



Pen2Paper



A History Of The Waterman Pen Company

Early attempts to create a pen that held its own ink

The transition from mark making on surfaces such as clay with a pointed stylus to the use of ink and pen is believed to have begun at least 4000 years ago. The Romans developed an ingenious method for delivering ink to the page with the invention of a primitive fountain pen. A piece of reed from marsh grasses or bamboo was cut to form a nib at one end and the stem was filled with ink. The writer could dispense the ink to the nib of the reed pen by squeezing the reed. What is not recorded in the history books is to what extent this early reservoir pen leaked or spoiled would-be papyrus masterpieces.

There is also documentary evidence of an early prototype of a reservoir pen developed in the Middle East in the 10th century AD. It is recorded in *Kitab-al-Majalis wa 'l-musayarat* written in 953 that the caliph of the Maghreb, Ma'ad al-Mu'izz insisted on a pen that could be trusted not to stain his clothes or his hands. The text continues



that such a pen was provided and that it could be held upside down without leaking whilst holding ink in its reservoir that was delivered to its nib.¹

Quills and Dip Pens – the non-reservoir alternatives

At around the same time that paper made its journey to Europe in the 8th century AD, quill feathers became the most popular writing instrument and remained so for a thousand years. The word pen derives from the Latin word *penna* meaning 'feather'. Each quill would last for a week and took considerable preparation. It required sharpening with a pen knife and the drying of ink was hastened by a small coal stove under the table.



The 19th century brought about the beginning of the transition from quill pens to steel dip pens. Many of the first dip pen manufacturers were based in the Jewellery Quarter of Birmingham with John Mitchell being credited with the introduction of mass production of steel pens in 1822. By the middle of the 19th century, half of the world's steel dip pens were being produced in Birmingham.

The Jewellery Quarter today boasts The Pen Museum², dedicated to the history and legacy of the city's steel pen industry. Their website asserts;

"During the 19th Century, 75% of everything written in the world was with a 'Birmingham' pen. Birmingham was at the forefront of this trade until it declined in

the 1950s with the invention of the biro and fountain pen. At one time, there were around 100 factories in the Jewellery Quarter area. The development of the steel pen reduced the cost of writing and enabled the spread of literacy throughout the world.”³

The first patented fountain pens

The first fountain pen models also appeared at the start of the 19th century. These were dogged with design flaws, which invariably lead to the ink leaking from the reserve. These early prototypes still made use of a quill nib until gold nibs became more popular. The huge benefit and perhaps impetus behind the early inventors was the advantage of the writer being spared from constantly having to dip the nib for ink. Early patents were issued to Baltimore shoemaker, Peregrin Williamson in 1809 followed by John Scheffer in Britain in 1819. The first self-filling fountain pen was patented in 1813 by John Jacob Parker in 1813.

Lewis Waterman and the motivation to invent a reliable fountain pen



Lewis Waterman was an insurance broker in New York City. In 1883, he was on the verge of securing a lucrative contract with a client. At this time, salesmen would often wear a vest chain (similar to those that secured a pocket watch). The chain would extend into both waistcoat pockets with a metal container of ink at the end of one chain and a foldaway pen holder at the end of the other chain.

Waterman shied away from the vest chain and instead invested in a new reservoir pen with the intention of impressing those he did business with. When the time came for the important contract to be signed, the reservoir pen failed to impress, in fact it failed to write at all, leaving nothing but a significant blob of ink of the contract. The client was unimpressed and left without agreeing to the negotiated business deal whilst Waterman hurried back to his office to try and find another copy of the contract.



Salesman turns Inventor

Lewis Waterman noted that none of the pocket pens or reservoir pens that were available had any mechanism to ensure the control of ink. He travelled to stay with his brother who lived on a farm in upstate New York and set about designing his own feed which could be fitted to a pen, rather than relying on the leaky reservoirs of existing models.

Waterman wanted to make use of capillary attraction in his pens; this meant that air would ensure that ink flowed to the nib at a steadier and therefore more reliable



rate for the writer. This multi-feed approach involved a groove in the feed that would allow for the intake of air at the bottom of the groove and three narrow slits. Bubbles of air would be drawn in and gently force the ink from the barrel through the slits in an even flow to the nib of the pen. The prototype of this ingenious design was first made from the spoke of a wagon wheel, taken from his brother's farm.

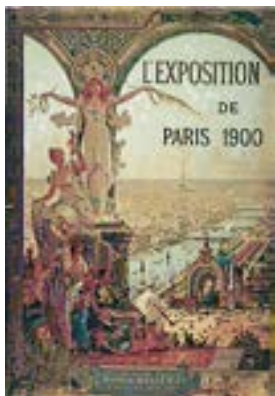
Waterman's first pen was called 'The Regular' and was attractive to look at as well as to write with as it was decorated with wooden accents. It was patented in 1884 and sold from the rear of a cigar shop on the corner of Fulton Street and Nassau Street in New York City for the first year of production. Waterman offered a five year guarantee with his pens and it is believed that he sold four or five pens a week in the first year. He obtained the gold nibs that were tipped with iridium from regular suppliers as these were often used with dip pens available at the time. The parts that were made from vulcanised rubber were manufactured in a factory in Seymour, Connecticut which he would later purchase for the Waterman Pen Company.

From Inventor to Salesman once more

By 1885, Lewis Waterman had moved his pen business from the back of a cigar shop to his own premises on Lower Broadway. Waterman launched an advertising campaign with the company name of the Ideal Pen Company and he was quick to use his salesmanship to develop an extensive marketing strategy that included testimonials for his pens such as;

"It never soils the fingers."

"It is always ready, without pounding or shaking."⁴



Waterman also invested in advertisements for his pens in several popular magazines across the United States including the well-known Review of Reviews Journal. Waterman's company was formally incorporated in 1888 and the following year a factory was opened in Montreal as the catalogue of Waterman pen models increased. At the 1900 Paris Exposition, the company exhibited and were awarded a gold medal for their products.

Lewis Waterman died in 1901 and his nephew, Frank D Waterman took leadership of the company. Sales increased steadily to 350,000 pens a year with the company boasting impressive offices in Manhattan in addition to factories in Connecticut and Montreal.



Offices in Manhattan from 1906



The Battle of the Fillers

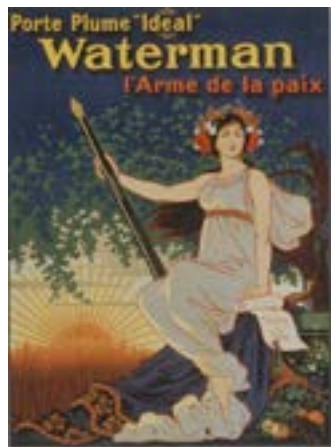
Regulating the flow of ink to the nib was a significant achievement in ensuring the success of the fountain pen and was in many ways the making of the Waterman Pen Company. The next challenge was simplifying the messy process of filling the pen with ink. For the first twenty years of production, ink was placed into the fountain pen's barrel with the use of an eyedropper. This invariably caused leakage at both the screwed joint of the barrel and into the cap.

At the turn of the century, internal rubber sacs were introduced into the barrel of the pen and with this came the challenge of inventing the best method for filling these sacs with the necessary ink. Waterman's solution to this problem was the coin filler in 1913. A slot in the barrel of the pen allowed the writer to insert a coin which would compress the sac sufficiently that



when the nib was placed into the ink bottle, the coin could be removed and it would draw the ink through the nib into the sac. Other popular variations included the lever filler introduced by Schaeffer and the button filler designed by Parker.

The Roaring Twenties



The success of the coin filler as well as a large product range saw the Waterman Pen Company as the market leader into the 1920s. By this time, the company had subsidiaries in France, the United Kingdom and Canada. The moment in history to epitomise the success of the Waterman Pen Company was the use of a solid gold Waterman pen at the signing of the Treaty of Versailles in 1919⁵, marking the end of the First World War and the establishment of The League of Nations, a global peacekeeping organisation and forerunner to

the United Nations. This unique historical event was later referred to in a Waterman advertisement;

Waterman enters the Ball Point Market

By the 1930s, many of Waterman's contemporaries had evolved their product ranges with new innovations and technical advances. Waterman's reputation had always focused on reliability and quality and they were not as quick to respond to the changing fountain pen market and this had a detrimental effect on their market share. By the mid-1940s, Waterman, like many other fountain pen manufacturers were losing money due to decreasing sales. In 1949, Waterman produced its first ball point pen, known as the Ball Pointer with a retail price of one dollar. The good

reputation of Waterman formed the basis of their marketing strategy with slogans such as;

“Avoid regrets – get famous Waterman’s quality for sure performance”⁶

Waterman appreciated the scepticism of the ball point market customers by pricing the pen at just one dollar compared to the three dollar price tag of the mechanical pencil produced as part of the matching range. By 1953, the Waterman Company felt brave enough to venture into the higher end of the ball point market, with the launch of the Sapphire model which was billed as the ‘ world’s largest selling jewel point pen’.⁷ The Sapphire featured a synthesised diamond point and was priced at \$10 for which the customer received not only the pen but an additional



gift item such as a wallet. In 1955 Waterman launched the Cartridge Filler fountain pen which was also known as the CF and was one of Waterman’s most successful products. The CF pen was one of the first to make use of a plastic ink cartridge and was manufactured in the United States and Canada until the company’s sale in 1958.

The Waterman – Bic Partnership

Whilst the Waterman Pen Company was struggling to adjust to the dwindling popularity of fountain pens in favour of ball point pens, Marcel Bich of France was enjoying phenomenal success with his cheap and reliable ball point pen in Europe.



Bich had begun his career as a production manager for an ink company before establishing his own company manufacturing parts for mechanical pencils and fountain pens in Paris in 1945. As the first ball point pen models emerged after the Second World War, Bich expanded his business to include the manufacture of plastic barrels for the new disposable pens. By 1949, Bich had designed his own disposable ball point pen which retailed for just 19 cents compared to the early models in the United States which sold for over 10 dollars. Unlike many of the early models sold in North America, Bich’s design did not suffer from leakage and clog-

ging problems and by 1955, annual sales in Europe were in excess of \$5 million.

Bich's success in the United States took longer than expected as the American public were suspicious of any advertising claims about the success of ball point pens. At this time, the Paper Mate Company stood alone as one of the only companies to produce a reliable and relatively low cost ball point pen. Bich needed to find a brand name that was already trusted by the American people and a reverse merger with the Waterman Pen Company in 1958 provided a solution to this problem.

In 1958, Bich made an offer to purchase 60% of Waterman for \$1 million. Once Marcel Bich became fully aware of the financial affairs of the Waterman Pen Company, he was able to acquire the remaining 40% of the company at no additional cost. The company was renamed the Waterman-Bic Corporation so as to gain maximum benefit for Bich as he attempted to secure a foothold in the American ball point pen market. The Waterman-Bic Corporation established its headquarters in Milford, Connecticut close to the former headquarters of Waterman in Seymour, Connecticut. By the mid-1960s, Bic had sold off the older operation and ceased to manufacture Waterman pens. It is reported that when the Waterman managers tried to persuade Marcel Bich to produce a ball point pen to rival the successful Paper Mate models at a higher price than the 29 cent Bic ball point he reportedly replied;

"Waterman is 100% mine. You are going to do what you are told."⁸

By 1971, the Waterman reputation had served its purpose in bringing the Bic name and product range to the forefront of the American pen market and the Waterman-Bic Corporation was renamed the Bic Pen Corporation.

Waterman moves to France



Subsidiaries of the Waterman Pen Company had existed in Europe since the height of their success in the 1920s. Jules Isidor Fagard established a French subsidiary known as JIF Waterman in 1926. By 1936, JIF Waterman were selling Waterman pens with ink cartridges made of glass. Whilst these were manufactured in the United States, it is thought

that the American Waterman division may have wanted to test out their feasibility in Europe before launching a cartridge pen at home.⁹ JIF Waterman, led by Fagard and his wife Elsa, are credited for ensuring the continuation of the Waterman product range and name following the merger of the North American division in 1958.

Gillette Purchases Waterman

The astute leadership of the Fagard husband and wife team had safeguarded Waterman's market share and reputation as a manufacturer of quality writing instruments. By the mid-1980s, the American giant, Gillette, who had already purchased the Paper Mate Company in 1955, expressed an interest in purchasing Waterman. The Director General of Waterman, Francine Gomez, sought assurances from Gillette that both manufacturing and design of the Waterman product range would remain in France and a deal was reached in 1985. By 1988, Francine Gomez had resigned as Director General and president of Waterman as Gillette instigated plans to sell Waterman pens in office discount stores such as Staples;

"To her that was sacrilege, like peddling Rolls Royces fender to fender with Fords."¹⁰

Despite Gomez' objections, it was a successful strategy that contributed to a quadrupling of earnings for Gillette in their stationery products division between 1986 and 1988. In 1992, Gillette added to their pen company portfolio with the purchase of the Parker Pen Company for \$485 million.

Waterman and the Future

In 2000, Newell Rubbermaid purchased the Gillette portfolio of writing products which included Parker, Waterman, Paper Mate and the Liquid Paper brands. They are now the global leader in writing instruments also owning brands such as Sharpie who are the number one brand of writing instruments in the United States. Newell Rubbermaid now produce just 47 writing instruments as part of the Waterman range with approximately the same number of products in each of three categories; fountain pens, ball point pens and roller ball pens.

Waterman is recognised as the oldest manufacturer of fountain pens, still in existence today, 130 years after Lewis Waterman received his first patent following the loss of that vital business contract. From the humble beginnings of one salesman fashioning a reliable pen feed from a wagon wheel spoke in a country farm in the 1880s to a prominent position in the portfolio of the global leader in the writing instrument, the enduring tale of Waterman is one of triumph over adversity and dogged determination to produce a superior writing instrument.

1 C E Bosworth, A Mediaeval Islamic Prototype of the Fountain Pen? Published in the Journal of Semitic Studies, 1981, located at : <http://jss.oxfordjournals.org/content/26/2/229.extract#>

2 More information about the Pen Museum can be found at: <http://www.penroom.co.uk/>

3 Quotation taken from <http://www.jewelleryquarter.net/visit/museums/the-pen-museum/>



4 Lewis Waterman testimonials quoted in A Lief's article He Found A Way published in Mechanix Illustrated, Sept 1954, located at: http://blog.modernmechanix.com/mags/MechanixIllustrated/9-1954/watermans_pen/watermans_pen_0.jpg

5 The use of a Waterman pen at the Treaty of Versailles is cited in several articles including: <http://inventors.about.com/library/inventors/blwaterman.htm>

6 Advertising slogan quoted in H Gostony & S Schneider, The Incredible Ball Point Pen, p49, 1998, Schiffer Publishing Ltd.

7 Quotation taken from H Gostony & S Schneider, The Incredible Ball Point Pen, p49, 1998, Schiffer Publishing Ltd.

8 M Bich quoted in Bic Corporation History located at <http://www.fundinguniverse.com/company-histories/bic-corporation-history/>

9 R Binder Filling Systems Histories: Cartridge Pens located at http://www.richardspens.com/?page=ref/fillers/cart_pens.htm

10 G McKibbon, Cutting Edge: Gillette's Journey to Global Leadership, p264, 1998, Harvard Business Press.

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