Reading and Managing Service Businesses: An Integrated Case Study Approach

Key Themes

• How do different business activity systems interact within and between service businesses?
• How is value created and what types of value are created by service businesses?
• Case study-based approaches to reading and managing service businesses
• Developing an integrated approach to service businesses
• Hybrid manufacturing or selling products as services: Rolls-Royce and the Flowserve Corporation
• TikTok and platform-based services
• Zara, design, supply chains and logistics
• Reading the Dubai city-region as a service space
• Retail malls and service experiences: reading The Dubai Mall

Service businesses exist to create value and value-in-use through the sale of products and services and various combinations of products and services. Multiple values are created through this process including profit or economic rents and surplus value, but also social, community and individual benefits. The service-dominant logic approach (see Chap. 2) emphasizes that value is created by beneficiaries and co-created by multiple actors that in some way influences beneficiaries. This is a complex process involving intra- and inter-organizational collaborations.

This book has developed an integrated or systematic approach to reading and managing service businesses. Our intention has been to identify and explore all the key activity systems, or domains, that are important for understanding the creation of value by service businesses. Our object of study is service businesses rather than some element or processes within service businesses. Each chapter has focussed on one process, or business activity system, that plays a critical role in service businesses, but also the ways this process is positioned within the wider context of service businesses. Each process is part of a more complex system of systems or set of interlocking business activity systems that, working together, transform inputs into all types of value.

This chapter is very different from the preceding chapters. Our intent in this chapter is not to focus on a business process or activity system, but rather to highlight how different processes work together within service businesses to create value. This approach is based on case studies. The aim is not to develop extremely detailed case studies as these rapidly become outdated. The purpose of this final chapter is to provide a nested-based approach to understanding service business. The aim is to develop integrated case studies that reflect some of the complexities of

Electronic Supplementary Material The online version of this chapter (https://doi.org/10.1007/978-3-030-52060-1_14) contains supplementary material, which is available to authorized users.
managing and organizing service businesses. Innovation and heterogeneity are core central themes that cut across these case studies. Our integrated approach to case studies is perhaps more indicative compared to the more conventional approaches adopted in other books. It is indicative of the complexity of service businesses and the inter-organizational relationships that sit behind the co-creation of service experiences and service values. This chapter is intended to stimulate questions and a debate over the integration of the themes and topics explored in this book.

This chapter has three aims. First, to begin to develop integrated approaches to service businesses by exploring five cases. These are: Rolls-Royce, Flowserve, TikTok, Inditex (including Zara) and Dubai. The last case, Dubai, represents a different approach as in this analysis we develop a broader perspective on the development of a city-region and the role service businesses play within city-regions. In this account, we explore three dimensions of Dubai: as a service economy, as a location for service spaces—the Dubai Mall—and of service businesses. Here the challenge is to explore the ways in which an observer can ‘read’ a city-region as a service space and can read a particular servicescape—a shopping mall.

Second, the intent is not to develop complete case studies, but for these cases to be the starting point for further analysis and debate. Here it is important that readers of this book update these cases and are also able to add to them based on their own interests in particular aspects of service business. Third, to provide a mix of different styles of case study. These include more academic-style case studies to individual readings of city-regions and of service spaces.

14.1 Case Studies and Service Business

In developing this book, we engaged in a discussion regarding the importance, or unimportance, of using case studies to inform the analysis of service businesses. This discussion began with a debate regarding the definition of service business. This included:

1. The cultural attributes of service work/employment. What is the nature of a manufacturing job versus a service job? The technical aspects of employment including skills and training.
2. The need to explore different types of service and manufacturing businesses including public services. This should include an account of pure services and manufactured goods as well as hybrid combinations.
3. A service is a quality that is realized in the future. There is temporality to the service experience as the same person might experience the same service in a different way depending on the location and time of the experience. A good is more standardized but will also be experienced by consumers in different ways. Service providers try to standardize services, but their interpretation by consumers will be different depending on mood, time, expectation, experience and background.
4. Differences between the business model approaches developed and managed by different service business firms including capital versus labour-intensive approaches.
5. A service firm is a business and there must be an emphasis placed on the nature of the service that is provided to customers, the quality and nature of the service experience, but it is important that the analysis also explores profit and risk versus reward. There is also an interesting relationship between the nature of the service experience that is created and the reward—quality and cost versus profitability.
6. There are three dimensions or characteristics of services: experiences; the operational delivery of intangibles or service experiences and outputs and the on-going blurring of the boundaries between goods and services.

This book was intended to develop an integrated approach to understanding the challenges and problems of running service businesses. This was an account of what works but also of what does not work. This includes identifying generic issues and then aspects of service business that apply to specific sectors or types of services. There are two types of case studies included in
this book. First, short explanatory cases that are integrated into the earlier chapters. Second, more developed case studies of firms, or more integrated case studies, which are the type developed in this chapter.

There are three problems in using case studies. The first involves the selection of the cases and discussions on how representative these cases should be. This must also include a discussion on the orientation taken in the account of a case. Should the case be written from the perspective of the service consumers, service employees, managers, owners or all of these stakeholders? This is an important issue for understanding service businesses. Yesterday, one of the authors of this book had an interesting service experience. His car identified a potential problem with tyre pressure. This required a visit to a recently opened garage for the first time. This was the closest garage and he was away from home. The mechanics identified that the wheel had a screw embedded within the tyre and that they would try to make a repair. If this attempt failed, then two replacement tyres would be required. It took 20 minutes to repair the tyre and this garage provided this service for free. For the garage, this free service was the first stage in a journey of relationship building with a possible future customer and for the ‘customer’ that was an unexpected, but high-quality service experience. This is a brief vignette of a service experience from the point of view of the customer rather than a more formal company case study. But understanding service businesses involves both appreciating the quality of the experience and how it is produced and co-created.

Second, a company case study is an account of a firm as it operated in the past. Thus, case studies provide academics and their students with a historical account of firms. This is problematic as businesses are in a continual process of becoming—of change, modification and innovation. New routines emerge and existing routines change. A case study might be of a very special business—one that is inimitable. Such case studies are interesting but raise questions about applying learning from one case to another. This raises questions about the role case studies play in understanding economic activities and the management of service businesses.

Third, a single case of a firm must come with a set of health warning. All firms will project a corporate narrative that might balance corporate social responsibility with employment opportunities and profitability. The challenge is to ensure that a case study draws upon many sources of evidence to ensure that the case is rigorous and robust. There is a real danger that a case study is presented as unique and exceptional (Tokatli 2015) or that it highlights one aspect of a firm’s activities over many others. In this book, we have adopted an unusual approach to exploring firms. This integrated approach explores as many aspects of service business as possible. The conventional approach would be to focus on the internationalization of service businesses or the marketing of service businesses. This is to focus on one business task or process rather than on understanding the complexity of tasks, and the blend of tasks, involved in creating value-in-use through the co-creation of services.

There are many types of case studies including industry, firm, subunit of a firm (branch, international aspects), city-region or city. There are many styles of case studies or approaches to creating case studies and many of these are rather formulaic. Here the aim is to raise questions regarding the development of a more integrated approach to understanding and managing service businesses by identifying relationships between different business processes.

14.2 Manufacturing as Service: From Rolls-Royce to the Flowserve Corporation

The delivery of a service provides an opportunity for firms to develop relationships with consumers. These can be relationships that are formed during face-to-face encounters or that are mediated by information and communication technologies. The relational element that is central to a service production process represents a relational asset that may provide a firm with a competitive advantage in the marketplace. The manufacture
and sale of a standard good that is not wrapped around with services provides limited opportunities for producers to develop long-term relationships with consumers. Relational assets are not owned by a company, but they are available to a firm and can be managed and developed. Such assets include customers, suppliers (parts, raw materials, finance) and strategic partners. Relational assets are formed around dyadic relationships based on face-to-face contacts, direct experience, reputation and ultimately trust. This type of relationship-focused strategy enhances the inimitability of a firm’s competitiveness strategy. Customers purchasing a good may be transformed into captive consumers of a set of supporting services making it difficult for this relationship to be broken or copied by competitors.

To create value, relational assets can be translated into customer-connecting and non-customer-connecting processes and this classification mirrors the distinction made between product-supporting services and production-supporting services (Chap. 2). It would perhaps be conceptually beneficial to alter the former to include people and customers by changing the description of this process to product/customer-supporting services. The argument is that firms selling goods have limited opportunities to develop relational assets whilst firms providing product/customer-supporting services have much greater opportunities. Relational assets represent an important opportunity for firms to develop new product/good and service bundles that could be sold to existing consumers. Developing and exploiting relational assets, however, require firms to learn and develop new competencies. It also implies that employees and firms must be sensitive to service quality, service experience as well as the creation of value-in-use.

The starting point for this analysis is manufacturers who have begun to convert their products to services. This topic was explored in Chap. 12 when we explored services within manufacturing firms or the blurring of the boundaries between manufactured goods and services. Hybrid production systems and hybrid products have been developed by all types of small and large firms. All production systems involve the hybridization or blending of service tasks with manufacturing tasks. A manufacturing firm has within it many different types of service workers performing service tasks including finance, human resource management and procurement. Service firms are unable to create services without manufactured goods. Some companies have developed complex hybridized good/service product bundles that blur the boundaries between goods and services. These are products in which a physical good has been transformed into a service through the development of a service-led business model. It is useful to explore two case studies of firms that have developed hybrid manufacturing systems or product service systems and are involved in the creation of hybrid goods: Rolls-Royce engines and an American manufacturer of industrial pumps.

### 14.2.1 Rolls-Royce

Rolls-Royce is one of the most frequently cited examples of a firm that has shifted towards a service-based business model. In the financial year 2017–2018, 50% of this firm’s revenues were derived from the delivery of services and 50% from selling equipment (Rolls-Royce 2018, p. 18). In 1987, Rolls-Royce ‘supported our engines in service by offering repair and overhaul arrangements which often failed to align our interests with those of our customers’ (Rolls-Royce 2007, p. 14). At this time, services were considered as a supporting set of functions rather than as an integral element within the firm’s business model. Since 1987, Rolls-Royce has transformed itself into a provider of power rather than a provider of engines. This transformation has occurred in the firm’s core market segments ranging from civil aviation to defence aerospace and marine engines. Central to this transformation is the firm’s installed base of engines that provides significant opportunities for ongoing growth in the delivery of product-based services. By 2018, 90% of the current Rolls-Royce widebody fleet...
of engines were covered by TotalCare service agreements (Rolls-Royce 2018).

The transformation of Rolls-Royce into a company that provides services has involved the company in developing:

comprehensive through-life service arrangements in each of our business sectors. These align our interests with those of our customers and enable us to add value through the application of our skills and knowledge of the product. In 2007, underlying aftermarket service revenues grew by nine per cent and represented 55 per cent of Group sales. This growth has been achieved partly as a result of the introduction of new products, but also because our ownership of intellectual property enables us to turn data into information that adds value to our customers. (Rolls-Royce 2007, p. 14)

A good example of this shift is the mission ready management solutions (MRMS®) package developed by Rolls-Royce. MRMS® provides the military with customized solutions that include total support packages and ‘Power by the Hour’®. With the latter package, major airline and defence customers pay a fixed warranty and operation fee for the hours that an engine runs. Contract performance is measured against the performance of the fleet and in terms of ready for issue engine availability.

Rolls-Royce offers three types of service solution. First, TotalCare is based upon an agreed rate per engine flying hour enabling customers to engage in accurate financial forecasting. This package is designed for airline fleet and it transfers the technical and financial aspects of fleet maintenance from customers to the service supplier. At the same time, it converts Rolls-Royce into a service provider or more precisely into a provider of hybrid products or product/good service systems. Second, CorporateCare is intended for corporate and business jet customers and is designed to ensure that aircraft are available when required and also may result in increased residual value. Third, MRMS® is targeted at defence customers providing them with engine management and maintenance ensuring 24/7 operational capability. These types of hybrid products have transformed Rolls-Royce from a company that designs and manufactures engines to a provider of turnkey engine power (Table 14.1). To maximize profitability, Rolls-Royce must now focus on the effective management of an extended manufacturing value chain or its hybrid production system. This includes the design and development of engines, installation, after-sales maintenance, repair and overall services and parts availability and management.

This service-informed business model has advantages for both Rolls-Royce and its customers. On the one hand, Rolls-Royce is able to develop a long-term relationship with customers providing the company with a relatively secure and predictable flow of revenue for the provision of services. These types of service agreements lock customers into long-term relationships with service providers. On the other hand, customers know that ‘power’ is available when needed and are also able to predict the costs of accessing power. Engine reliability is critical for customers as any downtime not only results in significant costs including loss of revenue, but also damages the relationship between an airline and its customers.

### 14.2.2 Flowserve Corporation: An American Manufacturer of Industrial Pumps

Companies that provide machine tools and parts that are an integral part of a customer’s production system must compete on the quality of the product combined with service and reliability. The Flowserve Corporation is an American company specializing in the design, manufacture, marketing and servicing of flow-handling equipment. This company sells engineered pumps, precision mechanical seals, valves and a range of related services to the petroleum, chemical and power industries.

Flowserve can trace its origins back to 1872 and, like all manufacturing companies, it has had to cope with intensified competition. Since 1997, this company has focussed on core areas and has also engaged in a cost-cutting programme that has involved transferring the production of pumps from a high-cost plant located in Belgium to two
factories in the Netherlands and also opened a valve production plant in Bangalore.

The manufacture and sale of pumps and valves responds to periods of economic growth and decline and related profitability and this is influenced by macro-economic trends. Flowserve realized that the service and repair of existing equipment amongst its captive customers was an activity that was not subject to cyclical downturns. In 1997, the company established a Service Repair Division that focussed on providing services to already installed equipment. According to Flowserve’s then Chief Executive Officer, Bernard Rethore:

we saw an opportunity to give new emphasis and focus to the service business so that we’d go beyond just manufacturing and what had been done before by each company in repair and maintenance and get into the service business in a whole new way. (Rethore and Greer 1999)

The service division became the Flow Solution Division in early 1999 creating a single, world-class vehicle for the delivery of integrated services. This division operates from a network of 75 service and quick response centres to provide 24/7 customer support. The company has also produced smart sealing products containing built-in microprocessors and equipment-monitoring software.

Flowserve has become a cradle-to-grave company that not only designs and manufactures flow-handling equipment, but also provides long-term services. The company has realized that one of its most important assets is existing installed equipment and this is now seen as an important captive market. The company’s then Chief Operating Officer, C. Scott Greer, noted that the supply chain was shifting and one example of this shift is evidenced in the service aspect of our business. Traditionally, our customers had done much of their own service while we supplied the parts. Many of these customers are starting to say, Wait, we want to move upstream to get closer to the consumer, identify products that differentiate us. We’re going to let the maintenance of pumps and valves go to those people who are the experts.” I think you’re going to see, because of this basic change in focus, double-digit growth in our service business. You should think of Flowserve as a “cradle-to-grave” type of company. We’re focusing on the entire life cycle of the product. (Rethore and Greer 1999)

A good example of this ‘cradle-to-grave’ approach has been the introduction of ten-year standard warranties for some of the company’s products. This provides customers with a long-term relationship with Flowserve based around the provision of original equipment manufacturer produced spare parts, guaranteed Flowserve field and shop maintenance, a reduced risk of downtime and protection from the costs associated with the failure of a piece of flow-handling equipment.

### Table 14.1 The transformation of Rolls-Royce from a provider of goods to a provider of hybrid products

| Good | Service |
|------|---------|
| Delivery of engine | Delivery of power |
| Traditional support | Enhanced support | Advanced support | Total support | Extended support |
| Spare parts Repair and overhaul | Data and forecasting services | Technical and logistics support | Customer training | Comprehensive package integrating elements of basic and enhanced support Spares, including repair and overall contracts | Complete, availability-based services. Can cover all aircraft or some aircraft activities Configuration management and reliability enhancements covered | Partnered capability Turnkey service Non-propulsion-related support solutions |
| Customer responsibility | Service provider responsibility |

Source: Authors’ own
Flowserve has developed from a manufacturing firm to a company that sells products and services by utilizing ‘our LifeCycle Advantage program to establish fee-based contracts to manage customers’ aftermarket requirements. These programs provide an opportunity to manage the customer’s installed base and expand the business relationship with the customer’ (Flowserve 2018, p.7). These LifeCycle services are designed around a customer’s specific key performance indicators (KPIs) and are intended to ensure that customers focus on those areas that require improvement including equipment performance, energy audits, optimization to improve asset utilization, simplified procurement and on-site training.

### 14.3 TikTok and Platform-Based Service Businesses

Rolls-Royce and Flowserve are manufacturing firms that have innovated through the development of new service-oriented business models. Platform-based businesses provide a very different approach to developing and managing a service business. Many of these are based on multi-sided service business models (see Chap. 3) that provide free services linked to advertising revenue. Such multi-sided platform-based business models include Facebook, Google and Twitter. The majority of these international platform-based businesses have been established by American companies. In 2017, TikTok was one of the very few Chinese apps to successfully enter Western markets. In 2018, TikTok was the most downloaded application from Apple’s App Store.

TikTok is perhaps an unusual app that is part of the strange world of social media dance routines and viral pranks. It is an app that targets teenagers. In China, apps like TikTok became extremely popular with younger people spending considerable periods of time using social media. This led to the Chinese government insisting that from June 2019 short-video apps, including TikTok, would need to include a ‘youth mode’ that would permit parents to control their children’s use of the app. TikTok enables users to share short 15-second videos of themselves lip-syncing or dancing to songs. Popular subjects for lip-syncing on TikTok are TLC, the American girl group, Tyler The Creator, the rapper and Narendra Modi, the prime minister of India. These videos include special effects and filters. Users can also reply to a TikTok post and create collaborative videos including responses to challenges. TikTok’s owner, Bytedance, is one of the very few Chinese technology companies to develop a platform-based product that has been extremely successful outside China. The app applies artificial intelligence to identify users’ preferences and interests to provide a targeted customized user feed. The TikTok app was initially introduced in China under the brand name Douyin in September 2016. In 2017, Bytedance released the app to core international markets under the brand name TikTok.

There are two important questions to explore regarding the transformation of Douyin into an international platform-based service. First, how did TikTok internationalize? The difficulty with platform-based service businesses is that they encounter high barriers to entry based on networking effects (see Chap. 4) that lock consumers into existing providers of social media. For Bytedance, introducing TikTok to Western markets was challenging as Western consumers already had messaging apps. The challenge was how to embed TikTok in existing Western social media platforms. The solution was for Bytedance to acquire Musical.ly for around $1bn and to merge this company’s social media platform with its own video service.

Musical.ly was a start-up company based in Singapore, but with an office located in Santa Monica, California, that allowed users to create short lip-syncing and comedy videos. The Musical.ly app was already popular amongst American teenagers. TikTok merged with Musical.ly on 2 August 2018 and existing accounts and data were consolidated into one app under the brand TikTok. This meant that users of Musical.ly did not have to download TikTok as the Musical.ly app was automatically updated to TikTok. By 2019, TikTok had over 300 million users outside China including 5 million in the UK.
and 120 million in India. In comparison, Snapchat had around 210 million users and Twitter only 145 million monetizable users. The growth of TikTok highlights the importance of placing an app on the smartphones of millions of possible users. Existing smartphone apps and operating systems may lock users into a particular combination of apps. The challenge is to develop an approach that tries to ensure that a new app overcomes any existing networking effects.

Second, TikTok has been downloaded by over 110 million Americans and these users are mostly young. The app targets children from age 13. In September 2019, concerns were raised over Bytedance using TikTok to further China’s foreign defence policy through censoring material. This concern included discussions on TikTok as a potential counter-intelligence threat and as an app that could be used to influence US election outcomes. By November 2019, TikTok’s non-Chinese user data was not stored in China, but before February 2019, US user data might have been stored in China. There is another concern, which is the potential for the app to become a tool used by paedophiles. Regulators in the US and Europe have begun to consider TikTok and Bytedance has been trying to self-regulate the app. Nevertheless, Bytedance is trying to negotiate the regularity frameworks that are emerging and intended to ensure that apps do not harm consumers.

There is an interesting geopolitical problem facing platform-based businesses like TikTok. This includes the different data regulatory regimes existing in China compared to other national economies. TikTok has to try to balance these different systems. At the moment, the company is beginning to enhance its multi-sided business model by increasing revenue from targeted advertising. Nevertheless, the key risk remains that it might become impossible for a company like TikTok to continue to provide services to customers based in China and elsewhere.

Bytedance has a series of country-specific advantages including access to Chinese consumers that can be involved in the co-creation of new products. It also has access to large quantities of big data enabling it to develop novel approaches to the application of social media platforms to generate new forms of data-related platforms. The company also has firm-based advantages including its information and knowledge base and the ability to create social media platforms. Nevertheless, the internationalization of TikTok required Bytedance to acquire another company’s ownership-specific advantages. One strategy adopted by companies formed in emerging markets is to blend their country-specific advantages with another company’s ownership-specific advantages through mergers and acquisitions or the establishment of some form of joint venture (see Chap. 10). The acquisition is often an established company based in a developed market economy.

14.4 Zara: Design, Retail and Logistics

TikTok is a twenty-first century platform-based business based on algorithms. The interface between the consumer and service provider is mediated through a computer program and smartphones. Zara, the retail company owned by the Spanish company Inditex, is a very different type of service company producing a very different style of service experience and related values.

Inditex is one of the world’s largest fashion retailers that owns eight retail brands (Zara, Zara Home, Pull&Bear, Massimo Dutti, Bershka, Stradivarius, Oysho and Uterqüe). It sells fashion collections in 202 markets and by the end of 2018 had a network of 7490 stores located in 96 markets and was selling fashion online in 96 markets. Inditex continues to expand its retail network at a time when many retailers are failing or restructuring in response to competition from low-cost platform-based retailers. During 2018, Inditex focused on enhancing the company’s sales footprint including opening more and larger stores combined with an integrated approach to the shopping experience based on blending store and online retail experiences. Customers can shift between retail channels combining the strengths and weaknesses of both. Between 2012 and 2018, Zara’s store sizes, on average, increased by 50%
from 1452 m² to 2184 m². The shopping experience was enhanced by the addition of new services including Click & Collect, self-service checkouts, automated online order pick-up points and same-day delivery in 12 cities and next-day in 8 markets.

Zara has been extensively studied by academics (Tokatli 2008, 2015; Tokatli and Kizilgun 2009, 2010). For Zara, it is important to read the media and academic accounts of this firm with care. It is also important to appreciate the ways in which Inditex has created a corporate narrative. In one critical reading of Zara, Tokatli argues that ‘so many observers have been getting the case of Zara wrong’ (2015, p. 642). In this account, Tokatli argues that Inditex is a global retailer that relies on thousands of suppliers all over the world and that Inditex ‘is a key driver of globalization’ (2015, p. 642) defined as being reliant on an extensive network of contract manufacturers. There is no question that Zara is a complex, successful and interesting firm. It is also a firm that plays an important role in the everyday lives of its consumers. Fashion is partly about dreams, fantasies, identities and service experiences.

Zara’s business model is based on integrating retail and online service experiences with an in-house design team, in-house manufacturing and logistics and outsourced manufacturing and logistics. The business model blends an internalization with an externalization or outsourcing strategy. This is important as Zara’s success relies on design, marketing, retailing, manufacturing, the management of a complex supply chain and logistics. Thus, its business model blends different systems together. The blend and the approach provide Zara, and the other Inditex brands, with distinct competitive advantage. Let us consider the different elements of this approach.

First, Zara employs over 700 designers (Inditex 2018). Each brand has a purchasing, sales and pattern-design team focusing on identifying new fashions and designing and developing a fashion collection. The designs mirror fashion trends in relatively real time by observing trends as they emerge in key markets. Zara tends to follow rather than to make new fashions. Zara’s designs are fabricated in its own factories and across an external supply chain. The design and fabrication processes are dynamic, focusing on creating fast fashion. Combining the in-house design team with the supply chain and logistics support enables Zara to provide its stores and online retail platforms with a continual stream of new products that arrive offline and online twice per week.

In 2018, Inditex’s design teams created over 75,000 stock keeping units (SKU). These were marketed through the stores, but also by the creation of 373 fashion stories providing customers with an audio-visual experience of a sample of the company’s products. These fashion stories are a form of virtual but carefully curated service experience combining many narrative threads to encourage consumers to appreciate the company’s new clothing designs. The design teams support a proximity-orientated manufacturing model that tries to ensure that Zara is able to design, fabricate and transfer new products to the appropriate sales channel as rapidly as possible. The supply chain in 2018 included 1866 suppliers and 7235 factories.

Second, Zara’s logistics are based on a centralized distribution model in which all products, irrespective of where they are produced, are transported to the company’s central logistics platform located in Spain. From this platform, product bundles are selected and transported to the appropriate location and sales channel. The logistics business model (see Chap. 11 on logistics) is based on the principle that the average length of time to transport merchandize from the distribution centres to a store is 36 hours for Europe and a maximum of 48 hours for Asia and the Americas. Logistics and the logistics platform play an important role in the Inditex business model. Radio-frequency identification (RFID) tags are being applied to all brands enabling each Inditex brand to track every garment in real time (see Chap. 11). RFID plays an important role in the company’s online-offline stock management system enabling customers to access products irrespective of their location.

Inditex continually innovates to remain competitive and successful and also to increase productivity. There are challenges. In June 2019,
Inditex’s Indian partner, Tata, decided to establish its own extreme fast fashion retail chain in India. Tata had managed Zara’s stores in India for nearly a decade. Tata will use the local Indian supply chain that was part of Inditex’s Indian supply chain. Hennes & Mauritz (H&M), the Swedish multinational clothing-retail company and another Zara competitor, has also negotiated contracts with two of India’s largest online retailers—Myntra and Jabong.

The Inditex business model is an excellent example of an integrated approach to developing and managing a service business based on the sale of fast fashion. This integrated approach to design and logistics, combined with localized manufacturing, enables the company to reduce its exposure to excess stock. In comparison, H&M has problems with stock control resulting in discounting that is reflected in profit margins. There is an additional problem. Inditex invested over $500 million in its stores between 2012 and 2014 whilst H&M failed to invest in its stores. The quality of Inditex’s retail space, and related service experiences, has encouraged consumers to spend more. For both these retailers, perhaps there are two major threats. First, the onward growth of discount fashion retailers including Primark and TK Maxx, which provide consumers with fashionable but competitively priced clothing. Second, online-only retailers (ASOS, Boohoo, Zalando) are able to sell fashionable clothing targeted at younger consumers for as little as £5 combined with free delivery.

Mixed marketing channels, including blending online and in-store provision, provided retailers with an ability to respond to lockdown related to Covid-19. Primark, for example, the provider of low-cost fast fashion, had focused on in-store sales but had failed to develop an online store. This meant that the company experienced a complete collapse in sales during the Covid-19 lockdown period. Nevertheless, for companies like Zara, Primark and H&M, there is another threat. This is the emergence of the slow fashion movement that is against fast fashion, and mixed material clothing, on environmental and sustainability grounds (Bryson and Vanchan 2020).

14.5 Dubai

Consumption, and consumer behaviour, is embedded in place with consumer decisions influenced by place-based associations and influences. These influences stretch between places. It is important to develop a place-based understanding or a regional understanding of service economies. It is to this that we now turn our attention. In this case, we explore a city-region as a complex service space focusing on reading Dubai as a service space that is saturated with service firms and service experiences. This case study is intended to provide an overview of a complex city-region service economy. The style of this analysis is deliberately informal and avoids the more formulaic approach that is found in most business/management case studies.

14.5.1 Unravelling the ‘Dubai Intertwingularity’: Reading the City-Regions

This is a reading of Dubai written by one of the authors of this book during an extended visit to this city-region. In this account, understanding Dubai involves both an exercise in developing an academic analysis of this city-region, and Dubai as a service experience. Let us commence a reading of Dubai. I am here in Dubai for ten days. I am an academic interested in service businesses in place and across space. As a student of place and space, it is important to experience many different places to try to understand the on-going evolution of the international economy. Most of my time in Dubai is spent in a strange solitary occupation. I am writing a book, this book. One chapter of this book, Chap. 10, will be written here rather than in Europe along with two sections of this chapter—Chap. 14. Writing is always influenced by the place in which a text is written. The chapter I am working on is exploring the internationalization of service businesses; Dubai is an excellent place to reflect on this topic and also on Dubai as a service space.

Dubai makes me think of many things. I want to explore two of these. First, how does one read
a city-region? or how to read a place like Dubai? At the centre of the analysis of city-regions is heterogeneity and a complex interplay between place, space and a concatenation of spatial and sometimes aspatial processes. A city-region also has its own special or distinctive ‘essence’ and the use of this term highlights that many aspects of a city-region cannot be measured but perhaps can only be experienced (Bryson et al. 2018). Reading a city-region is partly an exercise in trying to capture an appreciation of the essence of a place.

There is another way of considering a city-region. This is to argue that urbanization is a process that includes on-going transformations in the intensity of a place. Central to this process is the speeding up of the interconnections that exist within a place—flows of people, goods, information—combined with an ever spatially spreading web of connections to other places. Dubai is very much a place of connections—from a place that attracts leisure, business and educational tourists to the role played by Dubai International Airport as a transfer hub. Reading Dubai is an exercise in identifying and understanding a complex interconnected web of local and international flows—of people, money, information, data, goods, but set within the context of appreciating the essence of this place and its ever-changing intensity. Central to these flows, for Dubai, are flows of people. There are many such flows. Some are very temporary—from airport transfers to short holidays—and some involve much longer but still temporary visits. People pass through this place with varying degrees of intensity. There are temporary visitors who are here for a few hours as they transfer between flights, and visitors who come to Dubai to work, for education, health and tourism.

Second, in 2013, Dubai established the Dubai Knowledge Park. This place-based intervention was intended to build upon Dubai’s centrality as an important international hub. This park is a free trade zone, not for physical goods, but for people, for service workers. It is a human resource management, professional learning and educational free trade zone that specializes in providing facilities for corporate training. This is an exercise in applied integrated economic development. It attracts training providers and trainees—both generate a set of complex place-based local economic multipliers including airport landing fees and expenditure in hotels, including a hotel room tax, and in kiosks or smaller retail outlets. This Knowledge Park includes the ‘International Centre for Culinary Arts’ and the ‘Eton Institute’ (EI). The latter provides language training and assessment, including teacher training, in over 160 languages. EI has no relationship with the other Eton, Eton College (UK), apart from the shared name. The other Eton was founded in 1440 by King Henry VI as the ‘Kynge’s College of Our Ladye of Eton besyde Windesore’.

Names have many meanings—as simple identifiers but also as signs with signifiers and signifieds. A signifier is the physical form of a sign while a signified is the meaning or idea expressed by a sign (Rusten et al. 2007). Applying a name that has developed a complex signified over centuries to another activity, function or organization is an exercise in trying to transfer a signified from one organization to another. This might be accidental or be planned. It is a complex process, as it tries to link one reputation with another on the assumption that readers of this sign will appreciate the association and their decision-making will be influenced. It fails when readers do not make or understand the association or see through the exercise in sign transfer.

Place-making, city-region making, is an exercise in the creation and projection of a place-based brand or identity. Thus, the essence and intensity of Dubai is connected to the shaping of the Dubai city-region brand. This is a very complex brand that includes many interconnected layers of meaning and also involves transferring signifieds. It is also a brand that is read, interpreted and misinterpreted. This is the case for all ‘signs’; a process of translation and distortion occurs between a sign and the reader(s). This means that reading a city-region is partly an exercise in reading the ways in which a place’s brand has been developed, created and evolved, but is also interpreted and perceived. It is also important to appreciate the diversity of readings and experiences as people from very different back-
grounds try to read a place. This can be a shallow reading as people rapidly pass through a place, while for some this is an exercise in reading and engaging with a place as an exercise in everyday living.

A visit to The Dubai Mall—the second largest shopping centre in the world that is also adjacent to the tallest building and includes the Dubai Fountain, the world’s largest choreographed fountain system—is an experience in viewing and reading service experiences. This mall also includes the Dubai Dino, a genuine Diplodocus fossil, that comes from the Dana Quarry, Wyoming. US Reading city-regions is also an exercise in understanding and reading theatre. The Dubai Mall is a carefully crafted theatrical service experience. It also highlights the relationship between lifestyle and climate. Here, the mall is a place for walking, strolling, eating, entertainment—like all malls, but it is also an air-conditioned place.

This reading of Dubai as a city-region was inspired by fieldwork undertaken at the Dubai Fountain and The Dubai Mall. This initial reading of Dubai emphasized that there are many different ways to read Dubai, but all readings must include an account of theatre, spectacle and the construction of a place-based identity, a brand and a collection of linked signs. There is another way of reading Dubai. This is as a complex concatenation of flows of all types. Dubai is, if anything, at the centre of a web of interconnected flows; it is a place at the centre of a whirlwind of flows. Like all places, there are intra-city-region flows including flows of cars, lorries and buses. These flows of vehicles represent many things. At one level, they are flows of pollution producing localized air quality problems. At another level, each vehicular movement reflects a flow of people, of expertise, of information, of knowledge of employees and of families. Some vehicles are transporting raw materials—sand for construction in a sea of sand—and finished products.

A visit to the local supermarket at Silicon Oasis highlights one aspect of the complex set of global flows that link Dubai with elsewhere. A supermarket can be read in the same way that one should try to read a city. Let me take one example. A pizza was on sale; a culinary form that was developed in Italy. But this pizza is not Italian, rather more Italian-style as this is a German pizza that was ‘Made in Germany: from local and imported ingredients’. This is a German version of an Italian product transported and sold in Dubai. This is an excellent example of the geography of food and the space of flows that have evolved forming new food-related global commodity chains or global production networks. The internationalization of food that was on display partly reflects those living in Dubai from elsewhere, but it also reflects the internationalization of food.

This food example is one very narrow reading of the space of flows that is Dubai. There are more important flows than Italian-style pizza from Germany. Dubai’s economic history reflects the on-going evolution of places that are positioned as international hubs; places in which spaces of flows come together. Dubai is a ‘concatenation’ of flows. This is an understatemen of the complexity of these flows. A concatenation is a term that describes the action of linking things together in a series, or the condition of being linked in such a way. This is not Dubai, and this is not an adequate analysis of the on-going internationalization of spaces of service flows. There is a much better word. Dubai is an intertwingularity.

The term intertwingularity was introduced by Ted Nelson in a book published in 1974 on computers. In the second edition of this book he noted that hierarchical and sequential structures are often artificial (1987). Perhaps these represent the identification of ‘false’ patterns or a distorted sequential view of socio-economic-cultural-political processes. Intertwingularity is not generally emphasized as one of the primary characteristics of socio-economic processes and of the developing global economy. And, yet an international business is best described as an intertwingularity and globalization is one of the archetypical intertwinglearities. But, what does this mean? To Nelson, an intertwingularity describes the complexity of the interrelations of human knowledge. In this account, the emphasis is placed on a complex array of intertwined and
networked cross-connections of human knowledge that are intertwined. Nevertheless, intertwingularity highlights the complex weaving together of processes of all types—it is a reflection on the interconnectedness of everything. Perhaps the most complex intertwingularities emerge in the interactions between place, space and the socio-economy—interactions within and between city-regions. Reading a city-region is an exercise in unravelling and exploring intra- and inter-regional intertwingularities.

The concept of intertwingularity has not been applied in any rigorous way to city-regions. But a city-region, like Dubai, is an intertwingularity of flows, of interlinked and networked cross-connections, that link this place in complex and often unimagined ways to other places. There are many aspects to Dubai as an intertwingularity. Understanding the economic history, or economic geography, of this place is an exercise in unravelling many intertwingularities that are layered upon one another with complex interconnections. The recent history of Dubai commenced with the discovery of oil in 1966 and the development of a city-region constructed on the development of a new oil-based intertwingularity. In this case, this involved investment in oil-related infrastructure including port facilities. This transformed this place and began to alter the interconnections between Dubai and the rest of the world—a new intertwingularity emerged and evolved based on flows of people, money and oil. The word ‘evolved’ highlights that the creation of a place-based, spatially connected intertwingularity is a dynamic process.

From the mid-1990s, Dubai began to attract an inflow of foreign direct investment (FDI). An increase in oil prices provided Dubai with the finance to invest in local and international infrastructure. This was forward-thinking strategic planning based on the appreciation that Dubai’s oil stock was limited. The long-term resilience of Dubai required a transition from an economy that was constructed upon an oil-based intertwingularity to one based on flows of people, information and knowledge—an economy increasingly based on services. This was a transition from an economy based on the extraction of a liquid, to one based on the attraction and retention of people and firms. A new intertwingularity for this place had been imagined.

This new intertwingularity can be perhaps traced back to the initial decision to develop Dubai airport. This commenced in 1959 with the construction of a 1800 m runway. Dubai International Airport is now a major regional and international hub. It is the busiest airport in the world for international passenger traffic and the sixth most important cargo airport. If anything, Dubai’s current economy is constructed upon an aviation intertwingularity. Over 90,000 people are employed by the airport supporting an additional 400,000+ jobs elsewhere in the Dubai economy. An analysis of the impact of the airport on the Dubai economy is revealing. In 2013, this aviation intertwingularity contributed US$26.7 billion to the Dubai economy. This represents the airport’s ‘core’ impact that added US$16.5 billion to Dubai combined with an additional US$10.2 billion from tourism—another type of intertwingularity, but this time of tourists and related tourism infrastructure. This analysis of the airport’s economic impacts revealed that the combined economic impact of the airport was equivalent to 26.7% of Dubai’s total gross domestic product (GDP) creating 416,500 jobs or 21% of Dubai’s total employment (Oxford Economics 2014). This report attempted to look into the future. The predication was that the direct, indirect, induced and tourism gross value added (GVA) impact of aviation on Dubai will rise from 26.7% of Dubai’s GDP in 2013 to 37.5% by 2020 and to 44.7% by 2030. This is quite some aviation intertwingularity.

The aviation intertwingularity that has developed with Dubai at the centre of a complex web of people and cargo flows is the foundation for another set of service-led intertwingularities. These include a retail intertwingularity, and a leisure and entertainment intertwingularity as Dubai attracts investment in water, amusement and theme parks. There is also another process at work—the emergence and development of different forms of FDI-led intertwingularities. In 1985, Dubai established the Jebel Ali free economic zone to attract FDI. This has become the largest
free zone in the world. Building on this, Dubai has developed free economic zones across the city-region that are intended to specialize in particular activities. These include Dubai Internet City, Dubai Media City, Dubai Maritime City, Silicon Oasis and the Dubai International Academic City (DIAC). The Silicon Oasis strategy is intended to transform this place, this part of Dubai, into a major international centre for advanced electronic innovation, design and development. The free economic benefits that are available for businesses establishing at Silicon Oasis include 100% foreign ownership, 100% repatriation of capital, zero income tax, zero corporate taxation, no import or export taxes, low cost of operations and stable and clear regulations.

Dubai is an important place, it is an exciting place, it is a fascinating place. A stroll through Dubai airport represents one way of reading Dubai—as a place that is increasingly a complex intertwingularity of flows of people and money. These flows commenced with oil and then aviation. The investment in aviation infrastructure reflected the development of a new aviation-centred intertwingularity. This was the first stage in the on-going transformation of this place from desert, to oil-based economy to the complex intertwingularity of flows of people and money. Oil flows were replaced with people flows combined with flows of FDI; money and people flow together—they are intertwined. Initially, these people flows were encouraged by strategies designed to attract tourists and flows of FDI.

More recently, there has been an important addition. This has been the development of Dubai International Academic City (DIAC), launched in April 2007. This is a strategy intended to enhance this city-region’s reputation as an international higher education centre. Another form of intertwingularity is forming—an educational and research intertwingularity that is attracting universities from around the world to come to Dubai. There are three new flows linked to this initiative—of education-related FDI—money, of academics and support staff and of students. One of these flows is one that links Birmingham, UK, to Dubai, with the establishment of the University of Birmingham Dubai campus. There are other flows linked to DIAC—of ideas, knowledge and reputation. DIAC will attract students from around the world to study here. These flows of students will contribute to Dubai’s evolving intertwingularity. On graduation some may stay in this region and some will go but return eventually. Some may make decisions from afar that produce new flows of people and finance that will become embedded in this place.

The challenge is ‘how to read a city-region?’ There are many such readings—as theatre, spectacle, as a site for governance, as a place of intra- and inter-flows, as a site for work and play—of lifestyles, livelihood and liveability. Nevertheless, Dubai, if it is anything, is best understood as an evolving intertwingularity of intertwingularities. There are many different types of service space in Dubai, but perhaps some of the most visible are retail spaces and it is to these that we now turn our attention.

14.5.2 Reading the Dubai Mall: Service Spaces, Experience Spaces and Strolling Spaces

The Dubai Mall is many things—a substantial piece of real estate—for property development and investment, an engineered space, a brand, a service space, an experience space, a working space and often a comparatively low-wage space. This is quite some mall, but it is still only the second-largest mall in the world. Visiting a mall is a lesson in global flows of fast-moving consumer products—from food to cosmetics to fashion—and in people flows from across the world. Every year more than 80 million visitors stroll through this place, and in one year this was the most visited building on this planet.

This mall has 3.77 million sq. ft. of lettable space and over 1300 retail outlets including two anchor department stores, Bloomingdale’s and Galeries Lafayette. A visit to The Dubai Mall comes with opportunities for some serious shopping and eating. There are over 200 food outlets. A ten-minute stroll in each store would amount to a visit of over 10.4 days, but these are
24-hour days! But we are in luck as this mall is open from 10 am to midnight—14 hours, 7 days a week. This means my ten-minute visit to each store will take me 17.8 days, but I will need time to eat, and sleep. The Dubai Mall provides everything the mall explorer could want—from charging stations, to a porter service and a sleeping pod lounge.

There are many aspects to this mall. There is shopping, eating, strolling and entertainment. The mall includes the Dubai Aquarium & Underwater Zoo with a 270-degree walkthrough tunnel; the VR Park for virtual reality; KidZania® an ‘edutainment’ experience targeted at children; the Reel Cinemas megaplex; the Olympic-sized Dubai Ice Rink, Dino the Dinosaur and the Waterfall. The Dubai Mall is part of a much larger property development intended to attract shoppers and tourists seeking experiences. This mall is part of the large-scale, mixed-use Downtown Dubai development. This is a 2 km² development that includes the tallest building in the world, Burj Khalifa, the Dubai Fountain—the world’s largest choreographed fountain system, and The Dubai Mall. There is no question that this is a cosmopolitan place, a theatrical place, a servicescape and an experience scape.

There are many sides to Downtown Dubai. On the one hand, there is the fountain. This is a piece of America that will always be Dubai. It was designed by WET Design, the Californian company that designs water features across the US including Las Vegas. The fountain is a transposition of Las Vegas to Dubai. Alternatively, the Burj Khalifa comes alive at night with a dramatic lighting show. The lighting was designed by Jonathan Speirs, co-founder of Speirs + Major, a UK lighting design consultancy. The design of Downtown Dubai is a lesson in the internationalization of architectural and related design services, but it is also a lesson in the complex bundle of service inputs that are required to create servicescapes and service experiences. Both the fountain and the lighting show reveal another side to this place—free entertainment for all.

How do we read The Dubai Mall? Perhaps, in the same way as we read a city-region (Bryson et al. 2018), but a mall is a microcosm. It is a place that is simultaneously real and artificial, a carefully crafted and designed retail and experience space, but a private space and also a monitored space. A space of cameras—a safe and secure place. This is a place of contrasts. I strolled through the mall on a Saturday at 7 pm and again at 10 pm. There were many experiences—from the aquarium to watching ice skating. I stood by one of the entrances, waiting and watching many people—mainly couples—enter and leave this crafted space. This was a concentrated space of flows. One thing was apparent, very few strollers leaving this mall had any indication that they had shopped. But it was Saturday night. There were very few carrying shopping bags but remember that this is also an entertainment and eating place.

There are two points to consider about this place of many potential service experiences. First, retail habits are changing; visits to shopping malls are less frequent, but of longer duration and involve travel over greater distances. The retail mix within large shopping centres is changing; ten years ago, food and drink outlets would account for 5% of outlets but today developers aim for at least 20% (The Dubai Mall is over 13%). This highlights the on-going transformation of shopping centres into leisure spaces that are saturated with service experiences, or just food (Bryson and Daniels 2015).

Second, one reading of retail is about the decline of the high street and of the shopping mall as e-commerce continues to transform the retail sector. It is interesting to note that the rise and decline of the high-street shop has occurred over a relatively short time. Shops, as we know them, only emerged in the later part of the seventeenth century. Prior to this, goods were purchased from temporary stalls set up in marketplaces or from ‘shops’ without glass windows. Instead, they were protected outside working hours by window-shutters that were let down and when open, supported on posts, for the display of goods. The word ‘shop’ only emerged as a verb with the meaning of going to purchase goods in the mid-eighteenth century (1764); prior to this the term meant to expose goods for sale or a workshop. The rise of e-commerce is partly behind the shift away from shopping to consume
goods to shopping to consume service experiences. Shopping malls have become places to explore products that are then purchased online, perhaps click and collected, but too often returned.

Malls are places designed to encourage us to consume. Within the confines of The Dubai Mall, the tourist can gaze and consume a variety of different landscapes, entertainments and shops. Malls are spaces in which to see and to be seen (Bryson et al., 2004). ‘Consumers’ can enter the world of the mall and pretend that they have just shopped or are just about to shop or consume. They can gaze, stroll and be gazed upon consuming the space rather than relating to the mall as a place of consumption (Shields 1989). This is a form of resistance that implies that the psychogeographers that design malls may have been too successful. Consumers of mall space increasingly consider a mall to be a real rather than a form of artificial public space. The public street, or the square, has been translocated into a form of enclosed, private place—a private place masquerading as a public place.

Reading a mall is an exercise in reading life. Strolling through the mall are shop assistants, entertainment creators, cleaners, security guards, mall guides and couples, families, and friends; all strangers who come together to explore this very carefully designed and designer-enclosed place. The whole world comes to The Dubai Mall, but what do visitors take away? Presents, products, food and memories of service experiences; memories of a time spent in a place of theatre, a place of over 1500 shops and of Dino the Dinosaur.

14.6 Wrapping Up

This chapter has explored services through the development of an integrated approach to service business. This approach has been to identify interrelationships between different activity systems within service businesses reflecting the development of a nested-based approach to understanding service business. This is a nested approach as one business activity system depends on other activity systems. Thus, Zara functions by combining design and manufacturing with logistics and the management of a large chain of stores and related retail channels. The aim has not been to develop extremely detailed case studies as these rapidly become outdated.

The analysis has focussed on three types of cases: company, city-region and servicespace. A case study approach should always come with a caveat regarding the selection of the cases. A key question is how representative are these cases? In this chapter, the strategy has been to select very different cases. This includes manufacturing firms that have become more service-orientated to platform-based businesses. The location of the cases includes the UK, the US China, Spain and Dubai, and this was deliberate to reflect businesses from different national settings.

The initial focus was on exploring the blurring of the boundaries between manufacturing and services. On the one hand, Rolls-Royce is a high-technology manufacturing firm focused on research and development and the creation of innovative solutions to the provision of power systems. It is also a company that increasingly sells services. Thus, Roll-Royce is an excellent example of the Services Duality (Chap. 2) in which companies combine production- and product-related services. On the other hand, Flowserve highlights that all types of products can be converted into services. Industrial pumps play an important role in industrial production, but they tend to be largely invisible. There is, for example, no well-developed social science literature on the manufacture of industrial pumps.

TikTok is an important example of a Chinese social media service platform that has successfully entered Western markets. This is unusual. The TikTok case highlights some of the specificities of platform-based business models. It draws attention to how Chinese firms are able to use mergers and acquisitions to acquire resources facilitating internationalization.

Inditex highlights the interconnections between different business functions or tasks required to create service retail experiences. The analysis of one of Inditex’s subsidiaries, Zara,
engages with the discussion in Chap. 7 on the assimilation perspective and service innovation in which service innovation cannot be separated or isolated from technological innovation. Zara is simultaneously a design firm, a manufacturer, a manager of a complex external supply chain, a logistics manager, a creator of retail service experiences and a manager of online retail experiences. It is a service firm, a manufacturing company, a logistics operator as well as being a company based around data analytics.

This approach concluded with a reading of one type of complex service space—the Dubai city-region. This shifted the analysis from companies to reading city-regions. It is important to appreciate that all businesses are situated in place and that geographical location matters in many ways. Location influences products and services, but also the ways in which a firm orientates itself to national and international markets. The Dubai account highlights the complexity of city-region economies combined with an appreciation of dynamics or the evolution of regional economies.

The final case focussed on a very complex and highly designed service space—The Dubai Mall. Malls are designed to encourage consumption and are perhaps one of the most contrived service spaces on this planet. Reading The Dubai Mall places many individual service businesses in the wider context of the mall. This, The Dubai Mall, is the location for retail outlets owned by Inditex, including Zara. In September 2019, Zara opened a new flagship store in The Dubai Mall. This was the first Zara store to showcase Zara’s new shopping concept including self-service checkouts, automated collection points for online orders and a smart fitting-room management system. The Dubai Mall, if it is anything, is an excellent example of the on-going transformation of the service economy. In this case, the transformation includes a transition from the shopping mall as primarily an enclosed high street designed to encourage consumption to a theatrical space in which service experiences are co-created.

Learning Outcomes

- The limitations and advantages of a case study approach.
- The importance of adopting and developing an integrated approach to understanding service business.
- Reading city-regions as service spaces.
- Reading shopping malls as service spaces and as spaces of theatre and service experiences.
- The blurring of the boundaries between products and services.
- Platform-based service business models.
- The complexity of organizing and managing international retail service businesses.

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**Further Reading**

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**Useful Websites**

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https://www.flowserve.com/en.
https://www.rolls-royce.com/.
https://www.businessofapps.com/data/tik-tok-statistics/.
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