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## The long arm of the law: London's law firms in a globalising world economy

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J V Beaverstock, P J Taylor

Department of Geography, Loughborough University, Loughborough LE11 3TU, England;  
e-mail: J.V.Beaverstock@lboro.ac.uk; P.J.Taylor@lboro.ac.uk

R G Smith

Department of Geography, Leicester University, University Road, Leicester LE1 7RH, England;  
e-mail: rgs10@le.ac.uk

Received 29 April 1998; in revised form 1 December 1998

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**Abstract.** The 'geography of law' is an emerging subdiscipline within human geography. However, the 'geography of law firms' and their functional capabilities remains strangely neglected in both producer-service and world-city literatures. In this paper we begin to address these gaps by investigating the importance of London in the globalisation of law and the uneven nature of that globalisation. We focus upon why, how, and where leading London law firms are developing world-city office networks.

"Ten years on we believe the key players will have substantial presences in ... Asia, Europe and the US. That will be the profile of the successful global law firms."

Keith Clark, Senior Partner, Clifford Chance (quoted by Rice, 1997, page 17).

"Most of Freshfields investment is in building an international firm, believing this is what business clients will want in the years ahead."

Anthony Salz, Senior Partner, Freshfields (Salz, 1997, page 1).

### Introduction

According to Peter Daniels (1993, page 1), the study of law has "long been the Cinderella" of producer-service and world-city research<sup>(1)</sup>. Despite some notable contributions (Blomley, 1987; Blomley and Clark, 1990; Clark, 1989a; 1989b; Daniels, 1993; Lynch and Meyer, 1992; Warf and Wije, 1991), we concur with Daniels's assessment. Although there has been a myriad of academic studies focused on the internationalisation of producer services (such as Bagchi-Sen and Sen, 1997; Daniels, 1991; Enderwick, 1989; Goe, 1991; Marshall et al, 1988; Moulaert and Daniels, 1991; United Nations Center for Transnational Corporations, 1988; Warf, 1991), within this rich corpus of work the major interest has been on those advanced producer services associated with business and finance. Notable examples include: accountancy (Beaverstock, 1996; Daniels et al, 1989), advertising (Leslie, 1995; Perry, 1990), banking (Daniels, 1986; Thrift and Leyshon, 1988), business services (O'Farrell and Wood, 1998; Wood, 1991), consultancy (Daniels et al, 1992), financial services (Gentle, 1993), and real estate (Thrift, 1987). In this paper it will become clear that legal firms have also been subject to similar globalising pressures and have responded with global strategies on a par with other producer services (see, for example, Delazay and Sugarman, 1995).

In this paper, we focus on London law firms as major players in the globalisation of law. London's law firms are alive to, and are responding to, the needs and demands of globalisation by increasing their presence in other world cities. For a leading London lawyer, "globalization is a reality and the increasing links between Asia, Europe and

<sup>(1)</sup> In 1991 Daniels (page 359) argued that service industries in general had "long been the Cinderella of economic and urban geography".

the US will be the fundamental phenomenon of the next decade" (Keith Clark, quoted by Rice, 1997, page 19). There are several reasons for London's prime position in this service sector. First, London's law firms had a competitive advantage in the globalisation of law services as a result of the legacy of the British Empire, which installed English legal systems around the globe. In fact, historically, London law firms have operated globally by drawing up the governing contracts for the British financiers who underwrote international projects throughout the world in the nineteenth century. Today this practice continues as much of London law firms' international business concerns financial arrangements for project finance. The other main practice areas with a global scope are privatisations, which have increased in number in recent years as more countries participate in the international financial system, and mergers and acquisitions work which tends to be, but is not exclusively, in the mature economies of Europe and the USA. Second, London remains the dominant financial centre in its time zone (and even in the world since the 1970s) which provides law firms there with numerous agglomeration advantages (proximity aids the close client relationships between English law firms and banks for example, and it is international financial and banking work which has helped drive the global expansion of many London firms) over other firms, in other European cities in particular (see McGrath, 1994, pages 24–25). Third, London's geographical location and transport links are a distinct advantage, as they facilitate easy access to the USA, Europe, and Asia. Fourth, there are less intangible factors which provide a particularly conducive locale for globalisation projects such as lack of regulation, the fact that English is the global language of business, and the so-called lifestyle factor<sup>(2)</sup>, the attractiveness of London for those who practice globalisation. In summary, London is an obvious case study for investigating contemporary globalising tendencies in the provision of legal services.

Mirroring their clients' interests, London law firms are transcending geographic boundaries and time zones through overseas offices, affiliations, associations, and telecommunication technologies. We analyse this activity by focusing, first, on law as a producer service and, second, on London as a world city. Although relationships between producer-service and world-city literatures are commonly invoked, we aspire in this paper to integrate them more fully than hitherto. In the first part, we investigate why and how London law firms are globalising by outlining the reasons driving the globalisation of law, and by describing the practices adopted by some of London's top thirty law firms to increase their global presence. In the second part, we present and analyse data to show how London's law firms fare collectively in the key globalising arenas of the world economy. This involves analysing both the geography of London law firms' overseas branch offices and the world-city origins of foreign law firms with branches in London. To put the London case in comparative perspective, we also look briefly at the geography of the overseas branch offices of law firms based in New York because this city dominates the USA for the provision of legal services accounting for one-third of the largest 100 US legal firms (Warf, 1991). The final product is a text which makes a distinct contribution to the producer-service literature in terms of one particularly neglected service and which also provides insights into London's role as a world city in contemporary globalisation.

<sup>(2)</sup> Healey & Baker's "European cities monitor: Europe's top cities" (1997 edition), which interviews senior executives from more than 500 European companies for their attitudes towards Europe's leading business locations, found that London is considered to be the fourth best city in terms of the quality of life for employees (behind Barcelona, Paris, and Geneva). Furthermore, according to a ranking by Geoffrey Precourt and Anne Faircloth in *Fortune* (1996), who created a list of the "Best cities for work and family", London is the second best international (that is, non-US) city (behind Toronto and ahead of Singapore, Paris, and Hong Kong).

### The globalisation of the legal profession

Law, like other producer-service activities, has grown rapidly with the restructuring of the world economy over the last two decades. The speed of its globalisation was relatively slow until 1989 and the rapid globalisation of international finance, in particular securities markets (Daniels, 1993, page 55). Law firms began to open office networks in the major international financial centres as their expertise and knowledge were needed to advise upon corporate takeovers, privatisations, and property finance. Moreover, as other producer-service activities were expanding their corporate empires throughout Europe, North America, and East Asia, so in turn law firms internationalised specifically to serve their corporate clientele in situ. Thus, an important determinant factor accounting for the globalisation of law has been the need to provide transnational clients with knowledge and expertise through 'face-to-face' contact, and a professional service of the highest international reputation (Ascher, 1993; Labaton, 1988). This rationale partly underlies the practice of London law firms in recent years. We discuss this practice in two parts, first in terms of the specific reasons behind the decisions to go global, and second with regard to the different forms that global practice takes.

#### Globalisation drivers: London's law firms going global

The globalisation of law firms has been facilitated by a mixture of demand-side and supply-side factors (see Daniels, 1993). On the demand side, it has grown as primary, manufacturing, and other service firms of all sizes have externalised this specialised element of the production process outside of the organisation. Moreover, we would like to suggest that this growth has been intensified from the business linkages developed between the legal profession and other producer-service organisations, especially accountancy, banking, and other financial services (Coffey and Bailly, 1992; Daniels, 1993; Goe, 1990). In contrast, on the supply side, law firms have benefited from rapid improvements in information technology, telecommunications, and government regulation. Thus, law firms have been able to take advantage of these opportunities for growth to supply a professional service at local, regional, country, and global scales (Ascher, 1993).

If one looks at these factors in more detail, there have been several key reasons why London firms have taken the decision to increase their presence in foreign markets: client demand, spreading risks, competition, merger activity, technological advances, and European Union (EU) developments, especially European Monetary Union (EMU).<sup>(3)</sup> Each is considered in turn.

*Client base* The greater a firm's worldwide reach, the more credible it is to the increasing number of potential clients who want their needs met on a worldwide basis. Law is a service industry whose clients range in geographical scope. Clifford Chance has prioritised its clients according to three geographical scales: *global* multinationals (which includes governments and multilateral agencies); *regional* corporates whose activities are either confined to the national market of one of Clifford Chance's foreign offices or extend beyond that market to the region; and *domestic* firms whose activities are largely

<sup>(3)</sup> We do not purport that this list is exhaustive. Several other 'drivers' could also be included, such as the general worldwide deregulation and liberalisation of the trade in services which has encouraged the globalisation of not just law but business and professional services in general. Indeed, Trubek et al (1994, pages 409–410) lists several 'international forces' promoting the globalisation of law and the need for expertise in international law: changing production patterns (that is, flexibility and the 'global factory'); linked financial markets; the increased importance and power of 'footloose' multinational firms; the increased importance of international trade and the growth of regional trading blocs (EU, NAFTA, etc); structural adjustment and privatisation; the hegemony of neoliberal concepts of economic relations promoted by the IMF, the World Bank, and GATT; a worldwide trend towards democratisation, protection of human rights, and renewed interest in 'the rule of law', and the emergence of supranational and transnational actors promoting human rights and democracy (also see Dicken, 1986).

restricted to the United Kingdom. The global client requires a global law firm with the capacity to provide a service which combines both international expertise and experience with local knowledge and cultural sensitivity. Hence, "from a management structure based largely on geography" Clifford Chance (1997a, page 8) is going global, and avoiding the risk of overspecialisation by geographical area by moving "towards a structure which places greater importance on the management of specific clients and products on an international basis across the firm".

*Organisation to reduce risk* The more global the law firm is, the better prepared it will be to survive economic fluctuations in both the United Kingdom and the world. Despite the increasing interdependence of the world's economies globalisation is still a way of spreading risk and grasping opportunities should business and/or uncertainty decline or grow in one (or several) market(s). Two examples illustrate this point. First, after Tiananmen Square several US law firms closed their offices in China, but reopened them in 1993 to service an influx of investment banks (Rice, 1998a). Second, the major financial crisis of 1997–98 in Pacific Asia will cause the market for some legal work there to shrink. Hence in Hong Kong inflexible international law offices (lacking variety in practice areas and clients) are facing an uncertain future, but globalising law firms will be vulnerable only in terms of the relative importance of this regional practice to their overall business.

*Competitive forces* The aim to be a global law firm, although perhaps driven by a fear of being left behind, provides a clear vision for future growth and development. For example, Clifford Chance's (1997a) mission statement entitled "A vision for the future" clearly states the firm's ten-year plan to move on from being "the leading European-based international law firm" to be "the world's premier law firm" (see also Daniels, 1993, pages 56–57). Thus the ambition is to overtake the US giant Baker & McKenzie which was ranked first in the 1998 list from the *International Financial Law Review* of the world's largest law firms. Clifford Chance is currently in second place ahead of Jones Day, Reavis & Pogue (the second largest US law firm).

*Merger activity and accountancy firms* As well as competition from the expansion of US law firms, the globalisation of London law firms is being driven by competition both from European law firms who are strengthening through mergers and alliances, and from above all major accountancy firms who are adding legal services to their repertoire of professional services as part of their globalising strategies (see Trubek et al, 1994, pages 434–435). Three of the accountancy giants Price Waterhouse, Coopers & Lybrand,<sup>(4)</sup> and Arthur Andersen have been busy building their legal networks through establishing and acquiring regional and national law firms in a determined attempt to capture a significant share of a market hitherto reserved for London's law firms. However, because the Law Society (the regulator) prohibits multidiscipline practices this has had to be achieved in the United Kingdom through 'sponsoring' an independent law firm. PW's 'sponsors' the law firm Arnheim & Co., which, as a consequence, is expected to grow dramatically in the next few years from twenty lawyers presently to circa 300 (Darnill, 1997, page 40). Following Price Waterhouse and Arthur Andersen (who sponsors Garretts), Coopers & Lybrand opened the associated UK legal practice

<sup>(4)</sup> On 1 July 1998 Price Waterhouse and Coopers & Lybrand merged to form Pricewaterhouse-Coopers. This reduction of the 'Big Six' to the 'Big Five' continues the historical trend of increasing concentration in this sector. The concentration follows Marx's observation that there is a trend toward monopoly or oligopoly in capitalism. At the time of writing the rumour circulating the City was that in the future a merger between Deloitte Touche Tohmatsu International and Arthur Andersen was likely (personal source). However, one has to remember that in 1989 (see Waller, 1989) the attempt by Price Waterhouse and Arthur Andersen "to merge into the largest accounting firm in the world with 4,642 partners and annual revenues of \$5,038 billion failed because of conflicts of interest over clients and, especially important, cultural differences in organization" (Flood, 1995, page 157).

Tite & Lewis in May 1997, and Ernst & Young and KPMG are also planning to open, or link to, associated legal practices in the United Kingdom. Arthur Andersen is now the fastest growing UK law firm and is establishing a presence in several European countries such as Spain, where it recently took over the top Madrid-based law firm J&A Garrigues (Anon, 1996, page 112). The aim of these accountancy firms is to become all-in-one global professional one-stop-shop firms servicing international clients for everything from accountancy to management consultancy and legal advice. Their threat to law firms is considerable because they have stronger capital and client bases combined with better geographical presence.

The competition between London and New York law firms and the increasing threat of the big accountancy firms has led to speculation about transatlantic mergers. An indicator of the increasing competition between UK and US firms has been the increasing globalisation of the legal labour market as firms fight to secure the expertise of top lawyers in order to usurp their competitors. One example is given in *The Economist* (Anon, 1996, page 109) which notes that "four senior British solicitors, specialists in project finance" were hired as partners by Shearman & Sterling (the fourth largest New York law firm as ranked by the *New York Law Journal*, 30 September 1997) in order to bolster its London office through offering expertise in English law. Another recent example was the recruitment by Clifford Chance of a senior US lawyer from Sullivan & Cromwell (the eighth largest New York law firm) to enhance its rapidly developing US securities law capability. The appointment was the seventh US securities lawyer to join Clifford Chance's London office adding to the firm's global US law capability of over forty US lawyers in New York, London, and Hong Kong (Clifford Chance, 1997b).

*Technological advances* Technological advances in new methods of communication have aided and allowed the globalisation (integration of offices, practices, and people firmwide) of law services. Firms have developed intranets as an internal notice board, to facilitate rapid desktop delivery of information to fee-earners and the firm worldwide and as an efficient means to deliver services and information to closed groups of customers. Furthermore, they have also taken advantage of the latest technology to service their clients better and to attract business. For example, Allen & Overy (1996) have added (despite issues about security and reliability of delivery) electronic mail, electronic document transfer, internet web pages, and videoconferencing services to their 24-hour telephone (switchboard and direct dial numbers), voice-mail, telephone conferencing, fax, and DX (document exchange scheme) services. When doing business in the Asia Pacific some of the new technologies are an added aid because they can provide cultural sensitivity by acting as a 'buffer'—providing time for reflection and understanding before responding, and so saving 'face'.

*Europe and EMU* EMU, along with global restructuring in general, is driving the globalisation of law with UK and US law firms extending and expanding their presence in the EU. This tendency has speeded up in recent years with Allen & Overy and Simmons & Simmons merging in 1997 with Italian firms Borsio Casati of Rome and Grippo e Associati of Milan, respectively (also see Flood, 1995, page 155). In 1998 Freshfields announced that it is building up its presence in Frankfurt by merging with Deringer Tessin Herrmann & Sedemund, one of the city's leading legal practices whose major clients include the German government's EU department. With Allen & Overy also seeking a merger in Germany to expand its Frankfurt office, these firms are just the crest of a wave of international law and accountancy firms who are contemplating expanding in and into Germany in preparation for EMU and the opening in Frankfurt of the European Central Bank in 1999. Firms are moving in for three main reasons: (1) To beat the competition—as Alan Peck (chief executive of Freshfields) observes, "To be a main player, you have to be in Germany as well as the other key cities. The

Americans see this logic, and are ready to pile in to Europe, so we have to get there first" (see Rice, 1998b). (2) To profit from the lucrative German legal-services market through the advantage of being a global firm. One of the main reasons Deringer is merging is because of Freshfields extensive global presence. The restructuring of Germany's legal services industry is necessary because of the need to not only satisfy the clients' need for international advice, but also to improve the international competitiveness of German firms. German companies have, as Frank Montag (a Deringer partner) says, "gone a long way to becoming international operations", consequently "their legal advisers have to go the same route" (quoted in Yuille, 1998, page 20). (3) After a wave of domestic mergers following liberalisation 8 years ago, Germany's firms have become more receptive to international mergers and alliances because of their need to follow the example of Germany's accountancy firms and investment banks who have globalised to service their clients.

In summary, although this list of globalisation drivers is not exhaustive, many of them are common to the globalisation of advanced producer services in general. The legal profession has, therefore, been responding to supply and demand forces which reward firms that 'go global'. However, the manner in which this globalisation occurs, the 'global practice', is particular to law as a producer service.

#### Forms of global practice by London law firms

All but the last of London's top thirty law firms have a 'global presence' (table 1) of some description. The firms follow either a strategy of *direct presence* (through opening overseas offices), a strategy of *indirect presence* (through negotiating affiliations and/or associations with foreign firms), or a combination of both. In addition some firms may use ad hoc arrangements to service their clients in smaller foreign national markets.<sup>(5)</sup> These forms of global practice will be considered in turn.

*Direct presence* All but one of London's top thirty law firms have overseas offices which afford them a direct presence in a foreign jurisdiction (table 1). We will illustrate this form of global practice by focusing on Freshfields, one of the law firms which relies solely on this strategy.

Freshfields has been established for over 250 years, is the fourth largest London law firm, and is the principal lawyer to the Bank of England and Lloyd's of London (the proposed merger with Deringer would move Freshfields up the rankings, but it would still be second to Clifford Chance). The firm has followed a strategy of direct rather than indirect presence to increase its geographical scope. Consequently, the firm has no associations or affiliations with firms which have a long-established presence in foreign markets, but does have sixteen overseas offices covering a number of jurisdictions (figure 1, see over). Freshfields has grown and extended its direct presence through the 1970s, 1980s, and 1990s. However, the pace has dramatically quickened with demand in the late 1980s and 1990s, with a new overseas office being opened virtually every year (out of circa 1800 people in the firm in 1996–97, 600 work in offices other than London).<sup>(6)</sup>

<sup>(5)</sup> Our schema adds to the four major ways law firms operate outside of their national boundaries as identified by Ascher (1993): first, as independent transnational corporations, such as, Clifford Chance and Freshfields (Daniels, 1993; Rice, 1990); second, through partnership arrangements with other (host-based) law firms such as Baden Oppenhoff (see Anon, 1998); third, through partnerships with non-host-based law firms; and, fourth, through loosely structured arrangements within ad hoc networks (Aharoni, 1993). This schema does not include the role of international mergers or multinational partnerships as mechanisms to increase global presence (see Zach, 1995).

<sup>(6)</sup> From May 1987 to May 1997 the number of partners has increased from 61 to 185, lawyers (including partners) from 265 to 701, trainees and paralegals from 66 to 227, total fee-earners from 331 to 928, partners resident outside the United Kingdom from 12 to 57, lawyers resident outside the United Kingdom (including partners) from 39 to 261, support staff from 364 to 843, and offices from 5 to 16 (Freshfields, 1997, page 5).

**Table 1.** The top thirty London law firms [source: based on (for Partner and Assistant Solicitor numbers only) *A Guide to the Legal Profession, 1996–1997* (Chamber & Partners' Directory, 1997), page 11].

Rank	Firm	Partners	Assistant Solicitors	Number of overseas offices	Indirect presence
1	Clifford Chance	171	537	23	no
2	Linklaters & Paines	144	396	10	no
3	Allen & Overy	115	307	18	yes
4	Freshfields	117	304	16	no
5	Lovell White Durrant	112	234	10	yes
6	Simmons & Simmons	118	226	8	yes
7	Ashurst Morris Crisp	73	260	5	no
8	Slaughter & May	88	315	5	no
9	Herbert Smith	112	214	5	no
10	Norton Rose	89	212	7	no
11	Nabarro Nathanson	102	164	3	yes
12	Denton Hall	77	136	7	yes
13	Wilde Sapte	65	130	5	no
14	Cameron Markby Hewitt	70	111	9	yes
15	McKenna & Co.	69	110	na	na
16	Baker & McKenzie (USA)	50	127	54	no
17	Taylor Joynson Garrett	70	98	2	yes
18	Rowe & Maw	67	86	1	yes
19	Stephenson Harwood	55	94	7	yes
20	Berwin Leighton	62	84	1	no
21	Barlow Lyde & Gilbert	58	86	1	yes
22	S J Berwin & Co.	52	89	1	yes
23	Eversheds	60	76	2	no
24	Richards Butler	60	71	9	yes
25	Theodore Goddard	50	72	1	yes
26	Clyde & Co.	59	62	5	yes
27	Macfarlanes	45	74	1	yes
28	Lawrence Graham	60	58	1	yes
29	Masons	44	72	4	yes
30	Travers Smith Braithwaite	43	71	0	no

Note: na; not available.

The firm's first overseas office was opened in Paris (1972), followed by New York (1977), Singapore (1980), Hong Kong (1985), Tokyo (1988), Brussels (1989), Frankfurt (1990), Madrid (1991), Moscow (1992), Bangkok (1994), Barcelona (1994), Hanoi (1994), Ho Chi Minh City (1995), Beijing (1996), Milan (1997), and Rome (1998). The firm's presence has clearly spread widely across both Europe and Asia. However, only one office has been established in the USA so far, perhaps owing to the intensity of indigenous competition there.

Alan Peck, the Chief Executive of Freshfields, argues that a global strategy of direct presence is advantageous over indirect because it enables a firm to provide a standardised and consistent quality of service across the globe (Peck, 1997, page 28). Anthony Salz (Senior Partner at Freshfields) argues that although there are considerable direct (staffing and office expenses) and opportunity costs (sending away good lawyers) in establishing a network of overseas offices it is necessary to be truly international: "I believe a firm must succeed in establishing a perspective across a number of countries with different cultures, different laws, and different approaches—and not simply a view of the world from head office" (1997, page 3). The basic argument from Freshfields is that an indirect presence of affiliations and associations is not as effective as a direct

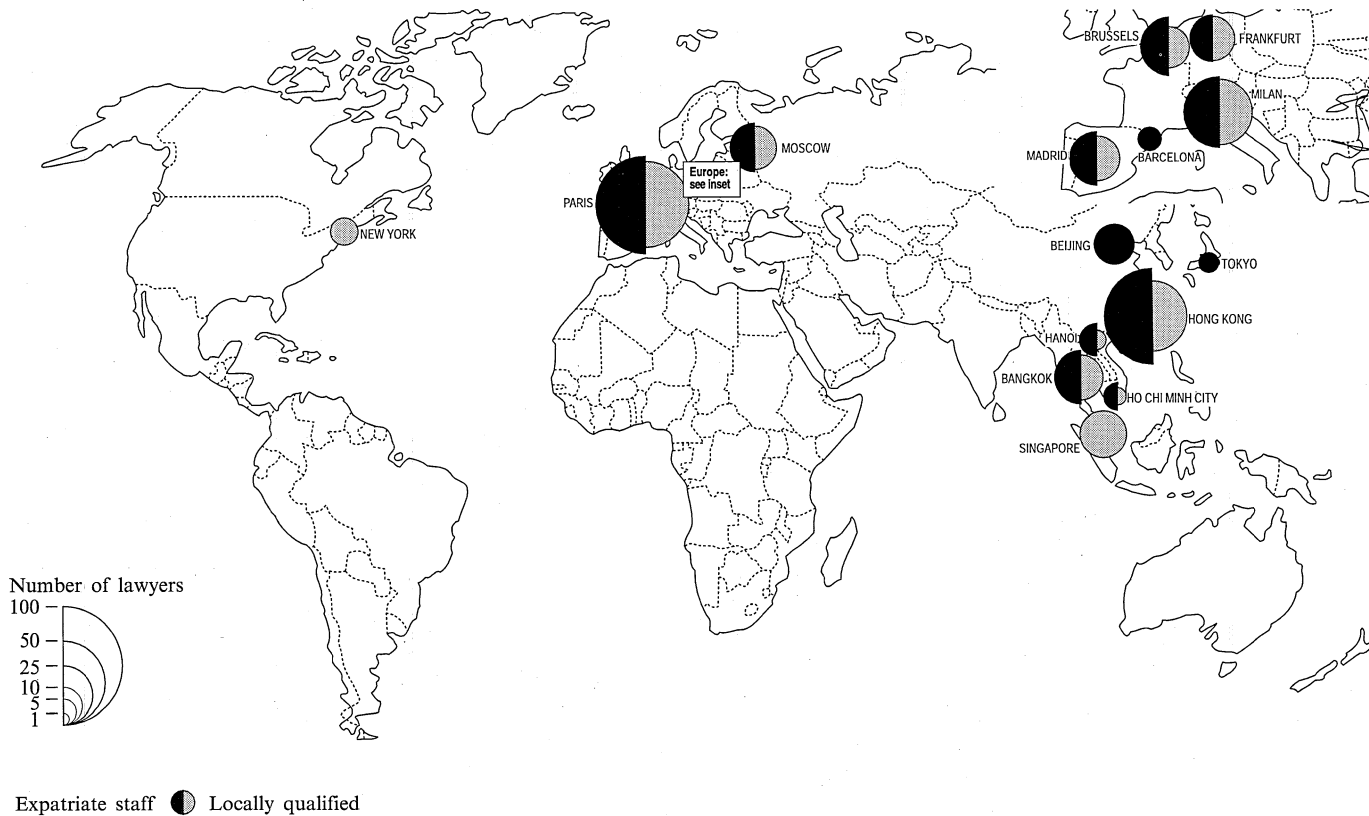


Figure 1. The 'direct presence' of Freshfields (source: Freshfields, 1997).



presence in providing the local capabilities and knowledge necessary (along with the depth and diversity of the firm's experience across the world) to service a client's needs. Hence, Freshfields overseas offices are staffed both by local lawyers and by lawyers from other jurisdictions (for example, their Hong Kong office has sixty-six lawyers, thirty six of whom are locally qualified), which enables them to provide international experience with local knowledge (Chambers & Partners Directory, 1997, page 850).

In the case of project finance, for example, the overarching contract law (which will be in English or New York law and encompasses companies and banks from several countries) has to be squared with the local law system (which encompasses the local construction companies who build the actual project). This requires political and cultural sensitivity (especially in Asia) to local conditions as well as "the patience necessary to reassure governments and companies unfamiliar with Western lawyers" (Peck, 1997, page 28). In short, overseas expansion through branch offices is not a case of planting flags around the world. Although the branch office extends the law firms' global reach it is important that it is not an alien implant but is attuned to local conditions. Hence, as figure 1 shows, the branch offices at Freshfields are not just occupied by 'parachute lawyers' from head office, but are staffed by a mixture of locally qualified and expatriate lawyers, with the proportion of the former rising as the branch establishes itself. As law firms become more and more global the total number of expatriates should also fall to be replaced by local partners who can combine strength of local knowledge with global reach.

*Indirect presence* London law firms extend their global reach through an indirect presence which can take the form of either an affiliation with foreign firms (partnership or joint venture) or membership of an association (a looser organisational arrangement). In this more complex pattern of strategies we use four law firms to illustrate forms of globalising. As mentioned previously, most indirect strategies are combined with direct presences. We begin with Lawrence Graham which, but for an office in Mariupol, relies solely upon an association. For the more usual combination of association with direct presence we discuss Taylor Joynson Garrett. For affiliations we consider Allen and Overy and Denton Hall, both of which combine direct and indirect presences as part of their overall strategy.

Lawrence Graham (ranked 28, see table 1) has a minimal direct presence, but does have an indirect European presence through its membership of the *Associated Business Lawyers of Europe* (ABLE) which was formed [with firms in Belgium (Brussels), France (Paris), Germany (Hamburg), Spain (Madrid), and Sweden (Stockholm)] to serve those clients expanding into Europe with legal services. What is interesting about associations such as this one is the role of culture, networks, and personal relationships in getting business done. Michael Richardson (1996, page 9) highlights the fragile and intangible nature of this approach to providing legal services abroad:

"Successful associations are not easy to build and require continuous work if they are to be more than correspondent relationships. Their success is dependent on the development of trust between the partners in both firms and among the professional staffs. Usually it is a relatively small number of partners in either firm who are the driving force in achieving the right relationship. Unless their enthusiasm permeates both firms the real benefits which can grow from a successful association will not be reaped."

Richardson also emphasises the need for regular face-to-face meetings, exchange between membership firms of expertise and staff, and the importance of joint initiatives in areas such as marketing for an association to work.

Taylor Joynson Garrett (ranked 17) is an example of a London law firm which follows a combination of both direct (with offices in Brussels and Bucharest) and indirect presence (having affiliations and being a member of an association) to form

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an international network. The firm is both a member of Interlex, a nonexclusive informal association (founded in 1973) of independent law firms in over twenty countries which work collectively to provide a complete range of international legal and business services to a variety of clients, and has international affiliations with several leading foreign law firms to form an international group of over 1200 lawyers and seventy-two offices (figure 2):

“The firms co-operate in representing clients with multinational business interests from all the main economic areas in the world. We recommend each other as counsel of choice although, naturally, clients can make their own selection if they prefer. There are frequent exchanges of personnel and a number of world-wide practice groups have been formed which meet regularly to discuss legal and business developments in the various jurisdictions ... . The affiliations give us the ability to provide our clients with a focused and consistent service, involving local lawyers with proven experience” (Taylor Joynson Garrett, 1997, page 3).

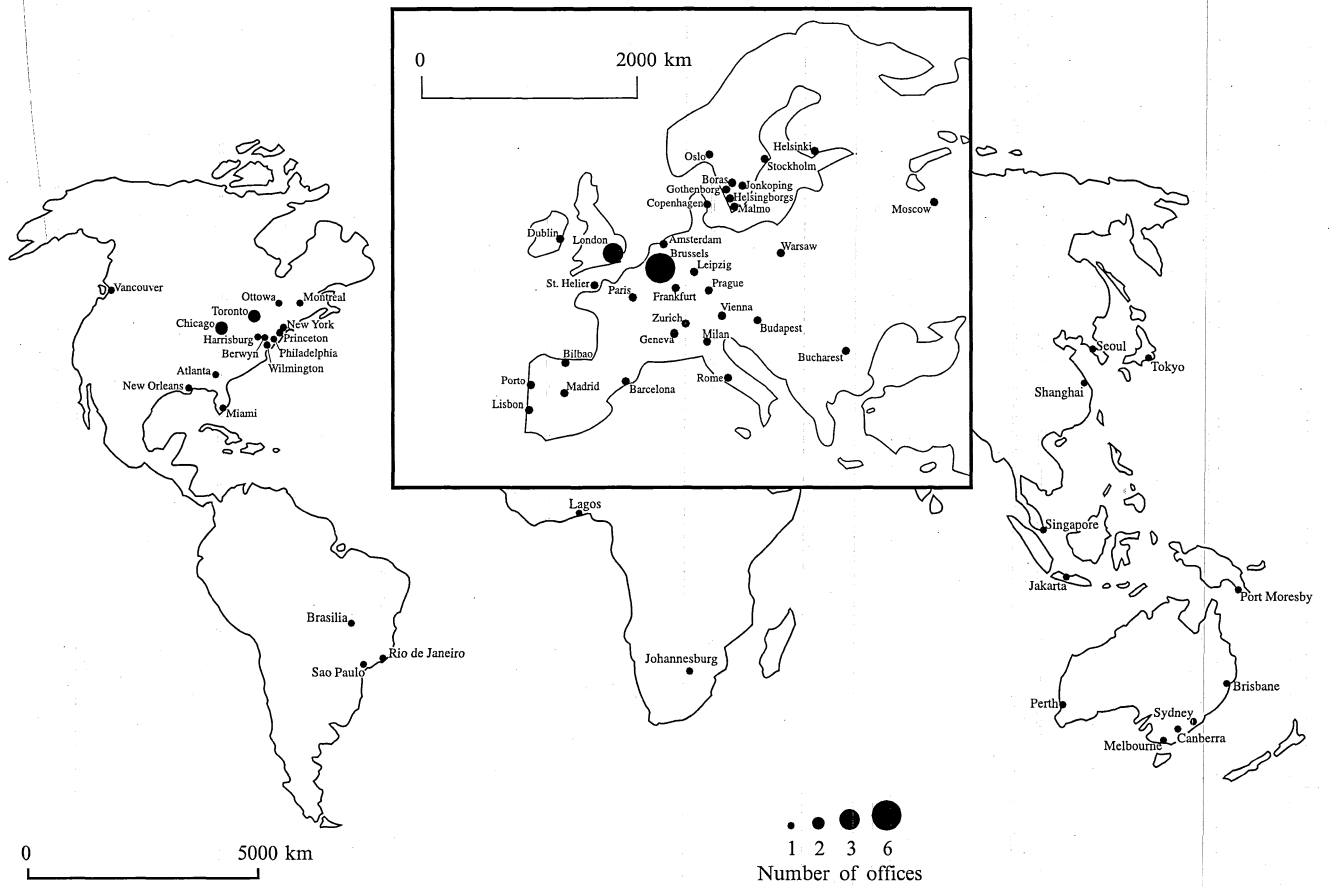
The firm, therefore, extends its geographical presence in North America (by working with the US firm Graham & James LLP which maintains a London office to coordinate its activities with Taylor Joynson Garrett and has domestic offices in Los Angeles, New York, San Francisco, and Washington), in the Far East and Australia (by working with Deacons Graham & James with offices in China, Japan, Hong Kong, and Thailand), and elsewhere with further representation through the network in Indonesia, Taiwan, and Vietnam, as well as Kuwait and Saudi Arabia in the Middle East, and in Europe the Czech Republic in addition to the Graham and James’ Italian office in Milan.

Allen & Overy (founded in 1930) is the third largest London law firm with an extensive network of eighteen overseas offices in Europe, Asia, and North America. However, complementing this, Allen & Overy also has a strategic affiliation (established in 1991) with the two leading continental firms Gide Loyrette Nouel in France and Loeffl Claeys Verbeke in the Benelux countries, which serves to further extend Allen & Overy’s global presence into two of Europe’s leading legal markets. The affiliation between these three international firms gives clients access to 1500 lawyers in forty-one offices, a third of which are located outside of Europe (Allen & Overy, 1997), and enables Allen & Overy (through integrated teams, joint practice groups, exchange lawyers, and joint presentations and papers) to provide a full range of legal services on cross-border transactions and international disputes by taking advantage of local law expertise

Denton Hall is the twelfth largest London-based law firm and also has a considerable direct presence (seven offices in three continents). However, this firm is also the founding member of an affiliation of leading European law practices (from Barcelona, Berlin, Chemnitz, Cologne, Copenhagen, Düsseldorf, Frankfurt, Hamburg, Madrid, Munich, Oslo, Paris, Vienna) called the Denton International Group of Law Firms which serves to increase Denton Hall’s European presence. Founded in 1991 and coordinated from London, the affiliation brings together firms, who remain autonomous and practice under their own names, to “work together on assignments for international clients from within and outside Europe, on cross-border transactions and on projects for international agencies” (Denton Hall, 1997, page 6).

*Ad hoc presence* In addition to these two dominant forms of presence there is another type which can be classified as ‘ad hoc presence’. This is where a firm does business in an overseas market but does not have a representative presence there. For example, the London law firm Freshfields works with local law firms in parts of the world where they do not have a direct presence: in India, Indonesia, the Philippines, and to a lesser extent throughout Central Europe and the Middle East.

In summary, direct and indirect presence are two ways of straddling the world to compete for legal work on a global scale. The fact that most firms combine these



**Figure 2.** The Interlex Group's office network (source: Interlex Group, 1998)

strategies suggests that neither has yet established itself as the dominant form of globalising. The jury is still out as to which is the most cost-effective way to achieve ones global ambitions, but given the fact that the balance towards direct presence seems to be greater among larger firms (table 1) we might expect this strategy to become more important in the future. It is certainly the case that both the direct costs (including IT, staff, training, extra management, and marketing) and opportunity costs (sending able expatriate lawyers away) of establishing a direct presence (global–local practices) are considerable as opposed to those of forming an association. However, the advantages (including the fact that clients are attracted by having the same standard of legal advice wherever they are and by geographical proximity which facilitates direct local access to their lawyers) of being directly present in foreign markets perhaps outweighs the cost. What is clear is that both means of establishing a presence must balance international expertise with local knowledge.

### **An analysis of London law firms in globalisation arenas<sup>(7)</sup>**

The cluster of contemporary processes which have come under the heading globalisation are very uneven in their geographical distribution: it has recently been described as “uneven in terms of cross-national intensity, geographical scope, and national and local depth” (Holm and Sorensen, 1995, page 1). Hence despite the sense of universality which the term evokes, in practice many globalisation processes have been concentrated in a few zones of the world economy, and largely bypassed many world regions. As will have been gathered from the last section, this is most certainly true of the global strategies of London law firms. In this section we specify this geographical unevenness through a series of simple data analyses which highlight what we call globalisation arenas—the concentrations of global law firm activities.

Our analyses are all based upon data describing the strategy of direct presence. Hence this analysis should be seen as partial, a picture of a particular globalisation based upon one form of strategy. Behind the direct presence of firms the importance of indirect presence in the globalisation of law should not be undervalued. Affiliations, associations, personal contacts, and networks are vital to the business of many of London’s law firms across Asia, Europe, and the USA. However, it is important to realise that as direct presence does usually involve a greater commitment of resources than other strategies, by focusing on the presence of branch offices we identify those cities in world regions where the workload can justify such an outlay. It is the geography of these branch offices, therefore, which illustrates most clearly the uneven development of globalisation.<sup>(8)</sup>

<sup>(7)</sup> David Trubek et al (1994) point to the creation of transnational arenas for legal practice in their study of law and global restructuring. However, they do not substantially elaborate on this beyond stating that, “The relative degree of ‘internationalization’ of different national fields is a major subject of inquiry” (page 411). Their paper is excellent but concentrates on nation–states rather than cities, “the primary goal of this Paper is to analyze changes in the centrality of the normative order of nation–state law and nationally-oriented legal practices under the influence of transnational, supranational, and international legal regimes and orders ...” (page 418).

<sup>(8)</sup> When estimating the global presence of a law firm direct presence is a solid indicator of a firms geographical scope and commitment to providing a global service. Using only indirect presence as a measure would be questionable because one has to bear in mind that firms are keen to present an ‘international image’ (international visibility, having an international presence on your notepaper, is a way to attract clients from both home and abroad). Indeed, Patrick Stewart (1991, page 9) writes that when the words ‘association’ or ‘affiliation’ are used they often connote “much more than the true status of the relationship—usually non-exclusive arrangements backed up by a few joint projects and not much more than the hope of referrals”. However, an important caveat when counting offices as a measure of direct presence is that one has to also be aware that “Firms proudly announce the opening of each new office abroad ... though they are often more discreet about the contraction and closure of offices” (Abel, 1994, page 738).

### A geography of globalisation

We present a London view of the geography of globalisation by focusing on the largest thirty City law firms (table 1). Between them, these firms have 221 foreign branches in sixty-eight cities across the world. The twenty-four cities in which 10% or more of these firms have branches are ranked in table 2. The most obvious feature of this table is the dominance of Brussels. Clearly, this is a specific political effect; as the headquarters of the EU Commission and its bureaucracy Brussels is developing a role analogous to Washington DC in attracting law firms.<sup>(9)</sup> However, our interest here is in the other twenty-three cities as indicators of the geography of globalisation.

Six cities form a stratum of cities below Brussels and they represent four separate regions: Hong Kong, Singapore, and Tokyo are from Pacific Asia, and western Europe, northern America, and eastern Europe are represented by Paris, New York, and Moscow

**Table 2.** Ranking of cities by number of London law firm foreign branch offices.<sup>a</sup>

Rank	City	Number of offices	Globalisation arena <sup>b</sup>
1	Brussels	25	Western Europe
2	Hong Kong	18	Pacific Asia
3	Paris	13	Western Europe
4	Singapore	12	Pacific Asia
5	New York	10	Northern America
6 =	Moscow	9	Eastern Europe
6 =	Tokyo	9	Pacific Asia
8 =	Beijing	6	Pacific Asia
8 =	Warsaw	6	Eastern Europe
10 =	Frankfurt	5	Western Europe
10 =	Madrid	5	Western Europe
10 =	Milan	5	Western Europe
10 =	Prague	5	Eastern Europe
14 =	Bangkok	4	Pacific Asia
14 =	Budapest	4	Eastern Europe
14 =	Dubai	4	Rest of the world
14 =	Ho Chi Minh City	4	Pacific Asia
14 =	Rome	4	Western Europe
19 =	Barcelona	3	Western Europe
19 =	Hanoi	3	Pacific Asia
19 =	Pirais	3	Western Europe
19 =	Sao Paulo	3	Rest of the world
19 =	Shanghai	3	Pacific Asia
19 =	Washington DC	3	Northern America

<sup>a</sup> Overseas cities with three or more branches from London's top thirty law firms.

<sup>b</sup> Western Europe = EU+European Free Trade Association;  
 Pacific Asia = ASEAN+China, Japan, Korea;  
 Northern America = Canada+USA;  
 Eastern Europe = ex-COMECON+ex-Yugoslavia, Albania.

<sup>(9)</sup> Brussels has the reputation of being the most overlawyered city in Europe (Budden, 1993, page 11) which makes the parallel with Washington DC so strong (also see Flood, 1995, pages 150–152). The reason that law firms want to be in Brussels is to be abreast of the legislative and economic integration of the EU. This is necessary to serve not only a client who operates in another member state, but also a client who only operates in the United Kingdom because that client is still subject to EC law. However, another reason is that clients expect an international law firm to have an EC practice, and so firms seeking an international profile establish an office there whether it is viable or not.

respectively. These four regions<sup>(10)</sup> account for 89% of London's foreign offices and we will focus on them as the 'prime globalisation arenas'. Despite their common attraction for London law firms, they differ greatly in two important ways: their trajectories to becoming globalisation arenas and their levels of political centralisation. Historically, two regions, northern America and western Europe, are long established bipolar core segments of the world economy. Pacific Asia is a mixture of new core and semi-periphery which emerged as a major region to rival the old core in the 1970s and 1980s. Eastern Europe has emerged as a globalisation arena of the 1990s. It is a special case of acute semi-peripheral disruption consequent upon the demise of COMECON with the collapse of European communism. In terms of political centralisation, Pacific Asia, consisting of more than a dozen states, is the most fragmented, whereas northern America is the most centralised, dominated as it is by one state, the USA. Western Europe lies between these two cases with multiple states but an emerging strong regional polity, the EU. Eastern Europe was highly centralised but has moved decisively towards the fragmented end of the spectrum since 1989 and has evolved a pattern not unlike Pacific Asia.

London law firms have 77 offices in 20 western European cities or, excluding Brussels, 52 branches in 19 cities. Remarkably, the latter statistic places western Europe second to Pacific Asia with its 63 offices in 11 cities. With a total of 140 offices in these two regions, they are by far the most important destinations for London law firms. However, they could hardly be more different. Western Europe can be considered London's 'home world region', whereas Pacific Asia is the principal globalisation arena for law firms. In western Europe there is concentration in the top four cities after Brussels in table 2 (Paris, Frankfurt, Madrid, Milan) with each from one of the four largest national economies (France, Germany, Spain, Italy). However, in Pacific Asia the concentration is much greater in the 'big three', Hong Kong, Singapore, and Tokyo, with only the latter, the weakest case, linked into a national economy. With two 'city states', Pacific Asia perhaps epitomises the future potential of globalisation: increased economic integration accompanied by increased political fragmentation, which is exactly what the EU is striving to prevent.

London law firms have 31 offices in 10 cities in eastern Europe and 23 offices in 11 cities in northern America. The latter figures are perhaps a surprise: why not more offices in the most prosperous section of the world-economy core? Furthermore, the pattern of northern American offices is the most concentrated of all with only one city, New York, featuring as a major location. We deal with this question of London and northern America in detail below. Eastern Europe is more like the other two regions with four major cities (Moscow, Warsaw, Prague, and Budapest) each servicing the four largest national economies (Russia, Poland, Czech Republic, Hungary) although perhaps these act more like 'city states' in their abandonment of hinterlands, especially in the former USSR.

To summarise, we can provisionally identify four globalisation arenas: (1) western Europe is London's home region with the widest dispersal of offices; (2) Pacific Asia is the principle globalisation arena; (3) eastern Europe is the secondary globalisation arena; and (4) northern America is a globalisation arena focused on a single city.

#### **In and out of London**

In order to evaluate London's role in the globalisation of law we need to look at foreign firms who have branch offices in London. There are a total of 129 foreign law firms with branches in London compared with the 221 foreign branches of London's

<sup>(10)</sup> Western Europe = EU+European Free Trade Association; Pacific Asia = ASEAN+China, Japan, Korea; Northern America = Canada+USA; Eastern Europe = ex-COMECON+ex-Yugoslavia, Albania.

top thirty firms.<sup>(11)</sup> The fact that there are many more London branches in other cities than foreign branches in London may be viewed as an indicator of London's importance as a global law centre but the situation is much more complicated than this overall picture suggests.

There are 16 cities whose law firms have three or more branches in London (table 3). The most obvious feature of this table is the extreme dominance of New York which contrasts sharply with the pattern of London's offices abroad, where New York is important, but is merely 1 of 6 'second tier' cities (table 2). This in-out contrast extends to other northern American cities which were conspicuous by their absence (except for Washington DC) in table 2 but here occupy all the top ranks and constitute just under half the cities represented. However, perhaps even more remarkable is the fact that there are no Pacific Asian (or eastern European) cities represented in London. On putting these facts together we are provided with a different view of how the globalisation arenas are integrated into the world economy in terms of the globalisation of law.

**Table 3.** Ranking of cities by number of branch offices foreign law firms have in London.<sup>a</sup>

Rank	City	Number of offices	Globalisation arena <sup>b</sup>
1	New York	26	Northern America
2 =	Washington DC	6	Northern America
2 =	Toronto	6	Northern America
4	Los Angeles	5	Northern America
5 =	Chicago	4	Northern America
5 =	Madrid	4	Western Europe
5 =	Milan	4	Western Europe
5 =	Panama City	4	Rest of the world
9 =	Copenhagen	3	Western Europe
9 =	Dublin	3	Western Europe
9 =	Houston	3	Northern America
9 =	Johannesburg	3	Rest of the world
9 =	Minneapolis	3	Northern America
9 =	Oslo	3	Western Europe
9 =	Paris	3	Western Europe
9 =	Sydney	3	Rest of the world

<sup>a</sup> Cities with law firms having 3 or more offices are listed irrespective of shared offices or shared headquarters.

<sup>b</sup> For regional definitions, see table 2.

A comparison of foreign law offices in London with London offices abroad in terms of the globalisation arenas indicates that the newer globalisation arenas have not developed a global law sector and are, therefore, receivers of global legal services (table 4, see over). Northern America appears as the arena with the strongest global law sector, which penetrates London in a way that London does not reciprocate (see table 2). Although western Europe and, interestingly, the rest of the world category have less law firm branches in London than vice versa, they do have some global law presence. In fact, it can be shown that London operates as an articulator for some other cities who have branches in London but are not themselves important enough players in the world economy to attract London law firms. Two such categories can be easily illustrated (table 5, see over). First, London acts as a centre for European cities

<sup>(11)</sup> As it is derived from just the top thirty largest London law firms, this figure of 221 is an underestimate of London total global presence in law. If the top fifty law firms are considered the figure rises to 279.

**Table 4.** Branch offices of foreign law firms in London compared to the top thirty London law firm's branch offices abroad by regions.

Abroad	In: foreign branches in London	Out: London branches abroad
Western Europe	34	77
East and Southeast Asia	0	63
Eastern Europe	1	31
Northern America	72	23
Rest of the world	22	23

**Table 5.** Branch offices of foreign law firms in London compared to the to thirty London law firm's branch offices abroad by selected categories.

Categories	In: foreign branches in London	Out: London branches abroad
Small European states <sup>a</sup>	18	0
Former, colonial states <sup>b</sup>	22	3

<sup>a</sup> Western European states which are not represented by cities in table 2 (that is, not France, Germany, Italy, Spain, in addition to Belgium because of the special case of Brussels).  
<sup>b</sup> British colonial states which are not represented by cities in table 2 (that is, not the USA and excluding Hong Kong and Singapore).

outside the four main national economies, for instance Copenhagen, Dublin, and Oslo (see table 3). This regional articulator role extends beyond these three cities (see table 5). Second, London has kept some of its imperial links in much the same way, for instance Toronto, Johannesburg, and Sydney (see table 3). Again, table 5 shows a very stark pattern, almost a one-way street into London.<sup>(12)</sup>

To summarise, we can see that by adding the presence of foreign law firms in London a somewhat more complicated picture emerges than the simple geography of London law firms' overseas offices. As well as the special cases of cities in small European states and former colonial cities, there is clear evidence of northern America's importance in global law relative to London. To put London's law firms into a more comprehensive perspective requires a preliminary comparison with their main global rivals, New York law firms.

#### London versus New York

In order to compare London with New York we focus on the top thirty law firms by size in the following discussion. Hence table 6 is constructed on the same basis as table 2, thus making them directly equivalent. Overall, New York's top thirty firms have 138 foreign branches in thirty five cities compared to London's 221 in 69 cities. This smaller and more concentrated pattern is reflected in table 6.

The most obvious contrast between the lists of cities with London and New York law firm branches (see tables 2 and 6) is the relative numbers—London's 24 compared with New York's 12. This is partly accounted for by the nature of the two cities' home arenas—New York's more politically unified home means that large numbers of its branches and people (see Warf, 1991, page 255) in other world cities remain within the USA and therefore are not recorded here. For instance, London law firm branches in Brussels are recorded, whereas New York law firm branches in Washington DC are not. Nevertheless, this does not account for all the differences. It is definitely the case that

<sup>(12)</sup> Note that in this case east and southeast Asian cities, Hong Kong, and Singapore are not included despite their imperial origins because it is assumed more recent globalisation processes dominate here.



**Table 6.** Ranking of cities by number of New York law firms' foreign branch offices<sup>a</sup>.

Rank	City	Number of offices	Globalisation arena <sup>b</sup>
1	London	21	Western Europe
2	Hong Kong	18	Pacific Asia
3	Paris	14	Western Europe
4	Tokyo	13	Pacific Asia
5	Singapore	8	Pacific Asia
6	Brussels	7	Western Europe
7 =	Frankfurt	6	Western Europe
7 =	Moscow	6	Eastern Europe
9 =	Beijing	5	Pacific Asia
9 =	Budapest	5	Eastern Europe
11 =	Prague	4	Eastern Europe
11 =	Warsaw	3	Eastern Europe

<sup>a</sup> Overseas cities with three or more branches from New York's top thirty law firms.

<sup>b</sup> For regional definitions, see table 2.

large London law firms have 'overall' a broader global reach than their New York counterparts. The main practical reason is the size of the USA's market for legal services which makes foreign investment relatively less attractive. Furthermore, this market is a noncompetitive arena in terms of foreign global law firms. London law firms have their New York 'toe-hold' here but New York law firms are well represented in four western European cities—Paris, Brussels, and Frankfurt, as well as London. Hence, with its more fragmented political structure, western Europe is a competitive global arena in the way northern America is not.

The similarities between tables 2 and 6 should not be overlooked however. In terms of attracting foreign law firms, the top 7 cities (substituting London for New York in each table) are the same, except that, for New York, Frankfurt joins Moscow at the bottom of this elite city stratum. Furthermore, all the remaining cities in New York's list appear in approximately the same location in London's longer list. In addition, 92% of New York law firms foreign branches are in the 4 globalisation arenas (compared to 89% for London) with 53 offices in 9 cities in western Europe, 51 offices in 8 cities in Pacific Asia, 22 offices in 7 cities in eastern Europe, in addition to 1 office in Toronto, the only northern American city in the data to qualify as foreign. We can infer from this that our original regional division identifying four globalisation arenas for law firms to be more general than just a London-based strategy.

Our overall conclusion from all our data analysis is as follows: (1) there are four globalisation arenas which dominate global law firm strategies; (2) western Europe is a competitive globalisation arena, within its home region London law firms have a greater presence than New York law firms, and London operates as a global gateway to other European cities; (3) northern America is a noncompetitive globalisation arena with New York having a gateway function for a relatively small London direct presence; (4) Pacific Asia is the principle open globalisation arena in which foreign law firms compete, with London law firms having a greater direct presence than New York law firms; (5) eastern Europe is the secondary open globalisation arena in which foreign law firms compete, with London law firms again having a greater direct presence than New York law firms; (6) the rest of the world is relatively unimportant to global law firms, although London does operate as a centre for some former British colonial cities.

## Conclusions

The study of law firms has been relatively neglected in producer-service and world-city research, but this Cinderella role should not be taken to indicate that this sector is any less susceptible to the attractions of a global market than other producer services. Law is distinct from other services in being fragmented into different jurisdictions with several major and distinct regional traditions (see, for example, Wood, 1997), but this has certainly not prevented the globalisation of law proceeding in a manner similar to other producer services. These similarities were highlighted in our discussions of why this globalisation was taking place. The particular needs of law in terms of local expertise were highlighted in our discussions of how this globalisation operated, with even the 'less sensitive' direct presence normally involving local lawyers as partners. It is when we come to answering the where of globalising tendencies in terms of major London law firms that we produce specific results which require confirmation from other service sectors. The very specific uneven globalisation that we have identified is in line with much thinking on globalisation, but has not been empirically illustrated in this way before.

In this paper we have just scratched the surface of the complex globalisation of London's law firms. Our study is limited and provisional and should serve as a seed-corn for further studies on the globalisation of law and law firms in general. The directions for further research generated from this paper, as we see them, are for: (1) more studies which utilise relational data to better integrate producer-service and world-city analyses so that economic processes and geographical outcomes can be seen as a single global phenomenon; (2) more studies on both the competitive context in the supply of legal services and the reasons for the rise of the patterns of demand (that is, distinctive arenas of globalisation) for legal services which we have identified; (3) more studies on the links between post-Fordism and the globalisation of law and law firms (also see Coffey and Bailly, 1992; Wood, 1991), or in other words, on the shift from "Cravathism" (Trubek et al, 1994, page 423) to post-Cravathism; and (4) more studies on how the geographies resulting from the globalisation of the provision of legal services are linked to the patterns of globalisation followed by other producer services such as accountancy and banking.

**Acknowledgements.** We would like to thank the Economic and Social Research Council (R000222050). Thanks also to three anonymous referees, Marcus Doel for suggesting the title, and Gordon Clark for his insightful comments on the first draft.

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