

# OVERCOMING GLOBAL GIANTS IN THE LOCAL MARKET: HOW JOLLIBEE HAS BEEN COMPETING AGAINST MCDONALD'S<sup>1</sup>

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## Abstract

In this study, the author tries to figure out the secret of success through the history and strategy analysis of the case of Jollibee Foods Corporation (JFC), and tries to bring out effective strategies for local companies to compete against global giants in the local market and implies critical success factors (CSF).

## INTRODUCTION

After the harsh of the USSR and the end of the cold war, the U.S. has been becoming the only one global giant and the U.S.-led globalization or so called "the Anglo-American system" has been spreading world-wide as the de facto standard. Under such a situation, McDonald's became No.1 in every country in the world except the Philippines where JFC has had overwhelming strength against McDonald's.

JFC was started by Chinese-Filipino Mr. Tony Tan Caktiong (TTC) as an ice-cream parlor in 1975. 30 years after its foundation, it has grown up to a huge fast foods conglomerate. It gained No.1 popular company in the Philippines for years.

At present, its operation is not only domestic but also overseas in such places as U.S.A., Hong Kong, and other countries. JFC offers fast foods such as hamburgers, fried chicken, pasta, etc. and it is the most popular fast food restaurant in Philippines.

The objectives of this study are to analyze strategies that JFC adopted, to seek the secret of their success, and to present CSF of JFC for the purpose of giving implications for local companies

to overcome global giants in the local market. In order to obtain such goals, we will use history analysis and strategy analysis including analysis of competition focusing on the domestic development of JFC.

## METHODOLOGIES OF ANALYSIS

### Methodology of History Analysis

In analyzing this case historically, we use the History Analysis Chart shown in the Appendix.

In this chart, GE, PS, MT, PR and RL represents general affairs, product and service, market, promotion, reputation and legitimacy respectively. And each event shall be marked in applicable categories by (+) – in case the event promotes its performance, or (-) – in case the event constrains or hinders it.

The reasons I selected these elements in history analysis are:

1. Objectives of history analysis is to illustrate how a certain company grew up and developed, and to know what kind of strategies were adopted and how they were implemented to realize its growth and development.
2. Basically a new venture needs to clarify three elements such as: what to sell (products & services), whom to sell to (market), and how to sell (promotion).
3. Furthermore, legitimacy and reputation play a significant role for a company to get acknowledged and accepted by its customers and other stakeholders.
4. Therefore, we classify each historical event into five categories as explained above.

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<sup>1</sup> This paper is based on the paper would have been presented in the International Conference of Business and Information at Honolulu in 2008 (ICBI2008), which was canceled due to the author's accident and has been unpublished.

### Methodology of Strategy Analysis

In order to analyze strategy of overcoming its competitors, we can utilize the following tools.

#### 1. Four-Tier Structure of Market and Type of 'glocalization'

##### • Four-Tier Structure of Market

In considering domestic competitions in developing countries, we have to consider the characteristics and structures of markets in developing countries.

Khanna & Palepu (2006) introduced the Four-Tiered Structure of Markets (See Chart 1). They insisted that most product markets comprise four distinct tiers: global, glocal, local, and regional.

In the Global segment, products of global quality with global features at global prices are offered. In the Glocal segment, products of global quality with local features (and local soul) at less than global prices are offered. In the Local segment, local products with local features at local prices are offered. The Regional segment can afford to buy only the most inexpensive products (Khanna & Palepu 2006: p.5).

Multinational corporations typically compete for consumers and talent only in the global tier. Meanwhile, smart local companies, which dominate the local tier, move into the global tier and also create breakthrough products for the bottom segment as economies liberalize. These businesses often become emerging giants (Khanna & Palepu 2006: p.4).

##### • Type of 'Glocalization'

As objectives of 'glocalization' can be product/service and business model, two types of 'glocalization' – product/service 'glocalization' and business model 'glocalization'.

With this typologies more specific characteristics of a firm's 'glocalization' can be obtained (See Chart 2).

Chart 1 Four-Tiered Structure of the Market in Developing Countries

	quality	feature	price
global	global	global	global
glocal	global	local	less than global
local	local	local	local
regional	the most inexpensive products		

Source Khanna & Palepu 2006

Chart 2 Type of 'glocalization'

	Product/service	
Business model	global	local
	glocalization	glocalization
	glocalization	localization

2. Porter's competitive strategies, such as Generic Strategies (1980) and Forces Governing Competition (1980) in an Industry when we can draw maps of competition. Of course though we must consider strategy based on Resource Based View (Barney 2002) and Core Competence (Prahalad & Hamel 1990), we shall focus on the competition between McDonald's and JFC, and adopt Porter's positioning approach – especially Generic Strategies in this paper.

### CASE OF JOLLIBEE FOODS CORPORATION

#### Corporate Profile

Foundation: 1975 in Quezon City, Philippines  
 Headquarters: Emerald Ave. Ortigas Center, Pasig City, Metro Manila, Philippines  
 Founder, President & CEO: Tony Tan Caktiong  
 Industry: Fast Food Restaurant  
 Revenue: 33,911 million Philippine Pesos (2006)  
 Number of stores: 1,527 (as of fiscal year end of 2006)  
 Number of employees: 32,440 (as of fiscal year end of 2006)

## HISTORY ANALYSIS

We listed our history analysis in APPENDIX in this paper. According to this analysis, we can point out the following issues:

By the time it listed its stock in 1993, JFC concentrated on the following strategy. JFC tried to improve customers' recognition and reputation by adopting mascots and a logo, development and introduction of new products, and active sales promotions through TV and music. It enabled a sharp increase of stores including franchising, and built up to the undisputed position in the domestic market (Market Penetration Strategy).

After listed its stocks, JFC grew and developed sharply through active franchising, Joint Venture and M&A both in domestic and in overseas by utilizing the credibility, reputation and funds obtained by the stock-listing.

## STRATEGY ANALYSIS

McDonald's, one of the U.S. fast food Giants entered the Philippine market in 1981.

Before then TTC had already learned that sooner or later McDonald's would enter the Philippine market and he went to the States and observed his future possible competitor and gathered information as per a lesson from the ancient Chinese military tactician Sun Tzu.

TTC had three options to cope with this problem: sell Jollibee to McDonald's, be its franchise holder in Philippines, and fight McDonald's. He took the third option.

Using the same strategies that made McDonald's successful: the mascot, the colorful uniforms of the crew, their cheerful greetings, French fries, fried chicken and a burger with Filipino tastes and lower price, JFC decided to fight McDonald's.

Though McDonald's had much financial strength and highly developed operation systems, Jollibee had one major asset that Filipino consumers preferred the taste of Jollibee's hamburger by a wide margin (Bartlett 1998).

After entered into the Philippine market, McDonald's opened six stores in 2 years and spent much money for sales promotions. Per store sales quickly surpassed Jollibee's and by 1983,

McDonald's had grabbed a 27% share of the fast food market, within striking range of Jollibee's 32% (Bartlett 1998).

In August 1983, the political turmoil started with the assassination of 'Ninoy' Aquino. The instability of political status influenced the economy and it made most foreign investors including McDonald's reduce their investment in the Philippines.

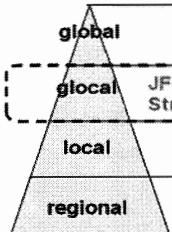
By the time President Marcos fled the Philippines after the mass demonstration of "people power (EDSA I)," and the political stability called economic stability in Philippines under the Corazon Aquino Administration, Jollibee developed its core menu with taste-tested offerings of chicken, spaghetti and a unique peach-mango dessert pie, all developed to local consumers' tastes and opened its stores.

When the McDonald's came back into the market, Jollibee had 31 stores and the dominant presence in the market.

Now, if you ask 10 Filipinos "Which do you like better Jollibee or McDonald's?" then more than nine out of ten would reply "I prefer Jollibee, it is the best taste for us." And Jollibee even became a part of their culture. Everyone likes Jollibee – from little children to old people. And eating in Jollibee is a young girl's fashion statement.

Using the tool of Four-Tiered Structure of Market, JFC's strategy falls into Glocal Strategy (Chart 3). Its product/service are global with local taste (feature) and cheaper price than global one.

Chart 3 JFC's Strategy in Four-Tiered Structure Market

		quality	feature	price
	global	global	global	global
	glocal JFC's Strategy	global	local	less than global
	local	local	local	local
	regional	the most inexpensive products		

Source Khanna & Palepu 2006

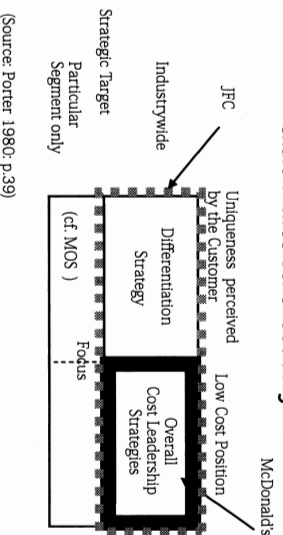
Using the Porter's Generic Strategy Model (1980), McDonald's usually adopts 'Cost-leadership Strategy' (Chart 4). In order to survive competition with this global giant, a successful option is not to choose the same strategy of the giant. In other words, in order to overcome global giants,

'Differentiation Strategy' or 'Focus Strategy' is a successful option<sup>2</sup>.

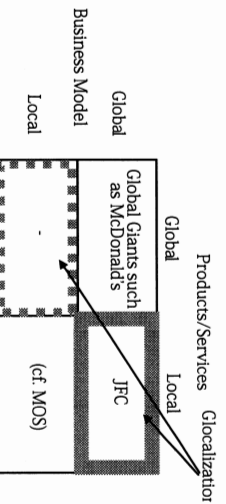
However JFC chose head-to-head competition to McDonald's and adopted 'Differentiation Strategy' and 'Cost-Leadership Strategy' simultaneously (Chart 4). It differentiated tastes for local needs and wants (localization) with adopting the same strategy as McDonald's adopted (globalization) (Chart 5).

Though the political turmoil during 1983 and 1986 that was the most significant timing for the competition between JFC and McDonald's helped JFC's survival and triumph in the market, a fundamental reason of success lies in the basic strategy of JFC – in order to realize its philosophy of Five Fs: Friendliness, Flavored foods, Fun atmosphere, Flexibility in catering customer needs, and Focus on families – it integrated products development and promotions with friendly naming of products, logo and mascots and campaigns. TV promotions and songs were effective and made its popularity higher, and various kinds of awards obtained from various institutions made its reputations better. As a result, JFC has been No.1 company in Philippines for 8 consecutive years (as of 2006).

**Chart 4 Three Generic Strategies**



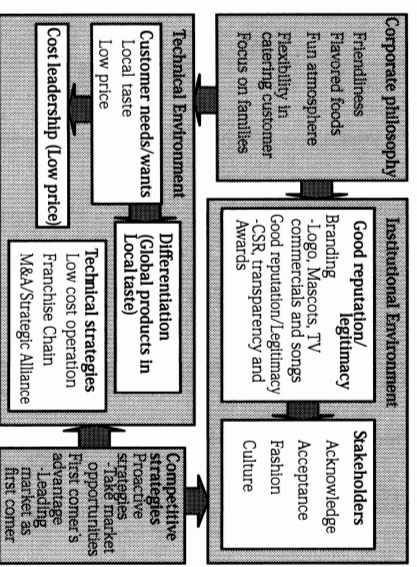
**Chart 5 Type of Globalization  
(Products/Services vs. Business Model)**



## STRATEGIES AND CRITICAL SUCCESS FACTORS OF JFC

The author carried out History Analysis and Strategy Analysis of Jollibee by the previous chapters. Through the result of those analysis, we hereby draw a whole picture of JFC's strategies (See Chart 6).

**Chart 6 Whole picture of JFC's strategies**



The author proposes the concept of 2 kinds of environments here: technical and institutional (Meyer, Scott & Deal 1981: pp.46-48, Scott 1992: pp.13-14). In technical environments a firm tries to maximize its sales and make its operation more efficient and profitable. On the other hand, in institutional environments, it tries to obtain stakeholders' acknowledge and acceptance through good reputation and legitimacy. Therefore corporate strategies have to be considered in both environments. In technical environments, JFC tried to meet customers' needs and wants: global products/service in local taste and local price (lower price than global standards). In order to realize these requirements, JFC pursued Global products/service in local taste and built up low cost operation systems simultaneously, while McDonald's brought American taste (global products/features) in the local market with a low cost operation. In institutional environments, JFC made effort to establish its brand with its logo, mascots and TV

<sup>2</sup> MOS Food Japan adopted Focus Strategy (Focus-Differentiation) and fled from the lower price war and survived and climbed up to the 2nd place in the hamburger market in Japan.

commercials and familiar songs. It also tried to keep Corporate Social Responsibility (CSR) and to keep transparency to every stakeholder as much as possible. It made JFC to be one of the most respectable and popular companies in Philippines for years and as a result TTK was selected the best entrepreneur in 2004. Thus its good reputation and its legitimacy have been accumulated. Furthermore, JFC has been the most popular fast food restaurant in Philippines for more than 20 years and for young generation JFC has been the most popular place and it becomes their fashion to eat and stay in Jollibee, or even a part of their life or culture, as McDonald's does in other countries.

We summarize CFS of Jollibee as follows.

1. JFC entered into the fast foods market earlier than McDonald's debut in the Philippines. It even created and led the fast foods market in Philippines. That was the reason it could enjoy the first comer's advantage.
2. Furthermore, it was the great luck for JFC that the incident of the EDSA I – the collapse of Marcos administration – brought suspension of foreign investment in Philippines because of political instability. And during such period JFC expanded its chain stores and built a competitive advantage against foreign competitors.
3. As a local company which knows local needs and local wants well, JFC developed its low cost operation systems with local tastes.
4. Same as McDonald's did in USA, JFC created its logo, mascot – a red bee wears a chef's hat, advertisement, etc. and tried to make good corporate image. Through TV commercial, friendly songs, branding, and good corporate image, it became the most popular company for all generations in the Philippines.
5. JFC also built its low cost operation systems, and obtained the competitive cost leadership position in the fast foods market in Philippines the same as McDonald's. The price of JFC is thought to be cheaper than that of McDonald's among peoples.
6. JFC grew and developed through M&A of such companies as Chaw King (chicken wing & Chinese foods), Greenwich (pizza & pasta), Red Ribbon (cakes), Deli France (sandwiches and drinks), and Yonghe King (Chinese foods) by utilizing synergy effects among these brands and menus.
7. The good reputation that JFC obtained brought TTC's selection of the best entrepreneurship awards 2004 in Philippines and many other awards to JFC. And it strengthened JFC's legitimacy and good reputation as the result.
8. It is a kind of fashion for young people in Philippines to eat and stay in Jollibee. For them, Jollibee is the most familiar place because they have known Jollibee since they were young children and Jollibee is their part of life and even their culture.
9. JFC has experienced organizational learning especially in overseas operations which enables elaboration of its managerial and operational expertise.

## CONCLUSION: FUTURE ISSUES

Lopez (2007) pointed out that JFC is losing ground to McDonald's due to deterioration of its service level in store operations, and McDonald's introduction of a new menu and active store development, extensive advertising and promotional campaign beginning in the latter part of 2005. If Mr. Lopez's indication is correct, sooner or later, McDonald's may catch up with JFC in the near future. It is more significant that, if JFC's service level is really deteriorating due to bureaucratic and non-customer-oriented manners, the reputation and brands of JFC may be damaged someday, and once some kinds of scandals – such as foods poisoning due to ill management of quality control – occur, its reputation may be heavily damaged and customers may leave.

McDonald's also has been trying to construct stores adjacent to JFC stores to challenge head-to-head competition and defeat JFC. Thus new competition between JFC and McDonald's started and it becomes one of critical future issues how to compete against McDonald's – a global giant.

## APPENDIX

## History Analysis Chart

year	Activities	GN	PS	MT	PR	RL
1975	TTC & his family opened Ice Cream Parlor at Cubao	+	+			
1978	JFC established (100% Filipino Company)	+				
	Bakery was established in Cubao		+			
1979	Jollibee posted 1 <sup>st</sup> year sales of PHP 2 million	+				
	Spaghetti Special was introduced		+			
1979	1 <sup>st</sup> Franchise owned store opened at Ronquillo Sta. Cruz.			+		
1980	Jollibee launched 1 <sup>st</sup> TV commercial				+	
	Jollibee Chicken Joy and French Fries were introduced		+			
	Jollibee mascot debut				+	
1981	JFC earned a list of Top 1000 Corporations					+
	Jollibee ended the year with 10 stores	+				
1982	In-store promotions, premium items & Kiddie Birthday packages		+		+	
	Palabok Fiesta was introduced		+			
1983	The Langhap-Sarap TV ad Campaign		+		+	
	Chickee and Lady Moo join the Jollibee mascots				+	
1984	Champ hamburger was introduced		+			
	Jollibee entered list of Top 500					+
	Mascot Champ and Hetty joined the Jollibee family				+	
	Jollibee obtained Gold record award for the sales of Jollibee songs				+	+
1985	Jollibee became the market leader of the fast food industry					+
	Breakfast Joy was introduced		+			
	Langhap-Sarap awards the 9 <sup>th</sup> Philippine Advertising Congress				+	+
1986	Jollibee won the 9 <sup>th</sup> International Foods Award in El Comestible					+
	TTC won the Agora Award for entrepreneurship by the Philippine Marketing Association					+
	JFC entered Top 250 Corporation list					+
	Jollibee opens its 1st international store in Taiwan				+	
	Jollibee added Chunky Chicken Sandwich in its menu		+			
1987	2 <sup>nd</sup> Taiwan store opened			+		
	Sales of PHP 570 million pushed Jollibee into the elite Top 100 Corporation	+				+
	Jollibee opened 1st fast food outlet in Brunei				+	
1988	Jolly Twirls softserve was successfully launched		+			
	Jollibee system wide sales hit PHP 921 million, further leading market share of 31% in the fast food industry and a dominant 57% share in the hamburger segment	+				
	Jollibee celebrated 10 <sup>th</sup> year anniversary	+				
	TTC was named one of the Ten Outstanding Manilans					+
	Jollibee won the Anvil Award for outstanding PR campaign in relation to the achievement of marketing objective with its Filipino Talents campaign					+
1989	2 <sup>nd</sup> Brunei store opened					+

	Balut and Ligaw TV commercials won the Kidlat Award in the Service and Leisure Products category during the 11 <sup>th</sup> Philippine Ad Congress	+	+	+
	Jollibee sales hit PHP 1.3 billion marked, first fast food chain to surpass billion-peso sales marked	+		
1990	Jollibee added coleslaw, Jolly Hotdog, Chikenjoy Take-Me-Out and Peach mango Pie to its ever-growing menu	+		
	Jollibee post sales of PHP 1.8 billion	+		
	TTC was awarded the Triple Award by AIM as Outstanding AIM Alumnus			+
	Jollibee received the Excellence in Marketing Management Award from the Asian Institute of Management			+
1991	Jollibee's 100 <sup>th</sup> store opened in Davao City		+	
	Jollibee opened a record high of 35 new stores		+	
	Opened 1st outside Luzon in Cagayan de Oro City		+	
	Jollibee launched its Pancakes and Jolly Meals		+	
	Jollibee sales hit a whopping PHP 2.65 billion	+		
	The Lola TV commercial won the Grand Araw Award and an award of excellence for the promotion of Filipino Values during the Philippine Ad Congress		+	+
	Jollibee received award for the outstanding Corporate Safety Consciousness Program by the Safety Organization of the Philippines (SOP)			+
1992	Jollibee sales hit the PHP 3.365 billion	+		
	Started using frozen patties for its popular hamburgers		+	
	Improved soft serve ice cream line by offering fruit flavored ice cream		+	
	Acquired 73% of the Hamburger segment (in the market)	+		
	Opened another store in Jakarta totaling to 2 stores in Indonesia		+	
	Jollibee had 112 stores nationwide		+	
	Maintained its advantage over its competitors by acquiring more than 50% share of the fast food industry	+		
1993	July 13, JFC was listed in the Philippine Stock Exchange with an initial offering of PHP9.00 per share	+		+
	JFC share were being sold for PHP 20.00, a windfall or more than 135% in October	+		
	Improved softserv ice cream line by offering fruit flavored ice cream		+	
	Marketing launched its At Home Ako sa Jollibee ad campaign, focusing on Jollibee's loyal customers			+
	Introduced the Kiddie Pack Promo		+	+
	Moved to Jollibee Centre Building in Ortigas Center, Pasig, the new Main Office site	+		
1994	148 Jollibee stores nationwide by the year end	+		
	Jollibee expanded into the pizza-pasta segment with the acquisition of Greenwich Pizza Corporation		+	+
	Jollibee was cited as one of the leading companies in Asia by the Far Eastern Economic Review			+

1995	Jollibee acquires franchise of Delifrance	+	+	
	20 more stores opened in the Philippines, bringing the total to 168		+	
	Jollibee successfully opens stores abroad: Guam, Dubai, UAE, Kuwait, Jeddah and Saudi Arabia		+	
1996	Jollibee opened its 200 <sup>th</sup> stores in Malolos, Bulacan		+	
	Jollibee was cited again as one of the leading companies in Asia by the Far Eastern Economic Review			+
	The company reengineered its visual identity system	+		
	Jollibee system wide sales increased to PHP 8.29 billion which translated to a market share of more than 50% among all hamburger fast food chain	+		
	Jollibee had 208 stores nationwide		+	
	July 10: Mary's Chicken was born; a semi-self service restaurant and another Jollibee subsidiary.		+	
	The company reengineered its visual identity system	+		
	Amazing Aloha was launched		+	
	1 <sup>st</sup> Jollibee store in Hong Kong opened		+	
	Jollibee launched various projects, such as Maaga ang Pasko sa Jollibee and Chikiting Patrol: at Home Ako Dito. These projects' main objective was to protect and contribute to the development of the Filipino children.			+
1997	System wide sales increased to PHP 11.17 billion	+		
	Jollibee International opened Jollibee Xiamen located in the People's Republic of China		+	
	Jollibee launched "Kaya mo Kid" project which aims to instill positive values, which helps children achieve their dreams and ambitions.			+
1998	Jollibee opened in Daly City		+	
	The company celebrated its 20 <sup>th</sup> year anniversary	+		
	Opened 62 stores nationwide, bringing the total to 300 stores		+	
	Jollibee opened its 300 <sup>th</sup> store in Balagtas, Bulacan		+	
	Jollibee receives the ISO9002 Certification for its frozen patty line			+
	Jollibee wins the Employee of the Year Award			+
1999	Opened 50 stores nation-wide; total of 350 stores		+	
	Introduced the Cheezy Bacon Mushroom Burger to its line of specialty burgers	+		
2000	31 more Jollibee stores opened, bringing the total to 381 stores		+	
	Jollibee acquired Chowking Foods Corporation	+	+	
	For the 3 <sup>rd</sup> straight year, Far Eastern Economic Review ranked Jollibee as the Philippines' leading company			+
	Asian Business Magazine ranks Jollibee as the Most Admired Company in the Philippines and the 3 <sup>rd</sup> over-all in Asia, surpassed only by global giants General Electric and Microsoft			+
	Systemwide sales reached PHP 20 billion	+		
2001	Jollibee opened its 400 <sup>th</sup> store in Intramuros		+	
	Systemwide sales rose to 18.8% to PHP 24.11 billion. Income, before non-recurring charges, to PHP 959 million. Network expanded to 800 restaurants	+		



2002	Revenues neared the PHP 27 billion mark. Number of stores exceeded 900	+
	TTC made MAP "Management Man of the Year"	+
2003	Jollibee store count close to 988 stores nationwide For the sixth straight year, the Far Eastern Economic Review ranked JFC as the Philippines' Leading Company	+
2004	TTC was named the Ernst and Young's 2004 World Entrepreneur of the Year	+
	JFC acquired 100% of the Red Ribbon Bakeshop	
2006	In January 2006, JFC acquired Green Foods Franchising, Inc.'s 20% stake in Greenwich Pizza Corporation for 384 million pesos which were paid in cash.	+
	JFC entered into a new business venture with Ice Tea International, Inc., and affiliate of Chun Sui Tang Tea House Ltd., in Taiwan. JFC got the exclusive right to operate a restaurant chain in China that carries the Chun Shui Tang Tea House brand.	+
	Opened the first Chun Shui Tang Tea House in Shanghai on May 20. On September 29, JFC also acquired the 50% stake of its joint venture partner.	+
	Delifrance Asia Ltd. (DAL), in Baker Fresh Foods Philippines, Inc. (BFFPI) making BFFPI a wholly-owned subsidiary of JFC, and the Delifrance business in Philippines managed solely by JFC.	+

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