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Routledge as a Global Publisher: A case study, 1980–2010

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Abstract

A case study of the commercial history of the academic publishing company, Routledge, between 1980 and 2010, with a focus on its global activities and structures. During this period, Routledge experienced changes in ownership, branding and location as well as in its subject disciplines and publishing formats. The company was also an early and continuing innovator in digital publishing. The study presents findings drawn from interviews with past and current managers, and supporting content analysis of documents and web pages. It concludes by identifying the continuities that underlay the many changes in academic publishing over the period, and by suggesting possible future research, including to test the explanatory value of Ohmae's theories of globalization.

Keywords: Publishing, Academic Publishing, Routledge, Taylor & Francis, Informa, Globalization, Branding, Brand Extension, Business Case Study, Publishing Case Study, Conglomeration, Acquisition, Global Subsidiaries, Ebooks, Digital Publishing, Journals Publishing

Introduction

Aims

This paper aims to provide students and analysts of the publishing industry with a rich case study of the commercial history of an academic publisher, Routledge, since 1980, with a focus on its global activities and structures. I present findings drawn from the analysis of 15 interviews and the content analysis of documents and web pages relating to Routledge (2012), one of the largest global commercial publishers of books and journals in the academic disciplines of the humanities and social sciences, which forms a division of Taylor & Francis (2012a) within the Informa Group (2012). I conclude by suggesting how this case might be developed in further research and analysis to better understand the impact of globalization on academic publishing companies.

I hope that this detailed, company-specific case study will provide a resource for the study of globalization in academic publishing, and complement larger-scale studies of academic publishing (eg Thompson, 2005 and Page *et al.*, 2006); more general texts with substantial sections relating to academic publishing (including Davies and Balkwill, 2010 and Stevenson, 2010); and more personal accounts by practitioners (eg Boehmer, 2011). Further sources which relate directly to the companies analysed here include Pettigrew and Whipp (1991), which analyses some examples relating to ABP; and a 1934 company history of the original Routledge from 1834 to 1934 (Mumley, 1934).

Consistent with case-study methodology, the paper presents and analyses evidence collected during the course of the study itself. In a forthcoming paper (Kernan, forthcoming), I further analyse the findings of this study with reference to theoretical models and previous research relating to globalization, with a specific focus on Ohmae's globalization theory (Ohmae, 2005; BBC Executive Video Seminars, 1993).

The research process

The project drew upon 15 interviews carried out in 2011 with past and current managers from Routledge and its predecessor imprints; content analysis of historical and current documents including catalogues, company reports, internal memoranda, and current websites; and the researcher's own experience as a Director of Methuen & Co Ltd (one of the predecessor imprints when Routledge was formed in 1987), a Senior Commissioning Editor and Deputy Publisher at Routledge from 1987 to 1989, and a consultant staff member between 1991 and 2000.

The research reported here was a small-scale research project (Knight, 2002) carried out within a subtle realist framework, aiming to understand both the respondents' and researcher's interpretations of 'an external reality [that] is itself diverse and multifaceted' (Snape and Spencer, 2003, p.19).

Methodologically, the research was conducted to meet the requirements of successful 'research based upon in-depth, lightly structured interviews' (Knight, 2002, p.36) and case-study research as defined by Yin (2008), including a reliance 'on multiple sources of evidence, with data needing to converge in a triangulating fashion' (Yin, 2008, p.18). Consistent with Yin's approach (Yin, 2008, p.18), I also hoped to test these broad 'theoretical propositions':

- That the changes in academic publishing over the period were complex, structural and interlinked. At the same time, the roles of the internal and external communities involved showed considerable continuities.
- That Routledge's global activities during this period broadly confirm Ohmae's model (BBC Executive Video Seminars, 1993, pp. 21–2) of five 'stages' of globalization, which he defined as an analytical tool to inform organizational strategy: 1 'Export-Orientated Company'; 2 'Overseas Branches'; 3 'Relocating Production'; 4 'Insiderisation'; 5 'The Global Company'.

Rather than following a set of formal or sequential questions, the interviews addressed a checklist of topics, including the individual's own career background, and their experiences of organizational changes including branding, ownership, conglomeration, location, lists and markets, company composition, and management, as well as the role of relationships within and beyond the company.

The interviewees were based in London, the US, Singapore and India. Some were interviewed face-to-face and others by telephone, with interview lengths of between 30 and 90 minutes. As all were current or former senior executives and managers involved in decision-making at Routledge between the 1950s and 2011, they constituted an expert and convenience sample. Five were current employees of the company, with global and local responsibilities for the company's current publishing in the UK, the US, India and Asia Pacific. The majority of those interviewed had an editorial background, though others started their careers in sales, marketing, finance, production or distribution. All had spent their working lives within the industry, in careers spanning from 20 to 50 years. They consented to the recording of the interviews, which were transcribed and analysed thematically. Key findings and quotations were extracted with close reference to the audio recordings, in addition to sharing a draft of this paper with the respondents to assess the accuracy of the analysis. Consistent with ESRC ethical guidelines (Economic and Social Research Council, 2012) and the research consent process, the interviewees have not been named here, and every effort has been made to avoid identifying them by inference. Potential limitations to the data, analysis and reporting were also inherent in the project's reliance upon interviews and other data shared by current publishing practitioners (see *Evaluation* below).

The practices of interviewing and data analysis were informed by the approaches of Kvale (1996), Miles and Huberman (1994) and Van Manen (1990). Such research 'regard[s] the person of the interviewer as the primary methodological tool, with the relevant data created by the unique interaction between the

interviewer and interviewee' (Kvale, 1996, p.287). Phenomenological research approaches aim, as here, to '[produce] a theory of the unique' (Van Manen, 1990, p.156), and recognize the researcher's interpretations of findings.

The analyses of the interview data were triangulated through both content analysis of documents and the close involvement of the interviewees in the final stages of the analysis. The research design also aimed to address bias by acknowledging and exploring it during the interviews and data analysis as 'A recognized bias or subjective perspective' which might 'bring new dimensions forward, contributing to a multiperspectival construction of knowledge' (Kvale, 1996, p.286). Such an 'insider' study also risked professional bias across the research population, which I aimed to ameliorate by inviting critical comment from an uninvolved external reviewer.

Case-study findings

After a brief summary of *Background* findings relating to the context before the 1980s, in this section I present the findings of the Routledge case study by decade since 1980, followed by a final section which identifies themes that emerged from the study relating to current conditions and potential future developments. Each subsection includes a list of key dates in addition to the themes that arose from the interviews and documents. Direct quotations from the interviews are presented in italics.

Overview and definitions

Any detailed study of the publishing industry swiftly encounters the complexities of imprint names and changes of ownership. These were the Associated Book Publisher Ltd (ABP) imprints merged to form Routledge in 1988: Croom Helm, Methuen & Co Ltd, Routledge and Kegan Paul (RKP) and Tavistock Publications. The parent company of Routledge (2012) since 1998 has been Taylor & Francis (2012a). Taylor & Francis (referred to below as T&F) merged with the Informa Group (2012) in 2004.

Background

In the decades after the Second World War, UK publishing was affected by changes that led to increasing conglomeration and more corporate, disciplined management practices. Family-run businesses of long standing, often with substantial lists (eg Routledge & Kegan Paul was publishing 100 titles a year in 1960) began to gather in joint companies or be acquired through purchase. Methuen & Co Ltd (another of the current Routledge's precursor imprints), for example, joined the UK publishing group Associated Book Publishers (ABP) in 1958. These larger companies, including ABP, were often themselves majority owned by family trusts – in its case, the Crosthwaite-Eyre family.

The sales reach and therefore outlook of such UK academic publishing companies always assumed an overseas market to a much greater extent than their American counterparts:

'Even now, US publishers expect to export 10–20% and British publishers expect to export 70–80% – because of the relative size of the US market.'

ABP sold outside the UK through local agents, and through sales visits to key accounts in particular markets. For example, in addition to naming UK-based sales agencies for other territories, the 1967 ABP new title catalogue (Associated Book Publishers, 1967) listed representative agents or distributors in a wide range of countries including South Africa, Rhodesia, Argentina, Mexico, the USA, Jamaica, Ceylon, India, Japan, Pakistan, Hong Kong, Australia and Europe, as well as its own subsidiary company in Canada. Unusually in comparison with other industries, publishers allowed overseas retailers and wholesalers to buy on long terms, such as paying after 60 days, or up to 180 days for edition sales to India or the USA:

'You're making the assumption that that they will want more later, come back for more. You get ripped off occasionally, but 99% of the time you get paid.'

The RKP list, for example, found strong support in key overseas markets:

'In Beirut people loved Popper and Fromm – The Open Society, Fear and Freedom. If they had a good English education they wanted these books – found this from Beirut to Bogata, we always came back with a lot of good orders through building relationships with the buyers.'

Many UK major bookshop accounts (eg Blackwell's in Oxford) also supplied both institutional and private customers all over the world. A manager from another of Routledge's precursor imprints, Croom Helm, estimated that in the 1970s 80–90% of their sales were to eventual customers outside of the UK.

Many UK academic publishers also operated long-established sales – and in some cases publishing – offices outside of the UK. Some of this expansion was historically linked to the British Empire, with Oxford University Press (2012) as one the most extensive examples. Among Routledge's precursors, RKP set up an office in Boston in 1974, having opened a US office first in the 1860s which closed in 1902; and ABP, which already owned the Law Book Company in Australia and a company in Canada (operating as both Methuen Publications and the Carswell Company for the Law list), launched Methuen, Inc in NY in 1978, initially as both a trade and an academic publisher with an associated scientific company.

The US had long been the most important market for UK academic publishers, reached mainly through co-edition deals (as continues to be the case for trade academic titles) and distribution arrangements. ABP's academic division, for example, had a long-standing distribution agreement with Barnes & Noble in NY. The impetus for ABP to set up an office of its own in NY in the 1970s was shared with other UK academic publishers, including Edward Arnold, Allen & Unwin and Blackwell.

'We started to ask ourselves, "Why are we selling rights in books that are being re-printed many times?" OUP always had an American office; CUP always had an American office. For Methuen, there was a growing awareness that the US market was even stronger than we understood.'

The technological changes in book production since the 1970s have been both revolutionary and global. During the 1970s, high levels of inflation in the UK (up to 27% in a single year) and the improvements in telephone and air communication encouraged publishers to source their production services from global suppliers. For example, Croom Helm began to typeset in Singapore in the late 1970s, as did many other academic publishers.

The 1970s also saw consistent growth in the higher education and library markets in the UK – the beginning of a 'golden era' for academic book publishing which lasted until the 1990s when university library budgets became increasingly dominated by journal purchasing.

'The Robbins Report [HMSO, 1963] made the university system go crazy, and the market go crazy. With the new universities, and the polytechnics, there was tremendous growth in student numbers 1968 to 1973.'

1980–1990

1985	RKP was sold to ABP, and joined the Academic Division
1986	A NY-based Editorial Director for academic commissioning was hired at Methuen, Inc
1986	Croom Helm was acquired by ABP; its academic turnover was £3 million
June 1987	Acquisition of ABP by the International Thomson Organisation; Methuen, Inc was retained in NY, and renamed Routledge, Chapman & Hall, Inc
March 1988	The academic publishing of the former ABP was formally launched under the single imprint name Routledge, combining four former publishing imprints: Methuen & Co, Routledge & Kegan Paul, Tavistock Publications and Croom Helm
1989	Routledge produced over 620 books, and c50% of its sales were overseas

The 'New' Routledge

Routledge as a consolidated publishing house with a new brand image was launched in 1988 with book lists in the social sciences and humanities plus 16 academic journals. Its books represented the full range of academic formats then common: library research monographs, library hardbacks, student and high-level paperbacks, academic trade hardbacks and paperbacks, textbooks as then defined in the UK (mainly black and white, Royal 8vo format texts), and a scholarly reference list including both commissioned library reference works and some dictionaries. The Routledge book sales were almost entirely achieved through traditional publishing 'business-to-business' sales chains, including retail and wholesale links worldwide. When formally launched in 1988, its five 'publishing groups' were: Humanities; Social and Behavioural Sciences; Business, Economics, Education, Geography and International Affairs; Reference and Linguistics; and Mind, Body, Spirit/Arkana (Routledge, 1987). Its first New Book catalogue, for March–August 1988 (Routledge, 1988), included 380 new titles over six months.

Importance of global sales

The importance of global sales in academic publishing was a continuing theme throughout this decade, as shown by this quote from the 1984 Annual Report to the ABP Board for the Academic Division, written by John Naylor, then Managing Director, Academic Division:

'Exports are the be-all and end-all of the Academic Division's business. They take 42% of output by value, more than half by volume, and should take more still. The business is unimaginable without its export activities, and its ability to achieve healthy profits depends entirely upon its performance overseas.' (Associated Book Publishers, 1984, p.7)

Increase in US commissioning from UK

As stated above, the US had long been the most important export market for UK academic titles. This fact was reflected more actively at ABP during this period: editors from the UK travelled in the US to commission titles, and one of the editorial directors spent two years working from Methuen, Inc.

'We were trying to move away from buying and selling rights to having our own books that we owned completely.'

'I went to explain to the Americans about our books – and started reading the British books as an American would. From NY, my job was then to sometimes lower the expectation of the British editors while raising the expectations of the American employees.'

Introduction of local commissioning in US

In 1986, after Bill Germano was recruited as Editorial Director, Methuen, Inc began to develop a strongly branded and high profile 'trade academic' list which met the expectations of the US market in terms of presentation, promotion and price, and first introduced many critical scholars to the US academy.

'We rode that whole post-modern wave, so between that and the feminist philosophy and Bill [Germano]'s list, which was largely literary studies, we cornered that market.'

Important differences of perspective between NY and London were, however, both very real and increasingly apparent through the decade. The US market was (and is) the largest academic market in the world. In the face of strong competition from the US university presses, does a UK academic publisher choose to produce key titles in the right format and price to be marketed strongly in the US, including through the book trade there, or do they instead spread their efforts across the list? The risks in the latter were apparent to one of the NY managers during this period:

'The potential for homogenization brings with it the problem of a vanillaization of everything.'

In contrast, the then MD in London, John Naylor (Associated Book Publishers, 1984) called for more promotion of the list in general as the best strategy to build brand awareness and therefore sales– not least to continue to attract and keep major, global authors:

‘The division’s most immediate anxiety over Methuen, Inc is for our authors’ goodwill. The worst possible case is that authors refuse to sign with us here for fear of being published by us there.’
(Associated Book Publishers, 1984, p.9)

An era of mergers, take-overs and conglomerations

The take-over of ABP by Thomson in 1987 was just one expression of the increasingly global publishing marketplace in the 1980s, and the predominant role played by media conglomerations such as International Thomson. Their primary interest in ABP was in high-profit sectors of publishing, especially legal publishing, as was apparent when they swiftly sold the trade divisions (including the general and children’s divisions), along with the imprint name ‘Methuen’.

‘By the time Thomson bought ABP everybody wanted to be global – everybody wanted to own copyrights all over the world.’

Branding

Though borne of necessity with the sale of the Methuen name, the recombination of the academic publishing imprints under the brand name Routledge allowed the definition of a shared company image and consistent company goals across the different publishing activities:

‘The Routledge brand ended up as a much more powerful brand than any of the component parts that went into it.’

In a letter posted to the all-important authors in November 1987, the change of branding was presented in these terms:

‘Routledge is the oldest established name and publishes in all the fields in which the other companies are active. It has an international reputation for excellence. The amalgamation of the four imprints [Methuen & Co Ltd, Routledge & Kegan Paul, Tavistock Publications and Croom Helm], combining the distinctive qualities of each, will enhance that reputation.’ (Routledge, 1987)

Changes in the academic marketplace

This period also saw greater specialization of formats within subject areas as books became more competitive with journals in the academic marketplace. In 1985, John Naylor circulated these overview sales data (Naylor, 1987), with figures in brackets to adjust for inflation. They show both falling expenditure in real terms the UK across the sector with the end of the post-Robbins university expansion, and the growing proportion of journal expenditure:

	<i>1978/79</i>	<i>1982/83</i>	<i>1983/84</i>	<i>1984/85</i>
Total Book & Periodical Expenditure (£000s)	17,184	24,227 (–16.2)	27,120 (–20.1)	29,675 (–25.6)
Books as % of Total	53.5%	47.5%	46.2%	44.5%
Periodicals as % of Total	46.5%	52.5%	53.8%	55.5%

Source: Direct quotation from Naylor, J. (1987) *University Library Expenditure Digest*, citing University and College Publishers Report 17, Publishers Association.

1990–2000

1991	Thomson acquired the academic list of Unwin Hyman, merged with Routledge
June 1992	Thomson restructured Routledge, Chapman & Hall, Inc to create Routledge, Inc and Chapman and Hall, Inc, separating the Academic and Scientific companies in the US

1996	A management buyout from International Thomson, financed by the private equity firm Cinven, resulted in Routledge operating independently
1996	The Indian branch of Routledge was opened, selling books over time also to Nepal, Bangladesh, Sri Lanka and Pakistan
1997	Cinven acquired Carfax, an academic journals publisher based in Oxford, and Spon, a former ABP imprint with lists in the Built Environment
May 1998	T&F was listed on the London Stock Exchange
June 1998	Routledge sales were reported to be £47m (including the sales of Carfax and Spon) with profits of £4.8m
November 1998	T&F acquired Routledge, Carfax and Spon from Cinven
1998	Gower's Singapore distribution company (with 9 staff) purchased by T&F
1999	T&F acquired Europa Publications Ltd

Specialization of book publishing formats

Across the subject areas it served, the creation of the new Routledge encouraged the commissioning teams to develop books that would more directly serve the needs of specific readers and markets. There was increasing recognition, for example, that there was a great deal more involved in commissioning and publishing a tertiary textbook than encouraging academics to write up their own course notes. Barney Allan, a senior member of the International Sales team (whose territories included the Asia Pacific regions) urged the Publishers to encourage the view that a new book would 'not' be a textbook when: 'the author says it is', 'we say it is', 'it is unaffordable for students', 'there are no courses applicable to it', 'it is a "recommended" book', 'it is entirely UK specific' or 'it is not "targeted" at competing titles' (Routledge, 1992a, p.1). From the end of the 1990s a small editorial team worked with the commissioning editors to develop new and backlist titles for an increasingly competitive UK and global textbook market.

In addition to textbooks, library monographs and supplementary texts for individual purchase by experts and scholars, the commissioning editor for each subject area was also encouraged to develop large-scale, highly priced hardback compilations aimed at global libraries, especially in the Asian Pacific territories, to reflect current scholarship in their subjects.

'The multi-volumes were done specifically for the Japanese market – and they still [in 2011] sell 30 or 40 per title at £150 per volume in Japan – for example, for compilations of the latest Shakespeare scholarship.'

Changes in ownership

The levels of profit which could be made by Routledge during this time were inadequate to satisfy either an international corporation such as International Thomson or a venture capitalist company such as Cinven. The decade nonetheless saw considerable growth at Routledge through both acquisition and brand building, and both Thomson and Cinven sold the company on at a profit (Cope, 1998; Cinven, no date). The interviewees also voiced the positive and negative effects that can follow a change of management or ownership:

'I worked very happily for Thomson [in the US] for years. Then we were transferred into the textbook division of Thomson run out of Stamford, Connecticut. We were put in a division where everyone was making double the profits –and they hated all the feminist and gay stuff.'

'The acquisition of Routledge by Taylor & Francis was the best thing that ever happened to the business – to find an owner that was really into academic publishing.'

Increasing importance of journal publishing

This decade saw a continuation of the movement of university library spending in the US and UK towards journal rather than book purchasing. As a response to this shift, during this decade the

Routledge commissioning editors were increasingly encouraged to work with a growing journals team to sign up new society and scholarly journals for the company. A 1992 standard letter prepared for circulation to prospective journal editors and societies (Routledge, 1992c) outlined the ownership and sales strengths of the company and the journals it then published, including *The British Journal of Sociology*, *Social History*, *The Curriculum Journal* and *Educational Research*.

Constant management tensions between London and NY

The interviews and documents analysed for this study confirm the continuing difficulties at this time experienced on both sides of the Atlantic between Routledge in London and NY. Among the factors at play were divergent assumptions about the role of the NY office, impediments to communication in the days before email and interactive technologies, and the financial burden of the stockholding imposed on Routledge, Inc by the London office:

'I don't think there was ever a point where there wasn't a possibility for tension and friction between London and NY. The US publishing was always seen as being a little too edgy to sell in the UK, and Routledge, Inc for a long while simply did not get that they were now academic publishers not trade book publishers. But the reason they were not making a profit was mainly because UK-produced books were languishing in the warehouse.'

The US company's local publishing at this time had a reputation for edgy, critical books, especially in cultural and literary studies – on topics which were themselves at odds with corporate, commercial pressures, as shown in a 1995 *Lingua Franca* article:

'Has cultural studies, one wonders, become Lord Thomson's new cash cow? It's the kind of thought a Routledge author might entertain.' (Boynton, 1995)

The lack of common IT systems at a time of growing dependence on accurate management information was a contributing factor to the difficulties experienced between London and NY. The UK's IT director worked in the NY office for the year 1995–6 to introduce a shared system:

'Towards the end of time with Thomson they started suddenly to realize that everyone needed computerized systems.... London were finally allowed to put our little, home-made system into NY, which allowed the editors to input title information once and so on – and to share it.'

Growth of Asian and SE Asian markets

During this decade, the owners of Routledge made two major investment decisions, one in India and the other in Singapore, which show how the global academic publishing marketplace was changing:

- **Indian office:** Since at least the 1960s, ABP and Routledge were represented in India by B.I. Publications, which had offices in the major Indian cities. Following 1991 Indian legislation which for the first time allowed foreign-owned companies to set up in India, an Indian company was set up in 1996, with an Area Manager based in Madras and a Showroom in Delhi.
- **Singapore distribution and sales centre:** Gower's Singapore distribution company was purchased by T&F in 1998 to form T&F Singapore, with nine staff. The company's current name, T&F Asia Pacific, was adopted in 2001.

E-products, workflow and sales

This decade also saw the first investments in e-products, including the *Arden Shakespeare CD-Rom* (developed at Routledge though published by Thomas Nelson in 1997 after Thomson transferred the Arden series to another of their companies with the sale of Routledge to Cinven in 1996 (see Siemens, 1988)) and the *Dictionary of Philosophy CD-Rom* (published in 1998, and still listed on Amazon at the end of 2012 with an RRP of \$4,995 for a ten-user site agreement (Amazon, 2012)). Routledge had limited commercial success with such CD-Roms, both because the costs of development and therefore

prices were so high and because university licensing models for such interactive content products were unfamiliar at this time, especially in the Humanities. However, in 2012 both sets of content were available as part of online databases (the *Dictionary of Philosophy* still with T&F, and the Arden as part of Bloomsbury Academic's Drama Online).

Routledge also began to introduce digital workflow systems from the late 1990s. In a memorandum circulated to the Routledge commissioning editors in 1992, the IT Director, Tony Short, predicted many of the subsequent developments in digital printing and e-delivery of content – at a time when the file storage, network and IT requirements to support these developments were unknown. Under a heading 'Progress towards electronic printing for academic books', he foresaw the potential for 'ultra-short' print runs for library books and reprints, and for what have more recently become established as the print-on-demand and 'distribute and print' models of production (Routledge, 1992b). At the time this 1992 memo was written, however, the Routledge *French Technical Dictionary* was in production – and it offers an example of both the cost and the physical limitations of managing data in digital form for a large-scale project in 1992:

'I remember having to wait three months for America to deliver a 1GB disc which cost us £1000. The kind of controlling and moving of information that we have now – 450GB discs, that kind of thing – simply wasn't possible then, because you could never have afforded the storage.'

The end of this decade saw the beginnings of the move to e-sales, especially for journals publishing, and universities negotiating together to buy library content, either through governments or as consortia. The MD of Routledge under Cinven, Bob Kiernan, also saw the broad-ranging implications of the shift to digital journals at this time (Kiernan, 1998):

'I am sure that, within five years, the journal itself will be on the way to being a centrepiece of an extended range of electronic services for the community to which it is addressed... [including] electronic conferencing, the assembly of – or access to – supplementary articles or data, and pre-print server facilities.' (Kiernan, 1998, p.100)

2000–2010

2000	T&F acquired the Scandinavian University Press journals list (Munroe, 2007)
2001	T&F partnered with Ebrary, Inc. to sell ebooks (Munroe, 2007)
2001	T&F acquired Gordon and Breach Publishing Group (including Harwood Academic) and Curzon Press (Munroe, 2007)
2002	T&F acquired Fitzroy Deanborn Publishers (FDP) for £ 3.1 million (Munroe, 2007)
2003	T&F acquired Bios Scientific Publishers, CRC Press, Marcel Decker, Inc., Frank Cass & Co. Ltd., Swets & Zeitlinger Publishers and A.A. Balkema (Munroe, 2007)
2004	Informa and T&F agreed 'an independent merger' (Informa, 2012) to create of company with a value of over \$2 billion (Munroe, 2007)
2005	The editorial and marketing functions of Routledge, Inc in NY were brought under management from the UK. Sales in the US had already been brought into a single team based at the T&F offices in Boca Raton, Florida.
2005	Further T&F acquisitions included the Institute of Physics' book publishing (Munroe, 2007)
2006	Cavendish, an independent law publisher, acquired by T&F (Quayle Munro, 2006)
2006	Routledge India Originals first published (200 titles by 2011)
2007	Lawrence Erlbaum Associates was acquired, with 100 journals, a frontlist of 200 books and an extensive backlist, along with the Analytic Press imprint (Munroe, 2007)

Though not a complete list of acquisitions and digital initiatives during this time, the dates above indicate the pace and scale of change in the company's publishing during this decade, across a broadening range of disciplines and with an increasing emphasis on journals publishing.

Digital innovations and impacts

The company invested heavily during this period in developing both production workflow and e-sales structures to take advantage of the move into digital publishing. In 2001 the company initiated the lengthy process of digitizing its backlist and developing its own online platforms (Value Chain International, 2011). A digital production workflow was also introduced in the early 2000s, enabled by software developed in-house (including KUDU and the Routledge Automated Pagination System, RAPS) as well as proprietary systems such as GT (developed by Klopotek) and a content repository system (McLean, 2006). The major benefits of working with XML in such workflow systems included using tags to protect the formatting and flow of the text in different formats, working within consistent layout templates, and allowing links with other texts. With later extensions also to allow file outputs in EPUB and the other file formats required by different ebook retailers, such innovations enabled the range of subsequent e-products, including both stand-alone online and download products and databases; and for print, too, offered increases in quality and reductions in production times and costs. Traditional print processes were made quicker and cheaper (eg reprints and short-run hardbacks). The new digital workflows also supporting the innovations of print on demand and 'distribute and print' (McLean, 2006) which have revolutionized stock control and inventory management across the industry since 2005.

There was nonetheless a continuing recognition that the pace of change must protect the business by sustaining profit margins – which in 2010 and beyond still demanded the maintenance of print sales:

'What we're trying to do is develop something which keeps us open to changes in the market, which means we have digital content, but run the book in parallel.'

Throughout the decade Routledge developed sales links worldwide with the e-library content aggregators to sell ebooks (including DawsonEra, MyLibrary, Ebrary and EBL). Sales to individual purchasers through the ebook retailers accounted for about 20% of their ebook sales overall in 2011 (of which sales through Amazon represented 83%) (Chesher, 2012).

Strategic emphasis on subscription business

In the Informa Group Annual Report relating to 2010 (Informa, 2011, p.9), Routledge was described as part of the Academic Information division. The Report emphasized current strategic investments in platform-delivered publishing to allow 78% of sales for the books and journals combined to be sold on subscription in 2010 (Informa, 2011, p.9), i.e. directly to purchasers (in this case, librarians) rather than through a retail supply chain. This change was having a major impact on nature of sales teams, both in the UK and in other key markets:

'Taylor & Francis is one of the major ebook publishers – we are a first mover, we've got more ebooks I think than pretty much anyone else... certainly in social sciences we're the biggest. If our sales people are not involved, and have not begun to internalize that fact, then the clock is ticking on their careers. But it is a very difficult transition for a lot of people.'

Development of global business structures

Creation of global commissioning and marketing teams

In 2005, the senior management of Routledge made the major structural decision to create shared subject teams for both commissioning and marketing, initially collaborating between NY and the UK by making use of interactive technologies. This change involved the loss of senior roles in NY, and the designation of two senior UK managers as Publishers for Humanities and Social Sciences with line management responsibility for staff in NY as well as the UK. The aim of the innovation was to align the company's many activities by subject area, to break down the 'them and us' problems that constantly occurred across the Atlantic, and to both improve profitability and put more investment into 'forward-facing jobs' such as commissioning and marketing:

'It was a defining moment.... On a good day the companies were sisters; but on a bad day they were distant cousins with a barbed wire fence down the middle.'

Over time, this shift also encompassed changes in the management of the company's production functions to develop a shared editorial production workflow system which is globally accessible:

'I can go and talk to the production director and ask how many books we have in production – we really couldn't do that before. We've also centralized the management of the inventory, which is a huge issue for publishers.'

An expanded central textbook development team was also established, with members in the US and UK offices:

'In that area we think that method is really important, and that if we establish some principles about how to do chapter summaries or other pedagogical features, we can apply them more generally.'

T&F in Singapore, Beijing and India

By the end of the decade, T&F had also made a strong commitment to developing its global publishing operations in Asia and India, with rapidly growing offices in Singapore and New Delhi, and the hiring of a commissioning editor in Beijing. Many of the staff in both India and Asia Pacific worked in sales teams, with separate print and e teams in India and shared sales responsibilities for both product types in the Asia Pacific region. The Singapore office also ran a book distribution service for other publishers (see T&F Asia Pacific, 2006), and was due also to expand into print-on-demand services in 2012.

The commissioning editors in Singapore and Beijing were line managed by the heads of the same discipline-centred, global teams as the UK and NY editors. The global subject team heads, for example, joined the interview panels for the recruitment of these local commissioning editors.

'... my thinking is that the editors we have, by reporting obviously to people in Boca Raton [Florida, USA], which is the CRC Press Head Office, or in Milton Park [Oxfordshire, UK], they are acting in a very global way rather than doing something for the [local] markets.'

Both the Asian and the SE Asian offices had grown dramatically since being acquired by T&F. Thirty-five people were employed at the Singapore office in 2011, and nearly 30 in other parts of Asia Pacific – up from nine when T&F bought the company in 1998.

In India, the companies' staff had seen similarly dramatic growth: from a team of 26 editorial and sales staff in 2008, in 2011 they employed 96 people across the country. Though they worked closely with some of the commissioning teams, especially in South Asian Studies, the New Delhi office's commissioning editors continued to work outside this rest of the company's newly centralized structure.

'We work within the broad policy framework of the Routledge UK team. We exchange information, and we work as a book team...'

This decade saw considerable growth in the Indian company's local publishing with the launch of Routledge India Originals (Routledge India, no date), a series which reflected the Indian market's expectations in terms of packaging and price as well as topics.

A global manager interviewed for this study emphasized that the Routledge commissioning editors also travelled to other key markets, including Australia and Canada, to ensure that the global reach of their commissioning spread beyond the four geographical centres of UK, USA, SE Asia and Asia:

'Australia is extremely strong for us. We have no editors there, though we encourage long commissioning trips; and use Palgrave to be our warehouse and distributor.'

Despite these and other 'global' developments up to 2010, however, the Anglo-American weighting of the company's commissioning was seen by another current managers as almost certain to continue:

'At its core, I think Routledge will always be Anglo-American'.

2011 and beyond

This final section of findings lists themes relating to the publishing of Routledge that this project indicated are likely to continue through the decade 2010–2020.

1. Branding in the context of growth through acquisition

Brand image was a constant theme in the interviews for this study: of the precursor imprints within ABP, of Routledge within T&F, of the many companies acquired by the company over the period studied, and even of the balance between T&F and its parent, the Informa Group. The Routledge brand continued to be valued, and looked likely to be applied to a continuing list of academic and professional publishing companies and lists acquired by T&F (eg Munroe, 2007).

The scale of the publishing in early 2013 showed the extent of brand enlargement since 1988. The New Book catalogue listed 1,794 titles to be published in the three months January to March 2013 (T&F, 2012d), of which 1,258 were branded Routledge (alongside Garland Science and CRC Press titles). Many of the subjects listed in the first, 1988 Routledge catalogue (see above, under *The 'New' Routledge*) were strongly represented, plus an additional range of disciplines reflecting the many changes in the company described here, including Nursing and Applied Health, Medicine, Life Sciences, Science and Technology, Law, and Architecture and Built Environment, plus a more nuanced list of subdisciplines within the Humanities, Education, Social Sciences and the Behavioural Sciences. The branding of the journals was decided at T&F Group level, consistent with the perceived subject strengths of the Routledge and T&F brands.

As outlined in this study, this dramatic growth was fuelled by a growth in journals publishing as well as a series of company and list acquisitions (most recently, both in 2012, Focal Press, acquired from Elsevier, and the Hodder Higher Education List). The rebranding of the lists of each newly acquired company and list involved difficult – and often painful – decisions. With reference to the 2011 acquisition and branding of Earthscan (Williams, 2011) and the drivers of such acquisitions, one senior manager said:

'Does the brand look back and reflect history/where we came from, or is the brand and the imprint trying to do something going forward?... Ultimately we see how strong the name is in the sales market – and some of the most vociferous defenders of a brand are the authors.'

'Purchasing Earthscan enabled us to jump ahead 6 to 7 years to build a scholarly publishing list.... Earthscan themselves recognized that they had reached the limits of their growth as an independent company, and wanted a good home to take the company to the next stage.'

The Informa Group, as parent, was an increasingly diversified company, as shown for example in its 2005 acquisition of IIR Holdings, a major 'event' business (Informa, 2012). In the publishing marketplace, however, Informa functioned as an invisible parent company. As shown in the 2011 T&F rebranding of the company's online platform 'informaworld' (T&F, 2011), T&F looked set to grow in importance, especially in the company's global publishing, under its current headline 'Taylor & Francis: Local Partnership, Global Network' (Informa, 2012).

2. Product mix and service offering to authors

This study found considerable consistency since 1980 in the types of products offered under the Routledge brand, and continuing recognition of the crucial importance of sustaining a reciprocal relationship with the authors:

'One of the things that makes academic publishing special is that the key supplier (the author) is still the person who makes the key purchasing decision (through recommendations to the library or the students).'

'Even if the whole business goes electronic, I could still be sitting here saying, "What do we do? Well, we do high-level research for libraries, we do materials that students use, we do scholarly books of scholarly material which work at the fusion of different subjects and formulate new ideas that will shape the disciplines of the future".'

The commercial logic for sustaining a mixture of print and e publishing was also confirmed in an annual 2012 Investors' presentation by the Group Sales Director and President, T&F Asia, Christoph Chesher (Chesher, 2012). He stated that Routledge's ebook sales in the previous year were about £19m, which represented about 12% of the combined Routledge print books and ebooks income (ie excluding sales of Routledge journals), with compound growth over the previous five years of about 22% per annum. Addressing the question, 'Why not a faster transition or switch to ebooks?', he concluded:

'We are careful not to switch to electronic at the expense of print. It's fine switching from print, but not at the expense of margin or net revenue.' (Chesher, 2012)

3. Recognition of the role of both local and global needs:

The 2011–12 Taylor & Francis *Online Resources* leaflet (T&F, 2011), which promoted its latest innovations in platform publishing, confirmed that, in sales terms at least, the four global centres of the digital business were the UK (Milton Park, Oxon), the US (the NY sales office), India (New Delhi) and Asia Pacific (Singapore). This study's outcomes show a continuing awareness across the business of the importance of understanding the needs of each local market, despite tensions and differences of perspective:

'I've realized that we've had a kind of colonial attitude from the UK: we have been saying "Why haven't you been selling more books?" when the number of books that you can really source to another market is very much lower than you would have thought.'

Especially in Asia, the continuing potential for academic publishing looks certain to encourage continuing globalization in both content and organizational structures.

'What turned things around was when the Chinese joined WTO in 2001, and had therefore to begin to respect IP [intellectual property]... Sales in China have for books gone from a couple of percent to 15–20% for Asia Pacific; journals are over 30% from around 5–10% in the early 90s.'

4. Digital innovation and digital information

This study has emphasized the constant and continuing importance of technical innovation since 1980, and the company's shift from retail to end-user sales. As a current example of innovation, from 2013 700 of the 1600 journals will offer open access option where authors opt to pay an Article Publishing Charge (T&F, 2012b). Continuing to develop the subscription business for journals and books via the company's new proprietary e-platform, Open Select (Chesher, 2012), will also be a continuing strategic priority, building for example on the top rating of the company's social science journals in the 2011 citation index (T&F, 2012c). Innovations in production and printing will also be a continuing strategic theme: though already well established in the UK and US, the transition to print on demand was a top management priority for one local manager interviewed for this study in 2011. The company's investment since 2001 in digitizing its book backlists offered the flexibility to print locally as well as to keep in print all of the titles that were currently available in digital formats – which in May 2012 numbered 38,000 Routledge book titles, a total that was expected to reach 45,000 by the end of December 2012 (Chesher, 2012).

Evaluation of the methodology

The methodology encountered some logistical problems (including recording difficulties which resulted in poor-quality audio for some of the telephone calls), and the free-flowing interviews also encouraged

discussion of some irrelevant details. Establishing rapport, however, which is a key requirement for success in such interviews (Knight, 2002, p.34), proved possible to achieve even in the telephone calls, partly through my own insider knowledge and experience, and also because colleagues were encouraged to contribute by a current senior T&F manager. The free-flowing interview format also allowed themes to emerge as more important than I originally envisaged, including technological, managerial and legal factors. A range of historical documents, both made available by the respondents and in my own library, also contributed more richly to the findings than originally envisaged, as did the large number of resources available online.

As noted above under *Methodology*, the risk of personal bias was addressed during the interviews themselves through active discussion, and by addressing the many comments from the interviewees on drafts of this paper. Their continuing involvement in the analysis added greatly to findings, and confirmed the benefits of ‘intersubjective interaction’ which can offer ‘perspectival subjectivity’ (Kvale, 1996, pp.66 and 212).

My commitment to avoiding identification and minimizing the risk of professional impacts on the many participants in the research led to some information and quotations being omitted from this report. Though a limitation on some of the detail of the findings, all of the themes confirmed by the data were addressed. An unforeseen consequence of the research process was the emotional impact of some of the interviews (see Van Manen, 1990, pp.162–3), which led to one interviewee withdrawing from the study.

Within the scope of a small-scale study, the findings overall yielded a range of insights which confirmed the benefits of a case-study approach based on qualitative research processes. As one former colleague commented, ‘*You have captured the essence of the Routledge experience as I remember it*’.

Conclusions

This study sought to better understand the processes and drivers of the changes in the academic publishing house Routledge between 1980 and 2010. A larger-scale study involving more participants (especially involved in the middle of the organization rather than at senior levels), with associated consultation of a wider range of documents and further triangulation (eg the collection and analysis of observational data), would serve to deepen and test the conclusions here. Comparing competitor companies’ experience over the same span of time would also be fruitful, especially that of a global American academic publisher; as would studies to identify how the same changes in conglomeration, technology and globalization over this period have affected closely associated publishing sectors (eg educational publishing).

To return to my initial propositions:

- This case study has confirmed that the period 1980–2010 was one of dramatic change in academic publishing, with major shifts in the marketplace, in the technologies that enabled both the working practices and the production and nature of the products, and in the commercial context. The study also identified continuities in Routledge’s commitment to working in partnership with authors and in their reliance on supply chains of suppliers and distributors; and confirmed the complexities of branding in global publishing.
- As will be explored further in an associated article (Kernan, forthcoming), the organizational changes at Routledge 1980–2010 also broadly confirm the explanatory benefits of Ohmae’s ‘Stages of Globalization’ theory (BBC Executive Video Seminars, 1993, pp. 21–2). Routledge’s predecessor imprints were ‘Export-Orientated Compan[ies]’ with ‘Overseas Branches’, and they

increasingly 'Relocat[ed] Production'. Over the decades reviewed here, Routledge and its parent companies experienced both the commercial benefits and the organizational tensions inherent in achieving 'Insiderisation' in different global markets, before introducing structures to also operate as a more integrated 'Global Company'.

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