And we also discovered that most of our library sales to Hong Kong were going through Baker & Taylor in the US, so we ended up adding a sales person because we had been underestimating our sales to Hong Kong by half – it was very important to us.

Discussion

The results of this study, though based on the analysis of a single case, suggest that Ohmae's Five Stages of Globalization theory offers explanatory value for scholars of the publishing industry to better understand academic publishing companies' global activities. The reaction of one of the senior managers to the model itself also suggests that it may act as a strategic decision-making tool:

I'm sure his [Ohmae's] model is right. I'm sure each company or each sector you looked at has minor variations, but as a broad theme it made a lot of sense to me. I think now it's an interesting question about whether you're actually going to get more progress, more acceleration, if almost from the start you do it globally.

This conclusion is subject to these caveats, however:

- Ohmae's writing prioritizes 'insiderization' as an essential element for understanding customers' needs for commercial success, and this study broadly confirmed the accuracy of his argument for the publishing company analyzed here, Routledge. However, the findings of this study also starkly highlighted, in a way that Ohmae does not flag, the degree to which the establishment of local teams with true insider expertise brings with it, almost inevitably, organizational tensions between offices in different parts of the world. This is an aspect of global companies which will repay further study, and is likely continue to be an issue for global academic publishing organizations.

- The distinctions noted above (see under *Stage Three: Relocating Production*) regarding the distributed, outsourced nature of 'production' within the publishing industry in comparison with other industries, and the language used to describe production, also point to the need for care in the definition of terms used when attempting to apply Ohmae's theory to the publishing industry. This paper has argued that the model also invites a reconsideration of the role of the author as a 'producer' in the publishing value chain, which could be said to be timely in light of the current climate of disintermediation, self-publishing and author choice.
- As a pragmatic study based upon a single case within one sector of the publishing industry, this study makes no claims to broader applicability across the industry or to other industries (Knight, 2002). The findings presented here would benefit from comparison with other organizational cases and from triangulation of its findings through other research methodologies.
- The scope and nature of this study, rooted in case study research rooted in historical methods, also defined and potentially limited the nature of its analysis. Many of the respondents, for example, volunteered and emphasized colonial themes in their view of the past and current function of the industry, which suggests that applying analytical processes drawn from the critical traditions of cultural studies (eg Tomlinson, 1991 and Hamm and Smandych, 2005) would also be fruitful for future research. The nature and function of global copyright were also inherent in the study, though mentioned by only one respondent (with reference to the impact on Routledge's business of China joining the World Trade Organization in 2001 and therefore signing up to global intellectual property conventions (see Kernan, 2013, p.68)). Further research into this aspect of academic publishers' practices with reference to critical research (eg Cvetkovski, 2013) could also yield productive insights.
- Ohmae's writing has consistently emphasized the commercial imperative of building a deep understanding of the customer. As this study has confirmed (see also Kernan, 2013, p. 67), the traditional 'customers' in academic publishing, the academics, have also functioned as the suppliers (as authors) as well as the key decision makers in purchasing decisions (both for textbook recommendations and for the library purchase of both books and journals). This study also confirmed that Routledge responded effectively during the period studied to the strategic opportunities of both digital printing and ebook and ejournal sales (see [22], pp. 64–5) in the face of the disruptions inherent in current digital innovations; and that, for the all-important authors, the Routledge brand as a mark of quality continued to hold weight ([22], p. 67).

In the digital era, this traditional 'customer' relationship between the academic and the academic publisher is, however, under threat. At the time of conducting this research, the potential for major disruption in the academic publishing marketplace was clear, as confirmed by two recent examples: the broadening of academics' publishing options represented by the Open Access movement for both journals and, potentially, library research monographs (see Kernan, 2013, p.67 for Routledge's strategic responses); and the global repricing of textbooks in August 2013 by major publishers including John Wiley, Cengage and Pearson to protect the US market from cheap imports (triggered by the *Kirtsaeng v. John Wiley & Sons* ruling in the US Supreme Court in March 2013 which held that textbooks produced outside the US could lawfully be imported and sold by a Thai student entrepreneur (Campbell, 2013)). Though these publishers also promised the swift provision of more 'local editions', the price rises seemed likely to further discourage the

student purchase of textbooks in markets outside the US, and to fuel their reliance on free online content (including open source textbooks), print and library content provided by the universities, or second-hand textbook purchase. The repricing, which carries clear strategic risks in markets outside the US, also serves to illustrate the challenges that academic publishers must address in order to survive in the global marketplace.

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