# A CONCEPTUAL MODEL FOR THE INTERNATIONAL TRANSFER OF THE JAPANESE MANAGEMENT SYSTEMS

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#### **ABSTRACT**

The transferability of Japanese management systems (JMSs) abroad has been studied intensively since the 1980s. However, the conclusions regarding this study field are mixed. Such confusion is caused by the vague definition of terms and the different methods employed by researchers to measure the transferability of the management systems abroad. This paper proposes a new conceptual model based on the perspectives of contingency and hybridization theory, with the aim of understanding the transfer process and the factors influencing this process.

**Keywords:** International Japanese management transfer, transfer process, conceptual model

# **INTRODUCTION**

Since the 1980s, the transferability of Japanese management systems (JMSs) to a non-Japanese setting has been examined extensively. Such transfers were realized primarily due to the fact that the JMSs were considered one of the major reasons for the high performance achieved, particularly in the car manufacturing industry (e.g. Schonberger, 1982; Womack et al., 1990). The rapid increase in the Japanese foreign direct investment during the 1980s by Japanese firms posed two questions: 1) Are the Japanese companies transferring their management systems to their counterparts? 2) To what extent are they transferable? Existing research already verified the first question; Japanese companies are transferring their management systems overseas. However, regarding the transferability of JMSs is still open to discussion. The purpose of this paper is to determine the transferability of the JMSs abroad. It draws upon the existing literature regarding the international transfer of management systems to provide a conceptual model in order to obtain insight in the transfer process and the factors influencing the process.

### LITERATURE REVIEW

The international transfer of management has been studied with respect to the American management since the 1960s and the Japanese management since the 1980s. The findings can be categorised in various ways.

First, a group of author asserts that management systems can be transferred regardless of the cultural differences (rationalist). They conclude that the development of the management is based on the general logic, thus; it is transferable overseas (e.g. Harbison and Myers, 1959).

Second, opposite to the rationalist, culturalists assert that management systems are difficult to transfer aboard because the environmental context is different from one country to another (e.g.

Oberg, 1963; Fukuda, 1988; White and Trevor 1983). Oberg (1965) conducts a survey among managers in the Brazilian and the US companies and reveals that there is a gap regarding the major problems they are facing. It indicates that general strategy or any set of generalization or principals are very difficult to apply to both situations. Koontz (1969) argues that different conclusions are caused by vague concepts or definitions that researchers utilize. Concepts such as 'management philosophy' are not mentioned or clearly defined. Moreover, researchers frequently do not distinguish types of transfer. The major distinction between them is whether companies are transferring their own management systems to their oversea counterparts or the companies are emulating the management practices developed in different cultural context. This distinction is important because it affects the conclusion of the transferability of management. Oliver and Wilkinson (1992) indicate Japanese firms sending their management systems to their overseas subsidiaries tend to be more successful than the British companies emulating them. It is because the Japanese companies have the advantages in terms of 'greenfield' sites and by implication (selected) 'green' labour so that they are not restricted by history and traditional industrial relations in the UK (Oliver and Wilkinson, 1992).

Third, universal management theory asserts that particular management systems (often associated with the term 'best practice') are applicable across the nations (Koontz, 1969; Ouchi, 1982; Kono, 1992). The difference between the rationalist and the universal management theory is that the former believes management techniques are developed through rational thinking; thus, they are applicable across the boarder. The later theory separates the science part (practices developed based on the rationale) and the art part (practices rooted in the culture) of the management and asserts that science part of the management is universally applicable (Koontz, 1969). The universal management theory seems to compromise the view of the rationalist and the culturalist. However, it has to admit that management systems that are mentioned as universal were rejected in some environments (Abo, 1994). One of the reasons for the confusion arises from the different methodologies that authors employ to determine the transferability of management practice abroad. Kono (1992) identifies two approaches. One is to observe the practices in the subsidiaries in foreign countries. The other is to observe well-managed companies and find the similarities. Universal management theorists such as Kono (1992) and Ouchi (1982) employ the second approach. These different approaches can affect the conclusions. While the first approach is investigating the transferability of management by defining the term 'transfer' as 'move from one place to another,' second approach is hypothesizing that JMSs are transferable because the similar management systems are used in the different cultural context. In addition, culturalist, rationalist, and universal management theorist assume that it is environmental distance alone influences the transferability of the management systems and tend to ignore the impact of other variables such as strategies.

Fourth, these arguments lead to the next school of thought, a contingency theory approach. This approach indicates that there are several major strategic, organizational, and environmental factors affect the transfer process of management systems overseas (Beechler and Yang, 1994). Therefore, the transferability of management systems depends on the situation. The central theme of the contingency theory is that 'a good fit' (strategy, policy, and practices with the context) will lead to good performance.

Finally, the proponents of the hybridization theory assert that management systems are neither rejected nor accepted but hybridized with the locally used management systems. Authors such as Abo (1994), Itagaki (1997), and Kumon and Abo (2004) have been conducted a set of research projects since the mid 1990s. The hybridization theorists use the 'Hybrid evaluation model' to evaluate the degree of adaptation of the JMSs to the locally used management systems.

To sum up, empirical evidence regarding the international transferability of the management systems is categorized in five schools. We find the contingency theory perspective is reasonable because much empirical evidence reveal that there are several contingency variables affecting the transfer process (Kujawa, 1983; Oliver and Wilkinson, 1992; Kenney and Florida, 1993). Moreover,

the hybridization theory is also an understandable base because several authors indicate that management systems are modified in order to correspond to the local environment (Ueki, 1982; Negandhi et al., 1985; Jain, 1990). The culturalist perspective does not explain the theory that some management systems that are developed under the certain culture have been successfully transferred overseas. The rationalist also does not describe the culturalist's view why many organizations are in fact failed or facing difficulties transferring their management systems overseas. The universal management theory has to admit that management systems which they indicate as universal have been rejected in different environment.

On these bases, we find the perspectives of contingency and hybridization theory are appropriate for this research. Consequently, our proposition of this research is that management systems are hybridized with the locally practiced management systems and the degree of hybridization is determined by the situational circumstances. Currently, the adaptability of the JMSs is not well established due to the factors previously indicated. To obtain the better insight, the research questions are formulated as follows: How do the JMSs transferred overseas? How and why do the JMSs hybridize with locally used management systems? What are the major factors determining the transfer process and how and why? Regarding the type of transfer, the interest for this research is that the Japanese companies transfer their management system to their overseas counterparts. These questions are selected because the degree of replication or non-replication of Japanese practices overseas have been intensively researched but about how and why it happened was not yet well discussed. The 'Hybrid evaluation model' used by hybridization theorists can provide us the information regarding in what extents do management systems had been modified or adjusted to the local environment but provides little explanations on how and why the hybridization occurs and the different degree of hybridization takes place (Taylor, 1999).

The Japanese management approach is generally defined from two perspectives (Sours, 1982). One is from the cultural perspective which views the JMSs are rooted in concepts such as groupism, long-term relationships, and consensus stemming from the historical and cultural background of Japan (Abegglen, 1958; Dore, 1973; Hayashi, 1984). The specific aspects include the lifetime employment, seniority-based pay system, and consensus decision-making (Jain, 1990). The other is from the universal perspective that explains the JMSs were transferred from the US after the World War II, adopted and integrated to the Japanese context. These practices include TQM, JIT, and quality control circles (Cole, 1979; Oliver and Wilkinson, 1992). We analyze the literature regarding the Japanese management (Abegglen, 1958; Ueki, 1982; Shimada, 1990; Kenney and Florida, 1993; Oliver and Wilkinson, 1992; Abo, 1994; Chen, 1995).

Table 1 – Japanese management systems

HRM practice	Hiring	<b>Lifetime employment/long term employment</b> (Abegglen, 1958; Ueki, 1982; Oliver and Wilkinson, 1992; Kenney and Florida, 1993)
		Hiring directly from the school (Abegglen, 1958; Ueki, 1982; Oliver and
		Wilkinson, 1992; Kenney and Florida, 1993; Abo, 1994)
		Systematic hiring procedure (Abegglen. 1958)
	Training	Internal training system, OJT (Ueki, 1982; Shimada, 1990; Abo, 1994)
	Promoting	Seniority based promotion (Abegglen, 1958; Ueki, 1982; Abo, 1994)
	Compensating	Seniority based payment (Abegglen, 1958; Ueki, 1982; Oliver and Wilkinson,
		1992; Kenney and Florida, 1993)
		Bonus as incentives (Abegglen, 1958; Kenney and Florida, 1993)
		Public welfares (Ueki, 1982; Abo, 1994)
	Evaluating	Evaluation through the whole personality (Ueki, 1982)
Employee		Quality Control Circles (Ueki, 1982; Oliver and Wilkinson, 1992; Kenney and
participation		Florida, 1993; Abo, 1994)
practices		Consensus decision making (ringi system) (Ueki, 1982; Chen, 1995)
		Information sharing (Ueki, 1982; Abo, 1994)
Production		Total Quality Management (Oliver and Wilkinson, 1992; Abo, 1994)

management		In Process management (Ueki, 1982; Oliver and Wilkinson, 1992; Abo, 1994)
practices		JIT inventory control (Ueki, 1982; Oliver and Wilkinson, 1992; Abo,1994)
		Multifunctional skills (Ueki, 1982, Shimada, 1990; Abo, 1994; Kenney and
		Florida, 1993)
		Job rotation (Shimada, 1990; Kenney and Florida, 1993)
		Small lot production (Ueki, 1982)
		Kaizen (Oliver and Wilkinson, 1992)

The JMSs in this paper are defined in Table 1. This paper proposes a new model on the perspectives of contingency and hybridization theory which can help in understanding the process of Japanese management transfer. A term 'model' is generally defined as "An external and explicit representation of part of reality as seen by the people who wish to use that model to understand, to change, to manage and to control the part of reality" (Pidd, 1996; pp.120). Newman and Robey (1992) introduce two different types of model: 'factor' and 'process.' A factor model is used to explain the causal relationship and the degree of the strength of the links between the independent and dependent variables using the statistic techniques. However, it does not explain how or why the variables have a relationship. A process model can provide the story that explains the degree of association between predictors and outcomes (Newman and Robey, 1992). The advantage of process model is that it can describe how and why the results of development efforts are achieved (Newman and Robey, 1992). Transfer management is conceived as a sequence of events that occurs over time. For that reason, the process model is used to describe the dynamics of transfer process of JMSs overseas.

### STAGES IN THE PROCESS

Authors such as Ueki (2003) present a process model with four stages in international transfer of JMSs. However, it is a conceptual base and not supported by the empirical evidence. Okamoto (2000) introduces a process model with four phases that provides us with a broad idea of the technology enhancement process in local subsidiary overseas. In his approach, a number of variables that are used to distinguish each phases are not explicitly defined and most of the phases overlap. For that reason, more general process models from the technology transfer (Teece, 1976; Miles, 1995; Steenhuis, 2000) and the knowledge transfer (Gilbert and Cordey-Hayes, 1996; Szulanski, 2000) are employed as a base. Privilege aspects of those models are also useable for describing the transfer process of JMSs.

Teece (1976) researches the international horizontal transfer of technology emphasized on the design transfer. He identifies five stages in the technology transfer projects. 1) Pre-investment or feasibility study stage: Need assessment and feasibility study are conducted. 2) Stage A: Key elements of the process or product design will be transferred. 3) Stage B: Engineering and design, and the planning of production are discussed with respect to continuous flow process technology, and with respect to product technology. 4) Stage C: Construction, tooling, and installation of the manufacturing facilities take place. 5) Stage D: The recipient of the technology starts up the manufacturing.

Miles (1995) defines the technology as a combination of 'hardware' (buildings, plant and equipment) and 'software' (skills, knowledge, and experience together with the institutional arrangements) which are applied to solve practical problems. He identifies five basic phases in the process of technology transfer: 1) Choice of technology, 2) channels for transferring technology, 3) adapting technology, 4) integrating the technology, and 5) implementation.

Steenhuis (2000) discusses eight existing process models of technology transfer and develops a process model for the horizontal transfer of production technology at the company level. The model contains six phases: 1) Strategic phase: Activities include identification of opportunity, prefeasibility study, support study, feasibility study, appraisal, and concluding with a contract. 2) Tactical phase: Specification of the production facility is developed together with the planning

activities. 3) Preparatory operational phase: The manufacturing facility is set up. 4) Preparatory operational phase: Preparations of human resources take place. 5) Operational phase: The operation of the production is started. 6) Operational phase: The production performs as same quality as the sender of the technology does.

Gilbert and Cordey-Hayes (1996) develop a model of the process of knowledge transfer to understand the ability of organizations to innovate and successfully achieve technological and organizational change. The model consists of five stages. 1) Acquisition stage: The acquisition of the knowledge take place before it can be transferred. 2) Communication stage: The distribution of the acquired knowledge takes place through both written and verbal communication. 3) Application stage: The knowledge acquired and communicated is then applied to be retained. 4) Acceptance stage: The individuals in the organization accept the new knowledge before it can be assimilated into the core routines. 5) Assimilation stage: The accepted knowledge becomes the core routines. This is the stage where the organization benefits the effects and the result of the new knowledge applied.

Szulanski (2000) offers a diachronic analysis of 'stickiness' (the difficulty of transferring knowledge) based on a model of the transfer process of organizational model. He presents a process model of knowledge transfer which is composed of four stages: 1) Initiation, 2) implementation, 3) ramp-up, and 4) integration. He divides each stage by the four milestones: 1) Formulation of the transfer seed, 2) decision to transfer, 3) first day of use, and 4) achievement of satisfactory performance.

In conclusion, although there is a vast amount of literature about the Japanese management transfer, the process for the Japanese management transfer is less intensive. The process modes in the study field of technology and knowledge transfer are available. However, these models are too general that it is difficult to select one model for applying specifically to the JMS transfer process. Thus, a new phase model particularly focusing on the international JMSs transfer has been developed.

# Pre-investment stage

All the authors mention the pre-investment stages in the transfer process. The pre-investment stage expected to exist regarding the JMSs transfer. Szulanski (2000) indicates that the transfer process begins when the seed for the transfer is created. 'The seed for the transfers' refers to the point that needs of transferring management are realized. For example, as soon as a performance gap addressed between the parent company and the overseas subsidiary. Gilbert and Cordey-Hayes (1996) identify the similar stage in the knowledge transfer. They mention that in this stage, the organization must be aware of the possible barriers to the dissemination of information if it is its intention to encourage knowledge transfer. Teece (1976) and Steenhuis (2000) indicate that problematic search for suitable solution and the need assessment, feasibility study is executed in this phase. Teece (1976) identifies that the verifiable measurement to measure the acceptance of the technology in this stage. Miles (1995) points out selection of technology is made in the pre-investment stage.

### Communication stage

Gilbert and Cordey-Hayes (1996) mention the communication stage in the knowledge transfer process. Szulanski (2000) indicates the similar stage in his process model but labels it as an implementation stage. Szulanski (2000) states that this stage starts at the moment the decision to transfer is made. For a period, there will be exchange of information and resources between the sender and the recipient of the management system. Information and resource exchange between them will increase and possibly peak. We prefer the label the communication stage because the most of activities for management transfer in this stage are communication between the sender and recipient of management systems. For example, Shimada (1990) conducted a descriptive study of

the activities in the Japanese-US joint venture in 1989 and found that before the first day of operation of Japanese production systems, American employees were sent to the Japanese factory to have three weeks training. Also during this period, the intensive negotiation took place between the US auto industry union and the Japanese company before they started utilizing the JMSs.

# Implementation stage

Gilbert and Cordey-Hayes (1996) state that the application stage starts when the communication stage is completed. Szulanski (2000) mentions the similar stage (what he labelled as rump-up stage) starts when the recipient starts using the management practice (e.g., starts up a new manufacturing facility, rolls over a new manufacturing process, or cuts over to a new system). He states that the main concern of this stage becomes identifying and resolving unexpected problems that keep the recipient from matching or exceeding a-priori expectations of post transfer performance. We label this stage as implementation stage because in this period, the management systems are implemented and workers start using them. Szulanski (2000) states that this stage offers "A relatively brief window of opportunity to rectify unexpected problems where the recipient is likely to begin using new knowledge ineffectively ramping up gradually towards a satisfactory level of performance, often with external assistance" (Szulanski, 2000; pp.15). Ueki (2003) mentions the comparable stage in the Japanese management transfer and states that in this stage, the local managers and engineers modify and adjust the transplanted technology and the production know-how in order to fit to the local environment.

# Integration stage

Gilbert and Cordey-Hays (1996), Okamoto (2000), and Ueki (2003) mention the existence of this stage. Similarly, Szulanski (2000) refers to this stage and states that the new management system will become fully integrated within the host organisation. He states that once the anticipated performance is achieved, the integration stage begins. However, under the circumstance of the international Japanese management transfer, we have changed the starting point of this stage to 'stable achievement of the satisfactory performance without the Japanese consultancy.' This is based on the perception that the real integration would not be achieved even after the accomplishment of anticipated performance because it could be done under the Japanese consultancy. The real integration process starts once the Japanese consultancy is ended and the autonomous operation by the local employees begins utilizing the JMSs. When the stable anticipated performance is achieved without Japanese consultancy, it is possible to say the transfer of JMSs a success. The performance indicator can be differing based on the types of management practices transferred.

# INFLUENCING FACTORS

A large amount of research has been dedicated to determine which factors affect the process of transferring JMSs overseas. Table 2 shows the summary of the major factors affecting the process and the corresponding authors.

*Table 2 – Influencing factors* 

Influencing Factors	Author (s)
Culture	Fukuda, 1988; Taylor 1999
Attitude and ethics of the employees	Jain, 1990;Ueki, 2003
Education and Training	Humphrey, 1995; Kaplinsky, 1995
Unions	Jain, 1990; Shimada, 1990; Beechler and Yang, 1994; Humphrey, 1995
Industry and sector	Abo, 1994; Beechler and Yang, 1994; Purcell et al., 1999; Taylor, 1999
Communication difficulties	Ueki, 1982; Jain, 1990, Hayashi, 1994
Legal, economic consideration	Jain,1990; Shimada, 1990; Abdullah and Keenoy, 1995; Humphrey, 1995
Locally used management practices	Ueki, 1982; Jain, 1990; Oliver and Wilkinson, 1992; Abo, 1994; Beechler and
	Yang,, 1994; Kaplinsky, 1995; Purcell et al., 1999

Administrative heritage and competencies	Beechler and Yang, 1994; Dedoussis, 1995; Purcell et al., 1999; Taylor 1999
Subsidiary resource dependency	Beechler and Yang, 1994
Size of the company	Purcell et al., 1999; Taylor,1999
Headquarter strategy	Kujawa, 1983; Oliver and Wilkinson, 1992; Kenney and Florida, 1993

Literature about factors influencing the process of transfer management abroad reveals two major streams. One stream focuses on the impact of institutional distance (Fukuda, 1988; Jain, 1990; Shimada, 1990; Hayashi, 1994; Purcell et al., 1999). Institutional distance includes both formal rules (i.e., political rules, judicial decisions, and economical contracts) and informal rules (e.g., customs, norms of behaviour) (North, 1990). The other stream emphasises the administrative distance such as strategies and capacity (Beechler and Yang, 1994; Dedoussis, 1995).

#### Institutional distance

This stream focuses on the impact of the institutional distance on the transfer process of management systems abroad. North (1990) defines the term 'institution' as "The rules of the game in a society or, more formally, are the humanly devised constraints that shape human interaction" (North, 1990; pp.3). According to him, institution includes formal constraints and informal constraints. The informal constraints are defined by codes of conduct, norms of behaviour, and conventions that are derived from the culture. Japanese culture is characterized as 'groupism' developed through the teamwork for agricultural cultivation of paddy rice field (Yoshino, 1968). Such a Japanese characteristic formed a unique management philosophy called the 'management familism' (Jain, 1990). Authors such as Fukuda (1988); Jain (1990), Hayashi (1994), and Taylor (1999) mention the influence of the informal constraint on the transfer process of management systems. Jain (1990) indicates that work ethics differences between Canadian and Japanese obstruct the transfer of the Japanese HRM practice to the service sector in Canada. Hayashi (1994) finds communication style differences are hindering the transfer of the JMSs overseas. Taylor (1999) states that "...the cultural arguments of similarities in social relations of work all tend to indicate that the process of Japanisation should be much easier in Asia than in the Western countries" (Taylor 1999; pp.130).

The formal constraints include political, judicial, economic rules and contracts (North, 1990). In the cross cultural transfer of management systems, the distance of the institution can be an obstacle to the smooth transfer of management systems (Humphrey, 1995; Abdullah and Keenoy, 1995). Beechler and Yang (1994) find that among service firms in New York, local labour market characteristics, industry features and economic conditions discourage Japanese service companies from sending Japanese-style HRM practices. Purcell et al. (1999) find that different types of industrial sector have a significant influence on the adoptability of Japanese management. In the financial service and trading company sectors, "...Japanese management style tends to be most intense and subsidiaries more 'clone-like' in appearance" (Purcell et al., 1999; pp.85). In contrast, in the manufacturing sector, the ratio of local employees is high and it is more like a hybrid appearance between the Japanese and the local management practices (Purcell et al., 1999).

#### Administrative distance

The other steam emphasizes the influence of an administrative distance on the international transfer process of the JMSs. The administrative distance includes the strategy, capacity, and the heritage of the parent company. Beechler and Yang (1994) find that the administrative heritage and belief affect the decisions of Japanese headquarters whether they want to transfer their management systems to their overseas subsidiary. If the headquarters have the conviction that transfer of Japanese management overseas is both beneficial and possible in achieving an organizational goal, that company will be more likely to transfer Japanese management practice to its overseas subsidiary. Beechler and Yang (1994) also research the impact of subsidiary strategy on the

decision of transfer management and find that the higher degree of integration between the subsidiary and the MNE required by the company's strategy, the greater the possibility that the parent company will transfer Japanese-style HRM to its overseas subsidiary. Furthermore, they find that the parent company's resource dependency on the overseas subsidiary influences the decision of headquarter whether they want to transfer their HRM system. Dedoussis (1995) indicates that the failure of transferring JMSs overseas can be attributed to poor planning and implementation, lack of support by local managers and supervisors. Purcell et al. (1999) discover that size and the experience of the company have an impact on the successful adoption of Japanese practice. They find that size of the company is not very significant but smaller firms were less likely to operate quality control circles and job training was less intensive.

#### **CONCEPTUAL MODEL**

The combination of stages and the factors that influence the transfer process leads to the development of a conceptual model (Figure 1). It identifies four stages in the management transfer process (initiation, communication, implementation, and integration) and two major types of factor that influence the transfer process (institutional and administrative distance). This arrangement is important because it provides researcher with a tool to analyze practical situations in specific stage of the transfer process. Additionally, it gives the practitioner an opportunity to assess which context-specific factors are influencing each stage of the management transfer process, the first step in being able to apply appropriate strategies to overcome the constraints factors and enhance the facilitating factors. To test this model, the case study approach is employed because it is suitable for the longitudinal and in-depth research (Verschuren and Doorewaard, 1999) Based on the predeveloped conceptual model, the cases are selected and a data collection protocol is designed (Yin, 1994). Multiple case studies are carried out, followed by a cross case analysis. Based on the analysis, a modification of the pre-developed model is implemented (Yin, 1994).

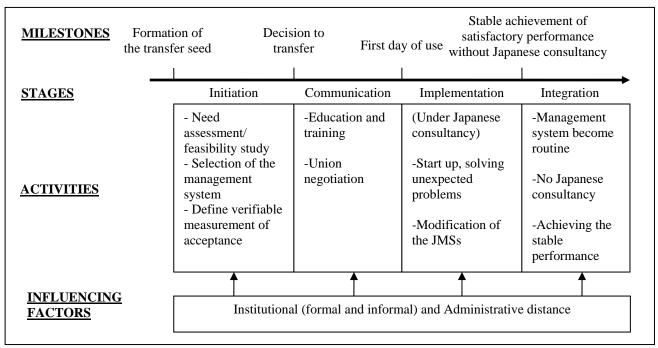


Figure 1 – A conceptual model of the JMSs transfer

### **CONCLUSION**

The transferability of JMSs abroad has been studied intensively. The conclusions can be classified in various ways. Such confusion is caused by the vague definition of terms and the different methods employed by researchers to measure the transferability of the management system abroad.

The literature also reveals that the process of transferring management has not been well researched. For that reason, a process model of transferring the JMSs is developed from the perspective of the contingency and hybridization theory. The model illustrates the stages in the process of management transfer and the major factors affecting. The stages include initiation, communication, implementation, and integration. Specific milestones separate each stage. Two major factors affecting the transfer process are institutional and administrative distance. The model provides not only a analyzing tool for researchers to determine a specific stage and the factors affecting the transfer process but also gives the practitioner an opportunity to assess which context-specific barriers are influencing each stage of the management transfer process.

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