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**Yesterday's decisions determine tomorrow's options: the case of the mechanical typewriter**

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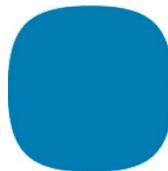
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## Yesterday's decisions determine tomorrow's options: The case of the mechanical typewriter

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*Andreas Knie*

### THE ESTABLISHMENT OF A "GOLDEN STANDARD": PERSPECTIVES ON THE GENERATION OF TECHNICAL KNOWLEDGE

Popular ideologies of technological change usually equate technological development with technological progress: the technical solutions prevailing on the market rank as the "better solution", the "better product." Here "better" means optimized functioning and performance to please the user. In the case of the mechanical typewriter, a central office appliance well into the 1970s, however, it is evident that this assumption needs to be revised. An analysis focusing on the creation phase of the mechanical typewriter provides a better understanding of the driving and constituting forces behind technical development.<sup>1</sup>

The most striking difference between the first mechanical writing machine—the writing ball (Fig. 1) designed by the Danish cleric Malling-Hansen in the 1870s—and today's typebar machine is the solid design of the latter: it guarantees exact performance at any time and any place as often as desired. Friedrich Nietzsche, one of the first and most famous owners of a writing ball, soon found out that he could not rely on his writing machine. On a trip to Italy he complained: "The weather is dull

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<sup>1</sup> Here I draw on the findings of an ongoing study (see Knie 1991b) that is part of a larger project on technological development in organizational contexts (*Technikgenese in organisatorischen Kontexten*). The research is being done by the Social Science Research Center Berlin (WZB) and the Department of Sociology at the Technical University Berlin. A part of the "Verbund Sozialwissenschaftliche Technikforschung", the project is funded by the Federal Minister for Research and Technology.

and cloudy, hence humid. The ribbon also becomes humid and sticky so that the stencils get stuck and none of my writing can be seen" (in *Die fröhliche Wissenschaft* [1882], quoted from Kittler 1986: 301). This impaired the machine to such an extent that he finally gave up using his writing ball.

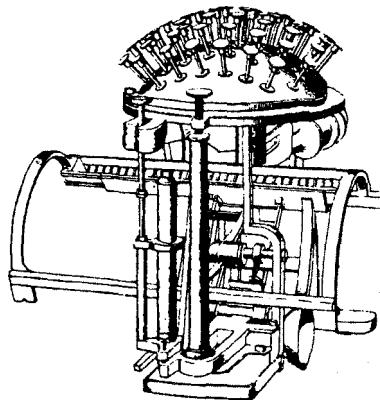


Figure 1. Writing Ball

Nietzsche and his contemporaries could choose from a great variety of writing machines ranging from typebar machines with segment shift, typeball machines and writing balls, to cheap singlebar machines (see Pfeiffer 1923; Müller 1986; Adler 1973; Baggenstoss 1977). Customers could choose between the "Universal" keyboard (which is the one still in use today), the "Ideal" keyboard, keyboards with bars for each capital and small letter, and keyboards featuring one or even two shiftkeys. This wide variety matched the different needs and desires of professional and non-professional users.

Around the turn of the century, however, typewheel and typeball machines were displaced from the market and the typebar machine established itself as the dominant technique in mechanical design, even though typing with the typebar machine was hard work (Kunzelmann 1979: 169).<sup>2</sup> The "mechanical character" of the typewriter, i.e. reliable performance regardless of time and place, was developed and preserved over the past one hundred years, but only at the expense of qualities like

<sup>2</sup> Typewheel and typeball machines became available again with the advent of electromechanical designs.

comfort and handling. During the process of construction and industrial production priority was given to securing this stable, mechanical character rather than to the users' particular needs. In other words, criteria other than the user-friendliness which is usually quoted in this regard have informed the process of generating and implementing technological knowledge. Why, then, are users of typewriters still being offered mechanical machines that after many decades of industrial maturing are still miserable to handle? This is one of the questions a research project concerned with the reconstruction of the development of the mechanical typewriter must address.

The increasing number of cases of occupational illness among typists has in the past brought harsh criticism and sometimes words of condemnation on the mechanical typewriter (see Holtgreve 1989; Davies 1979; Frevert 1979; Fritz 1982; Srole 1987). Since 1974, the mechanical typewriter has had its place in the research program on Improvement in the Quality of Working Life (*Humanisierung der Arbeitswelt*) set up by the Federal Minister of Research and Technology (BMFT). A number of—for the most part ergonomic—investigations have been undertaken. They always centered on "optimizing energetic work" and, therefore, were only able to offer recommendations concerning different key and keyboard parameters—like measurements and surface design—as well as optical and acoustic signalling (see Menzel and Schilling 1920; IG Metall 1984; Rohmert and Haider 1982).

Concepts designed to minimize strain on body and health very soon became measures of a compensatory nature. They could not alter the character of the machine, which was determined by early but far-reaching constructive decisions. Investigations geared towards reducing stress on the body obviously paid too much respect to the "normative power" of the given technique and were guided by the widespread assumption that the realized technical solution must be the "correct solution." This assumption has since been subjected to vehement criticism, and has increasingly given way to the notion of technological development as a social process that needs to be reintegrated into its economic, political, and cultural context (Bijker et al. 1987; Weingart 1989). The following description of the history of the mechanical typewriter has been informed by this new perspective. It puts forward the thesis that technical appliances are "coined" early in their process of creation, certain attributes becoming irreversible. The generation of a new technology can be described as a process of closing and consolidation which is concluded in the definition of a "golden standard" (*Stand der Technik*).

In German law the term "Stand der Technik" serves as a reference point for the state-controlled regulation of technological practice. I use this term in a slightly different sense, however, to denote the dominant--and necessary--guidance for the generation of technological knowledge in the innovation process. The outcomes of technological practice demand for an absolute inherent consistency to fulfill the promise to realize a predictable procedure. Construction and development engineers, therefore, are in need of a stable fundament for planning and implementation.<sup>3</sup> They tend to minimize the risk of poorly developed modes of function through recourse to approved principles and elements that guarantee the degree of certainty necessary for complex constructive tasks. It is this particular feature of technical construction work that lends significance to the "Stand der Technik" and explains both the quest of technological practitioners for, and their readiness to agree on a "golden standard."

The establishment of a "golden standard" signifies that a new technique or artifact is socially and institutionally anchored and can itself be the point of departure for new developments. Above all, a "consensus of consolidation" needs to be initiated, promoted, and pushed forward in order to benefit from the emerging cognitive, social, and economic advantages of a "golden standard." Engineers, firms, research institutions, professional associations, and committees are involved in this process. A technical solution selected in this way is not necessarily the functionally "best" technique or the "best" appliance offering the greatest handling comfort. It is simply a construction for which a lasting "consensus of consolidation" has been achieved at an early stage of development and which embodies the most favourable cognitive, social, and economic conditions (see Knie 1991b).

#### TYPEWRITER DESIGN IN THE CONTEXT OF MASS PRODUCTION

During the 18th and 19th century a great number of models for the mechanization of writing were created all over the world, mostly by individual inventors with a great deal of imagination but only little mechanical competence. At the end of the 1860s a group of inventors in

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<sup>3</sup> This need has not, however, been sufficiently taken into consideration by new approaches to the social study of technology (Lohmann 1953/54: 601f.; Hellige 1984: 276f.; Pahl and Beitz 1986).

Milwaukee set out to find a construction for a typewriter. Testing various models they discarded those with more complex mechanical designs. The resultant model was a construction borrowed from the piano with a hammer mechanism and a bar for every single letter and symbol. During this "closing" process the group did not pay attention to qualities like originality or handling comfort. Instead, the focus was on finding a sturdy, less complex construction suitable for serial production.

The group contacted several companies but did not arouse much interest in spite of the group's industry-oriented ideas. Finally, in December 1872 "E. Remington & Sons"—a producer of agricultural machinery—responded. This well-established company was suffering from a drastic fall in the demand for weapons at the end of the civil war (1865) and was forced to find possibilities of diversification. "The search of diversity carried them into many curious corners of industry. They made everything from cotton gins to fire engines" (Hatch 1956: 68). The primary interest of the company was to fully utilize production capacities rather than to improve their new product. "Remington" carried out no market analysis, nor did they take the time to check on other systems for their suitability. Since the company's entry into the sewing-machine business had not been very successful they were now more concerned with limiting the risks of this undertaking. They managed to persuade the Milwaukee group to prefinance production to the tune of \$ 10.000 and to organize distribution of the machines. The head of the sewing-machine department, a man "who could not get away from environmental influence, and made his product look like a sewing-machine" (Hatch 1956: 151), was in charge of further development which aimed at quickly securing the constructive stability of the former basic construction. This resulted in mostly minor improvements, largely by using metal as a new material. Thus constructive decisions made in Milwaukee were taken over, fixed, and socially "hardened".

The first series of industrially produced typewriters, offered for sale in April 1874, did not provoke much enthusiasm among potential customers. Despite the high price of \$ 125 per piece these first series machines were still not at all satisfactory when it came to comfort or reliability. Machines of this type could only print capital letters. In addition they could not consistently produce straight lines and were noisy. The keyboard—originally arranged in alphabetic order—had now to be altered because letters that were frequently used kept getting stuck. This constructive defect was eliminated through a new arrangement—the QWERTY keyboard which still serves as a standard for today's PCs (David 1985: 332f.).

Since the new product did not sell very well little further attention was paid to the production of typewriters. They remained the "unloved child" of the Remington company. Two years after entering the market, the small typewriter-production department with its thirty employees had produced only 550 machines. When the financial situation of Remington became ever more critical in the mid-1880s, the department was finally sold. Wyckhoff, Seamens & Benedict, the company of a former employee, acquired, at a price of \$ 197.000, the new owner of equipment, stock and exclusive rights. Under a new name—"Remington Typewriter Company"—they took over production and distribution of the machines (Hoke 1984: 220; Current 1954: 111; Hatch 1956: 175; Pirker 1962: 33).

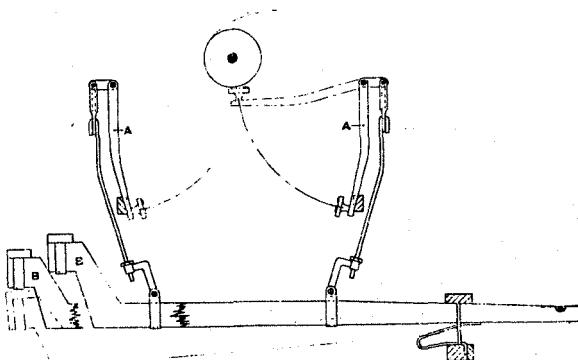


Figure 2. Remington

Very low sales and the harsh critique of customers again failed to induce technicians and construction engineers to question basic construction principles. The particular *Unteraufschlag* typebar technique (see Fig. 2) was not given up, "closing" decisions were not revised. Manufacturers had obviously reached a stage of knowledge that enabled them to operate on a well-structured technical basis and they therefore avoided any far-reaching, costly changes to the basic construction. Not until the late 1880s did sales increase thanks to an extensive advertisement campaign.

Soon other inventors who had previously produced typewriters in their homes were now offering their products on a new market expected

to expand by the optimistic voice of the trade press. Mostly equipped with a precision-mechanics shop, several small companies were set up by amateur inventors in cooperation with a sponsor. Independent of the "Remington technique" they tried to realize very different basic construction systems. Despite the fact that they were ten years behind Remington in manufacturing technique, the "Hall" model, a singlebar machine for domestic use with a few more intermediate steps in handling, could be produced at a low price and in a sturdy quality.

The models "Crandall" (Fig. 3a) and "Hammond" (Fig. 3b) were the first machines to appear on the market that featured the ingenious type-wheel or typecylinder techniques. This feature provided added comfort in writing but this was not enough to make up for mechanical deficiencies such as the irregular typeface after a few months in operation. These machines that had been developed along new paths of construction without relying on the consolidated typebar technique or production routines, did not reach the same popularity among customers as did a "Remington" or "Calligraph" machine with their mature, but far from optimal system of construction.

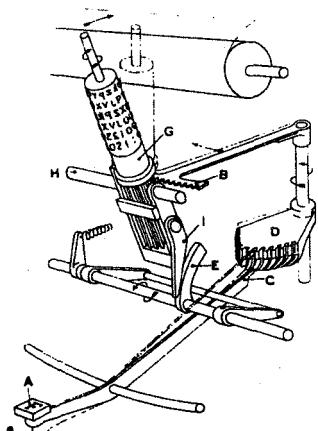


Figure 3a. "Crandell"

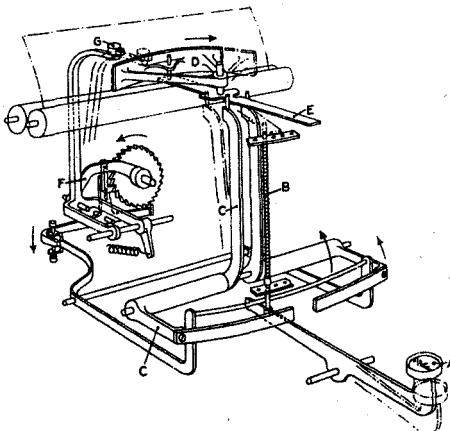


Figure 3b. "Hammond"

By this time the person buying and the person using a typewriter were often not one and the same (Specht 1896: 270; Hoffmann 1985: 131). We can safely assume that an office manager would always prefer one of the sturdy, lasting typewriters instead of the ones that were more comfortable to use but always in danger of breaking down and in need of

repair. The "Ideal" keyboard which would have represented an alternative and improvement to the complicated "Remington" keyboard appeared on the market too late to meet acceptance. On a convention in 1888 typists decided to stick to the "Remington" keyboard in order to avoid experiments and possibly having to adapt to changing arrangements of the bars. In any case, the "Ideal" keyboard soon disappeared from the market and was replaced by the "Remington" keyboard, named "Universal" (Pfeiffer 1923: 123; Martin 1981: 516).

Although the standard set by Remington in the 1880s remained unchallenged for about ten years and was itself the reference point for further development, it can still not be considered a "golden standard" for typewriters. Various other basic systems were still being promoted on the market. There existed no understanding among manufacturers and users about how to relate which system to which segment of the market and there was also no authority, going beyond the single institutional context, laying down rules and regulations or organizing training in order to structure and formally establish the hitherto existing pool of knowledge.

## THE ECONOMIC AND TECHNICAL CONSOLIDATION OF THE TYPEWRITER INDUSTRY

The wide variety of technical systems and manufacturing and distribution firms did not run parallel to an increasing demand for typewriters. This led to overproduction, provoking a drastic decline in prices followed by a "war between companies" (Pirker 1962: 36). First initiatives to introduce an entrepreneurial and technical consolidation were taken at the end of 1892. This rigid framework was to induce an even more rigid process of constructive "closing". All the larger typewriter companies, all manufacturers of typebar machines, merged in 1893 in the "Union of Typewriter Company of America." What is remarkable about this trust of the still new typewriter industry is not so much that it tried to stabilize prizes, but that out of it came the "Standard Remington" as an industry-wide and "golden standard." The economic power concentrated in the trust was able to present this typewriter as the universal construction system. This standard was guarded and secured so that there was no chance for suggestions and contributions by the still considerable number of independent technicians and engineers to be heard. Companies outside the trust could not successfully compete on the market, because

they lacked the necessary economic resources and could not rely on the same consolidated level of knowledge. The trust rejected contributions to solve the noise problem in favour of investment in a joint production plant, which was supposed to reduce production costs (Beeching 1974: 14; Martin 1981: 466).

When the "birth-defect" of the typebar-technique—the type printed on the bottom of the plate was not visible for the operator—was solved through the ingenious front-strike technique (see Fig. 4), it finally became the worldwide dominant system (Morschheuser et al. 1987: 183f.). This improvement, which could only be achieved through an extended mechanical interlinking, made the machine harder to handle because more force needed to be applied for operation, but it did offer an increase in typing speeds (Pfeiffer 1921: 183f.).

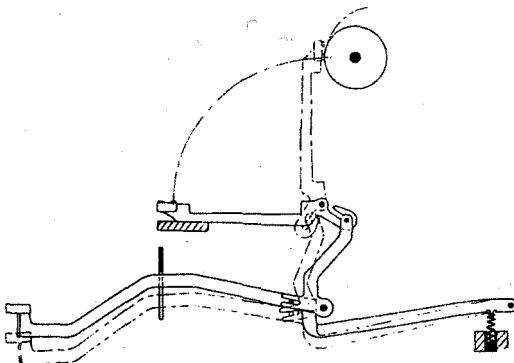


Figure 4. Wagner/Underwood

The case of the Royal Typewriter Company founded in 1904 illustrates how far-reaching the acceptance of this "golden standard" for typewriters—the first series was offered by the Underwood company—had been within the trade. E. B. Hess, a former tradesman in textiles with a technical inclination and owner of a small shop, "was not an engineer, and some of his favorite ideas were enough to drive engineers mad, but he was fortunate in having as a colleague, a small, quiet, disciplined, conservative technician, Lewis C. Meyers" (Bliven 1954: 90). Soon W. C. Ryan, a famous millionaire, broker, and sponsor of other daring industrial projects joined the group and enabled the small company to start without financial worries. Hess and Meyers identified considerable con-

structive deficiencies in the standard typewriter: In spite of segment shift control the typeface remained unstable and the visibility of the printed letters was still hampered by bows, strips, and springs. Overall the machine appeared to be unnecessarily complicated, thus raising the costs of manufacture and repair. The greatest criticism however was still the heavy strike. During a day's work on a modern typewriter a typist had to expend a considerable amount of energy (Bundesanstalt für Arbeitsschutz 1986: 18). Despite this critical analysis the conclusions drawn by the company were quite moderate. They did not follow the example given by alternative modes of construction like the typecylinder and typeball machines, but instead they accepted the typebar system as the basic construction.

The process of consolidation was continued, although the operation of this particular machine had proved to be quite uncomfortable. This financially secure company did not search for technical concepts to satisfy particular needs, but they searched for a way to make a stage of knowledge adaptable to higher demands. The new product, a machine that came out much flatter and appears modern by today's standard, was equipped with the typebar and front-strike systems and a new mechanism to accelerate movement of the bars, allowing a somewhat lighter strike. By relying on technical elements of the "golden standard", which had already been labeled as fail-safe, the Royal Typewriter Company managed to grow into the leading manufacturer of typewriters next to the Underwood company.

Developing modes of construction off the "beaten path" apparently meant taking too much of a risk, even as early as a few years after the turn of the century. By this time the unification of the trade had occurred to an extent that even suppliers had adjusted their products accordingly. The technical skills and knowledge of the qualified technicians and engineers hired by the Royal Typewriter Company represented the "golden standard" as well. Their interest in unconventional solutions was undoubtedly limited (Bliven 1954: 92f). A formally established and institutionalized group for technicians, possibly developing their own ideas concerning a technical standard independent of the industry did not exist at this point. It was not until much later that the scientific attention paid to technical construction in general was brought to the construction of typewriters. In Germany, for example, the first lectures on precision mechanics were held in a technical college in 1828 (Petzold 1985: 172). It was considered "beneath an engineer's dignity" (Reindl 1930: 157) to show a professional interest in sewing-machines and typewriters.

Reconsidering this short survey on the history of the typewriter, one fact, in particular, seems noteworthy: in the initial phase of industrial development a diversity of constructions to mechanize writing can be observed. This diversity soon disappears giving room to a long lasting and stable phase of standardization. The applications of the typewriter followed the opposite trend. In the early days, the intended purposes and application areas of the typewriter were far from being clear and it proved difficult to open up a market. Later on—after the transition to a modern office organization—the typewriter had established itself in all public and private areas of word-processing. The wide range of application of the typewriter together with particular needs of different user groups was not met by a constructive diversity in typewriter design.

By the end of World War I only one basic system of construction for typewriters remained. Mechanical stability of these machines had been achieved and secured during the trade-wide process of closing and consolidation, but only at the expense of constructive diversity. Yet manufacturers have always showed interest in integrating the needs and wishes of users when developing new models. Claims such as "designed to fit your needs 100%" (Schmitt 1937: 40) were made, but a closer look reveals that these offers were limited to marginal aspects such as additional symbols, one- or multicoloured ribbons, or number of copies.

The early phase of industrial development already shows that companies were primarily interested in securing the mechanical system and only secondly in criteria defined by the users' needs. The later phases show that new manufacturers entering the market adapted previously tested, basic constructions to their needs, instead of taking risks with a completely new development. The formation, acceptance, and securing of a "golden standard" was the more attractive the more companies could be bound to it. The process of unification was settled fairly quickly because industry's interest in the typewriter was only limited, being based on short-sighted considerations of diversification. Yet, these companies—through the typebar machine—managed to bring about a technical reality that other companies set up exclusively for the purpose of developing and manufacturing typewriters would not venture to ignore, the less so since they wanted their machines to be competitive at the price level. It was too late for entrepreneurial or constructive creativity at a time when the typebar technique had become a trade-wide technical standard that, for its fixed rules of construction and favourable

conditions for production, represented cognitive, social, and economic advantages. The selection patterns invisibly embedded in the typebar design were perpetuated and applied also to new tasks confining the generation of technical knowledge to a very narrow framework.

The creation phase, thus, is of special importance in the overall process of technological development. The specific economic, technical, and political conditions of this phase, once incorporated in a "golden standard", incessantly shape technology—possibly beyond their "expiry date". As can be seen from the case of the QWERTY keyboard, a "golden standard" can act as stabilizing force comparable to institutions. The QWERTY keyboard is still featured on modern PCs tormenting today's users. Although the technical preconditions of this type of keyboard arrangement became irrelevant a long time ago, alternative options that have been given up in the process of consolidation and closure cannot be taken up again at will when the economic and technological circumstances have changed. The risk of breaking up the established technical configuration of the typewriter prevented constructive efforts beyond the correction of minor details. Attempts to introduce an "ideally" arranged keyboard were doomed to failure, just as endeavours to provide the typebar construction with a lighter strike or to abolish its hammering sound never materialized. Other systems than the typebar design—swept away early by the constituting forces of a "golden standard"—would have offered better opportunities for such improvements.

Hence, the idea of technological progress should not be governed by the assumption that a long phase of technical development and market selection assure a perfect outcome for users. Instead, technological development is largely dominated by the "internal" needs of clear and systematic structures that enable the creation of stable modes of functioning in a narrowly "technical" sense and meet user's needs only secondarily. In this way, yesterday's decisions determine tomorrow's options.

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