

# **Is context important in healthcare marketing? A comparison between developed and emerging markets**

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## **Abstract**

Context has been discussed in international business relating to marketing. We argue that understanding context is important in healthcare marketing as it deals with a complex issue of human health and comfort. This paper explores how service providers confront with contextual complexity and deal with marketing of healthcare services in developed and emerging markets. Four case studies have been conducted on a Swedish multinational firm operating in two developed and two emerging markets. By applying a qualitative method, data was collected through interviews, observations and secondary materials like annual reports and firm documents. A theoretical framework based on context, trust and network has been used to conduct the study. Operations in both developed and emerging markets emphasized individual and organizational trust but country level trust was only recognized in the emerging markets. In the developed market, the local customers emphasized on the written agreements. In contrast, emerging market customers put emphasis on informal relationship and considered agreements more as guidelines. Network development was highlighted in both developed and emerging markets to get competence and access to right partners.

## **Introduction**

Role of context in business has been widely discussed in literature relating to both developed and emerging markets. Sheth (2011) argues that context matters in international business as countries differ in adopting marketing perspectives and practices. Akaka et al (2013) observe that in value creation across countries, the multiplicity of institutions and cultural aspects of context become prominent. Cultural context is usually seen as a major obstacle in international business and therefore efforts are made to map the impact of culture and how to deal with it by developing relationships and networks in the local market (Hofstede et al. 2010). Conditions of financial institutions and political environment have also substantial impact on business depending on the growth of the market (Sheth 2011). The researchers usually do not differentiate between developed and emerging markets while discussing context, but there is an overflow of context studies in emerging markets due to the belief that different external factors in those markets have large impact on business process (Burgess and Steenkamp 2013). This observation raises an important question how the same multinational treats developed and emerging markets together in dealing with different contextual issues in these markets.

Hyder and Fregidou-Malama (2009) have observed that international healthcare marketing confronts with delivery of service complexity and a context, which is unknown and remains beyond control. Healthcare is a professional service that deals with a sick customer (Berry and Bendapuri 2007) who always is not in a position to judge the quality of the service or even articulate the trouble the patient goes through. Service characteristics, i.e. intangibility, inseparability, heterogeneity and perishability add complexity to the service making the marketer's roll difficult. Marketing of healthcare in developed and emerging markets pose diverse challenges for multinational companies to adapt to different conditions. To our knowledge, no study has yet compared how healthcare is marketed in developed and emerging markets. This study thus defies with service characteristics, healthcare complexity and applying a comparative approach for handling different contexts. Given these challenges, this paper explores how service providers confronts with contextual complexity and deal with marketing of healthcare services in developed and emerging markets.

Freeman and Sandwell (2008) highlight the role of network of relationships for professional service firms to enter emerging markets. By developing relationship, firms get interconnected with different actors to come across vital resources. Every company acts in a context that includes multiple interdependencies between companies as well as between their resources and activities around relationships (Håkansson and Snehota 2017). To manage interdependencies, buyers and sellers need to collaborate and trust each other. Gilson (2006) recognizes that in healthcare, trust is embedded in inter-personal and organizational relationships. Zaheer and Zaheer (2006) also find a connection between

trust and networks to reduce uncertainty and risk involved in marketing of professional services. By combining trust and network, we address two research questions in this paper.

- How does healthcare marketing takes place in developed and emerging markets?
- How do trust and networks support healthcare marketing in developed and emerging markets?

This study is conducted on four associated companies of the Swedish multinational, Elekta, operating in the field of healthcare. The companies are located in Germany, Spain, Brazil and Egypt.

## **Theoretical framework/background**

### ***Role of context***

The researchers have highlighted different aspects of context including politics, society, economy and culture in dealing with market entry and conducting business (Akaka et al., 2013; Sheth, 2011). Political stability is an important factor in emerging markets. Karabag (2018) observed that political instability made Turkey unfavorable market for long-term business activities and hampered risk-taking initiatives. Roting (2016) find that emerging markets have unique institutional features compared to developed markets including institutional voids (i.e. lack or underdevelopment of certain institutions), relative importance of informal compared to formal institutions, institutional pressures by governments, as well as institutional change and transitions. Dawar and Chattopadhyay (2002) have identified two sources of variability in EMs: income and infrastructure. Income variability relates to low incomes and income flow, i.e. daily/weekly/monthly payments. Infrastructural variability is connected to transportation, telecommunications, power and financial issues. Hofstede et al (2010) in his studies largely found that there are some basic cultural differences between developed and emerging markets.

Research in emerging markets has been conducted on strategies related to consumer and industrial good industries (Cassia and Magno, 2015) without giving much attention to the service sector. Major gross domestic product of developed countries originates from service-related activities. Researchers have long been argued that services are different from goods and suggest own strategies in dealing with services marketing (Zeithaml et al 2006). From this viewpoint firms dealing with context in developed and emerging are likely to be different.

### ***Role of trust***

Trust is defined as the willingness to rely on an exchange partner one has confidence in (Bianchi and Saleh, 2010). Fregidou-Malama and Hyder (2015) have identified three levels of trust, i.e. country, company, and individual, to deal with challenges in healthcare. Country level trust is related to the country of origin of the foreign service provider. If the country has a reputation, it confers initial trust in the local market. Company level trust occurs when the customers and employees rely on the competence and sincerity of the organization. Individual trust is created through interaction between employees and customers. Country level trust is the starting point of trust development process and how it succeeds depend on how individuals deal with each other. Trust can enhance long-term business relationships (Håkansson and Snehota, 2017).

### ***Network***

Johanson and Vahlne (1990) define business networks as sets of connected business relationships. Elg *et al.* (2008) have shown how networks with different stakeholders contribute to a firm's understanding of a new market. The dynamics of network relationships can be understood by recognizing critical actors, activities, and resources and analyzing their role within an exchange (Cova and Salle, 2000). Håkansson and Snehota (2017) argue that firms are dependent on resources provided by other firms, and this exchange of resources advances knowledge, helping them to develop trust and relationships and gain a position in the market. These authors further combine cultural issues together with trust and networks and argue that knowledge to overcome cultural differences is required to build trust and network in international business.

## **Methodology**

This study discusses two complexities: healthcare marketing and dealing with different contexts. Further, the contexts include both developed and emerging markets, which are different particularly in relation to culture and economical conditions. A thorough investigation is required to understand how marketing process is organized and function by dealing with different contextual issues. Developing

trust and networking in real life context makes it important for our study to gather knowledge on how they work and relate to the marketing process in different markets. When research effort like this involves knowledge generation and a holistic perspective, a case study method is appropriate to use (Yin, 2014). By applying a case study method, four cases on Elekta, a high-tech Swedish multinational engaged in healthcare, have been conducted in this study. Two cases from Germany and Spain represent the developed market while cases from Egypt and Brazil belong to the emerging market.

Considering the in-depth nature of the research, semi-structured interviews were mainly conducted with Swedish and local employees of the host countries. Face-to-face interviews were conducted in most of the cases. We altogether interviewed 36 employees from Germany, Spain, Brazil, Egypt and Sweden. Among the interviewees 10 came from the Swedish headquarters and 26 people belonged to the selected Elekta affiliates in the four countries. Further to the interviews, company documents, annual reports and magazines were consulted to complement, and verify the data.

The data was physically coded by the two researchers who conducted this study. Most of the interviews were done in English. Some interviews were conducted in German and Spanish by the natives who later transcribed the data in English. The German and Spanish interviewers are business graduates and they knew well the purpose and requirement of the study. For the analysis, we prepared four cases by following the theoretical framework of the study. Next step was to find themes and categorize the findings under each theme. Data was then compared at two phases, first between the cases and second between the country categories by combining cases under developed and emerging markets respectively. These two level comparisons gave us valuable insight on the Elekta operations and the differences between the countries and the market categories.

## **The multinational and the associated companies**

### ***The multinational: Elekta***

Elekta with its headquarter in Stockholm is a global actor in the field of healthcare. The company develops and markets clinical solutions for the treatment of cancer and brain diseases. It concentrates on treatment solutions and oncology informatics portfolios to increase the delivery of radiation therapy, radiosurgery and brachytherapy. It is the leading innovator within radiation therapy with some 40% global market share. Elekta's products are sold in more than 120 countries and it has installed base of 3900 treatment systems. According to Elekta Annual report 2016/17, it has 3600 employees around the world and almost 1.5 million patients are treated with Elekta's treatment systems each year.

### ***Elekta Germany***

Germany was one of the main foreign markets, which Elekta found important for its international expansion. In 1997, Elekta Germany was established in Humburg by acquiring a part of Philips medical systems with a team of 45-50 employees working in the country. The local subsidiary works with a number of branches spread over Germany. Elekta worked before through distributors but decided to enter the market directly partly for its closeness and presence of highly developed oncology research in the country. However the company faced tough competition in the beginning from Simens who was also the market leader in oncology. Elekta Germany works almost as an independent company, only polices and main strategies come from Stockholm. The customers in general are quality conscious and stress on maintaining high standard of technology, technological support and after sales services.

### ***Elekta Spain***

Like in other markets, Spain was initially served by a distributor. The contact person from Sweden had close contact with the local market and asked for own establishment in the country to develop close contact with the potential buyers. To fulfill this aim, Elekta took over Phillips and its employees. Elekta was thus capable to avoid to start from the scratch but had people who knew the market and the necessary contacts. By establishing the local subsidiary, Elekta was looking to set up their own values on staying close to the customers and supporting them. To highlight the change, Elekta let the former country manager of Philips go and appointed a new manager to represent the company.

### ***Elekta Brazil***

Elekta established an own subsidiary in Brazil in 1998 to serve the Brazilian and other Latin American markets. The market was previously served by a Spanish representative which proved to be insufficient

to cover the region. The new establishment was necessary for several reasons including growing size of the Brazilian market, inability to provide customer support from a long distance, pressure from an American competitor who was directly operating in the market and lack of communication between the Spanish representative and the local customers. Elekta Brazil operated in the other markets in Latin America through distributors who were in regular contact with the Brazilian office. Elekta Brazil had both public and private customers. The government hospitals financed the investment by totally government fund while private customers had to adopt different financial arrangements where the machines and Elekta Brazil had to provide guarantee for the loans.

### ***Elekta Egypt***

In 1999, Gamma knife centre was established in Cairo as a joint venture between Sweden and Egypt to treat brain tumors with radiotherapy. The company is located at the premise of semi-government hospital. The purpose of this center was to provide high quality treatment to the local people who usually sought treatment in other countries at that time. The first patient was treated in 2001 and the centre succeeded to give treatment to 3000 patients by 2010 (Gamma Bulletin, 2011). Initially it was very important to create trust on the treatment as the concept was new in the region. The company started with a Gamma knife model which was replaced by a modern radiosurgery system, known as Leksell Gamma Knife Perfexion in 2012. This new technological solution streamlines workflow and expands treatable volume through an automated, multi-source collimator to offer more precision in the treatment.

## **Findings**

### ***Role of context***

In Germany, dealing with the government organizations goes slowly due to formal and hierarchical structure of the organizations (Table 1). In Elekta Germany, the procedure is less formal, which makes the communication easier to serve the market quickly. This is positive as the local customers can reach the higher authority of the company if needed. The local customers is heavily interested in technological improvement and training. The quality of the service is a major requirement for the local customers. In Spain, local culture is very important in doing business. Elekta Sweden was well concerned to this issue. Before the establishment in the country, Elekta Sweden served the market through distributor to be in touch with the market. When it entered, it kept mind the role of culture and took over a part of the Phillips, which was run by the local people. One executive said that, “you cannot succeed in the Spanish market unless you are involved in the Spanish culture and values”.

**Table 1. Role of context**

CONTEXT	DEVELOPED MARETS		EMERGING MARKETS	
	<b>E-Germany</b>	<b>E-Spain</b>	<b>E-Brazil</b>	<b>E-Egypt</b>
<b>Culture</b>	Hierarchy, Formal, takes time to reach the decision maker individualistic, quality conscious,	Formal contract necessary, respecting local culture and language appreciated	Language vital, Formal & informal aspects, Time not maintained	Respect to elders and traditions, family involvement important
<b>Social and economy</b>	Highly competitive market	Formal and social values	High employee turnover	Low income people, high cost
<b>Government, law and regulations</b>	Tender driven market, slow decision making in government hospitals	Both written documents and oral commitments vital	Hospitals run by government fund	Bureaucracy, government support necessary
<b>Financing</b>	Price sensitive, private hospitals act quickly,	Price important,	Longer sales process, private dealing costly	Long que, private treatment costly,

Language is a big issue in Brazil as local people do not usually speak in other language. To solve this issue Elekta Brazil hired local people to easily communicate with customers. This factor was particularly discovered when the Spanish speaking representative failed to make a good impression in the local market. There are both government and private customers. Usually the public hospitals invest huge

money in the field but they have to depend on the government funding. The local market is expanding which requires Elekta Brazil to invest more in employees and increase contact time with the customers to provide continuous technical support and training. In Egyptian market, knowing key people and good references are vital. The hierarchical structure in the society is strong and has to be maintained. Elekta Egypt considers people according to their status and respect the local tradition while dealing with their customers, employees and patients. Creating a homely atmosphere and offering a good quality service is important for the company. Except in the government hospitals, the cancer treatment is costly compared to the low income of the people. In the government hospital, patients have to wait long to get the treatment.

### ***Role of trust***

For the German customers quality is the first and foremost requirement (Table 2). The customers feel that Elekta has a good product but they are not good enough in marketing compared to the other firms. Elekta Germany is doing well and the customers want them to improve service and workflow further. Swedish quality or country of origin is not considered important for the customers. They think it is important how machines and software work and how quickly they get technical support when needed.

**Table 2. Trust at different levels**

	DEVELOPED MARKETS		EMERGING MARKETS	
TRUST	E-Germany	E-Spain	E-Brazil	E-Egypt
<b>Individual level trust</b>	Competence, professionalism, on time delivery	Personal contact, showing emotion, knowing the person	Respect, democracy, competence, local language, collectivism	Respect, individual responsibility, collectivism
<b>Company level trust</b>	Technical support, slow service flow, high quality demanded, relationship	Training, keeping promises, regular customer support, relationship, early experience matters	Product quality, customer service, Training program, long-term relationship	Teamwork, customer service, training, long-term relationship
<b>Country level trust</b>	Swedish branding not important,	Nordic image positive but not enough, notion of respect,	Swedish technology, Swedish brand, local people at top positions	Swedish technology, Swedish brand, collaboration with university

In Spain, no business is possible without trust. The locals demand that Elekta Spain has close relationship with the key leaders of each hospital where the business comes from. Spanish customers like a warm approach before and after the sales. The customers seek trust and quality in buying Elekta instruments. They need details of the agreements for future contacts and building trust. Personal contact and trust are needed to solve immediate problems. Personal relationship is complementary to the formal document. Elekta Spain adopted a new culture after taking over Philipps for developing awareness of Swedish quality. But Sweden as a country did not have much impact on the customers.

Elekta Brazil concentrates on building personal contact with customers and the government officials responsible for policy making and public funding. It is important that local market has confidence on the company. Elekta Brazil provides two types of training to the customers: on the spot support through a local Elekta team and training in Elekta centers outside Brazil. The company selectively recruit people who are respected and know the market. “Brand Sweden” has special value in Brazil and seen as a sign of quality. A general conception is that Sweden supports the local country by introducing an important technology in the field of healthcare. In Egypt local respecting local tradition and becoming a part of the society is highly valued. Elekta Egypt highlights the local values by allowing relatives to get involved in the treatment process, supporting local medical students and considering people on the basis of their age, position and experience. It is important for the company to develop long-term relationship with the customers and the government authorities. The Swedish quality is highly regarded in the

country and is well reflected by the establishment of a joint venture in Egypt. Elekta Egypt puts effort to keep promises and help the local government to improve its medical policy and healthcare services.

### **Networking**

German customers highlight relationship building for getting continuous support from the company. The market is demanding and also the competition is high. In every year there is an oncology conference in Germany where Elekta Germany and the customers participate. It helps both the parties to know where they are in the development process. The German customers stress on closeness and therefore the company has a specialist to serve, particularly the big customers, on a continuous basis. In general, Elekta Germany publishes regular newsletters to keep the customers informed about their activities and future planning. Elekta Spain organizes customer meetings, congresses and special Elekta events. In the events, customers and the company personnel meet in an informal way to develop relationship and receive spontaneous feedback from the customers. Life-long customer, signing contract, sales users meeting are the common practices used in the Spanish market. Elekta Spain has developed a support system, which helps to quickly sort out customers' problems with the equipment and the operation. There have been some initial problems but the company has gradually dealt with them through open dialog. By changing the Spanish distributor, Elekta Brazil started to develop contacts with the potential buyers. Considering the growing Brazilian market the company has developed a team of efficient local employees who have already good contact with the local market. Particularly, a top executive of the competitor was hired to deal with the policy makers and public funding authorities. The customers were offered on the spot service and had the possibility to attend Elekta organized conferences and international training programs. The local training network includes cancer centers and Sao Paulo state university. On the other hand, Elekta Egypt has developed a network of relationships with government officials and local universities, and allowed doctoral students to be a part of their development process. The company offers medical students supervision which also helps them to recruit good candidates. Local references are highly valued in Egypt and therefore developing informal contacts is an important work for the local employees. Being a joint venture, Elekta Egypt has a local support and a local identity.

### **Case comparison**

Using local language for communication and marketing was a necessity in all the countries and therefore recruitment of locals was stressed. Price sensitiveness was common. Trust development was important in both the markets due to long-term nature of healthcare and costly equipment. Trust was cultivated throughout to ensure that customers' reliance on Elekta products and services. Another common issue was the emphasis on individual and organizational trust. Quality of the services was a priority in all the cases. Decision making in all the cases was a function of the top level. Network development was highlighted in both the markets to get competence and access to right partners.

In the developed countries, the customers emphasized on the written agreements (Table 3).

**Table 3. Major differences in operations between developed and emerging markets**

MAJOR ISSUES	DEVELOPED MARKETS	EMERGING MARKETS
Context	<ul style="list-style-type: none"> <li>▪ Both formal and informal relationship stressed</li> <li>▪ Private funding dominating</li> <li>▪ Private and public treatment goes parallel</li> <li>▪ Less price sensitive when quality is concerned</li> </ul>	<ul style="list-style-type: none"> <li>▪ Informal relationship is the focus</li> <li>▪ Public funding dominating</li> <li>▪ Few people under private treatment</li> <li>▪ Price sensitive</li> </ul>
Trust	<ul style="list-style-type: none"> <li>▪ Individual and organizational trust identified</li> <li>▪ Profession related trust</li> </ul>	<ul style="list-style-type: none"> <li>▪ All three levels of trust found manifested</li> <li>▪ Overall trust</li> </ul>
Network	<ul style="list-style-type: none"> <li>▪ Connected with more foreign conferences</li> <li>▪ More foreign training</li> <li>▪ Networking for business and quality maintenance</li> </ul>	<ul style="list-style-type: none"> <li>▪ Connected with local universities</li> <li>▪ More training on the spot by the local experts</li> <li>▪ Networking for government support</li> </ul>

In contrast, Egyptian customers put emphasis on informal relationship and considered agreements more as guidelines. This view was shared by the Brazilian customers, who also valued formal parts of the negotiations. Country level trust was only recognized in the emerging markets. In these countries, Swedish reputation for neutrality and quality was considered important and incorporated in the marketing strategy. To solve initial uncertainty, customers in Germany and Spain relied on the references and early experience. Closeness of Germany to Sweden was taken positively the customers as they had similar business and cultural context. Competitiveness was high in the developed countries and therefore the Swedish firm had to continuously develop contact and be sure that quality was delivered. In the emerging markets, competition was comparatively weak but the Swedish firm had to engage more resources to deal with the political context and ensuring public health funding.

## **Conclusions**

Cultural and political contexts are found important but they expose differently in two categories of markets. One important difference is observed in connection with the levels of trust. The developed market companies put more emphasis on how individual and organizational trust interact and develop, no country level trust occurs. In contrast, country level trust is highly important for the emerging market customers as they have little information on the foreign company and thus have to pursue other sources of trust. Trust initiation process starts with the reputation of the foreign country while this issue is solved in the developed market through references and experiences. Another important difference observed is the type of relationship preferred in the respective markets. We have found that informal relationship in the emerging market must work before and after getting involved in the business. To understand and deal with local emotions and feelings, the local employees have been given the responsibility. It is not unexpected that developed market customers rely on formal contracts but they also stress on personal contacts considering the long-term involvement in healthcare sector. This study also shows that public customers like government hospitals are highly influential in emerging markets compared to the other market category where both private and public customers are active.

Concerning limitation, only two countries from each market is not enough to say about that market. However, the purpose was not generalization rather to understand the process. Another limitation is the ownership, three Elekta owned subsidiaries versus one joint venture have been studied. It could be more joint ventures to observe the interaction. In this study, we have considered the process of marketing, a new study can deal with developing marketing strategies for healthcare. A such research is needed comprising only emerging nations or BRICS (Brazil, Russia, India, China and South Africa), where need for modern healthcare is growing. Another research can examine whether country level trust is also important in other emerging markets. As practical implications, international managers can understand and use the knowledge of context while working in different environments. Identifying right level of trust is vital while considering the characteristics of the market.

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