Volume 17 • Issue 4 • 2025

received: 25 November 2024
accepted: 1 Septemver 2025

pages: 52-68

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Navigating servitisation in the GCC fashion sector: a comprehensive assessment of status and barriers

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ABSTRACT
This study aims to evaluate the current level of servitisation in the Gulf Cooperation Council (GCC) markets in the fashion sector and identify various internal and external obstacles that may hinder fashion organisations in the GCC region from fully adopting the servitisation strategy. An exploratory methodology was employed, using a qualitative approach with semi-structured interviews on a purposive sample. The study reveals that the implementation of the servitisation strategy in GCC is in its initial stages. While evidence of the dimensions underlying such a strategy was found, they were not employed and linked as suggested in the literature to generate the required results. Additionally, non-transparent and limited relationships with partners and unskilled employees were identified as the main barriers preventing fashion agents from fully embracing servitisation in the GCC fashion sector. This study uniquely explores servitisation in the GCC fashion sector, filling a significant gap in existing research that has largely overlooked this region and industry. Unlike previous works that broadly address servitisation in manufacturing, this paper delves into the specific challenges and adoption levels within the GCC's culturally and economically distinct context. By offering nuanced insights from senior managers in leading fashion organisations, it provides valuable empirical evidence and practical implications for both academia and industry, marking a notable contribution to the literature on servitisation strategies in emerging markets.

KEY WORDS
product service system, service implementation barriers, performance measurement, supplier relationship, luxury products

10.2478/emj-2025-0026

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Introduction

The shift in focus of manufacturing organisations to deliver services alongside their products has become highly descriptive, replicating state-of-the-art practices in global production and consumption/usage trends (Pigosso & McAloone, 2016; Jaiswal & Ha-Brookshire, 2020; Zhao & Wang, 2021). This strategic transformation, referred to as the product-service system or "servitisation", delivers value to customers and follows the evolution of the manufacturing sector (Kozlowska, 2020; Zebardast et al., 2014). Servitisation is adopted by manufacturing

Al-Abdallah, G. & Al Haj Eid, M. (2025). Navigating servitisation in the GCC fashion sector: a comprehensive assessment of status and barriers. *Engineering Management in Production and Services, 17*(4), 52-68. doi: 10.2478/emj-2025-0026

organisations for many economic, strategic and environmental reasons (Buics & Eisingerné Balassa, 2020). These include competition from low-cost producers in developing countries and lacklustre domestic demand, given that products in these sectors are often oversupplied (Kozłowska, 2020). This situation creates a demand for advanced servitisation strategies to differentiate and maintain customer loyalty (Nguyen et al., 2022). However, previous studies also show that creating an appropriate environment is very important to servitisation adoption (Baines & Lightfoot, 2014; Liu et al., 2022). As such, the requirement for contextual alignment has made the delivery of successful servitisation strategies more complex (Kaňovská & Vlčková, 2022).

Thanks to the high purchasing power of consumers and an attractive consumerist culture, the Gulf Cooperation Council (GCC) region is a promising market for many organisations and a lucrative ground for bringing new product ideas to life. The GCC market, formed in 1981 and comprising six Arab monarchies - Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates - is primarily based on oil revenues; however, it has expanded across sectors. Furthermore, this economic wealth has drawn different international companies to this large-scale, tax-free market (Elbanna et al., 2020). However, certain industries had to adapt their products to the needs of the local GCC market. As a case in point, large shopping malls cater to local residents and expatriates living and working in the region. While these respective regulations and practices continue to shape the management style of retail fashion in the region, demanding adjustments to be made concerning the culture and values of the area, at the same time, tremendous economic power due to petrodollar-based globalisation and becoming a part of the world economy has attracted Western investors from other major markets, resulting towards radical societal changes. Such changes have been further backed by regional politicians and social elites who champion the ideals of modernity and embrace Western-style life. This shift has favourably impacted the fashion sector, with numerous brands expanding their presence within and beyond the GCC (Semaan et al., 2019). However, the unique cultural, regulatory, and economic landscape of the GCC significantly influences business practices within the fashion sector. Understanding these elements, including consumer behaviour, regulatory changes, and cultural norms, will offer richer insights into the specific challenges and opportunities for servitisation, enabling fashion businesses to tailor their strategies more effectively to the regional context.

In the Middle East, Arab consumers reportedly spent USD 89 billion on fashion in 2023, with a projected compound annual growth rate of 7% from 2023 to 2027 (Business of Fashion Insights, 2023). The GCC markets alone accounted for USD 50 billion in annual fashion sales, highlighting the region's substantial economic impact. Notably, Saudi Arabia and the United Arab Emirates rank among the highest per capita expenditures globally, at approximately USD 500 and USD 1,600 per person, respectively (Amed et al., 2020). Several regional retail conglomerates underpin the success of the consumer fashion sector in Gulf countries. The GCC is one of the leading markets for high-end (luxury) fashion brands (Husain et al., 2022), especially in Saudi Arabia and the United Arab Emirates, where the high-end fashion market is proliferating (Ramadan & Nsouli, 2022). For instance, the Kuwaiti retailer Al Shaya has introduced over 90 brands to the region, including H&M and Boots. Similarly, Fawaz Al Hokair, operating in the KSA and the broader region, has brought numerous high-street brands, such as Zara, Bershka, Aldo, and La Senza. Other significant contributors include the Apparel Group and the Chalhoub Group (Awad, 2018). The internationalisation process from an international marketing perspective, as in the case of Zara, is not new (Lopez & Fan, 2009). However, with increased competition, customer preferences and needs continually evolve as they demand greater value, diversity, transparency, and immediate satisfaction (Al-Abdallah & Bataineh, 2018), highlighting the importance of servitisation in the study context.

Research on servitisation is often considered universally applicable across manufacturing sectors and operating environments (Kaňovská & Vlčková, 2022; Raddats et al., 2019), a perspective of crucial relevance to this study. Consequently, the servitisation strategy holds considerable promise for the fashion industry, as it caters to unique customers seeking quality service evidence in such markets. The adoption of servitisation strategy in the fashion sector is accelerating as a means to enhance quality, reduce costs, improve time efficiency, and promote better sustainability (Galera-Zarco & Campos, 2021); servitisation positively influences perceived quality and positively affects purchase intentions (Tosun & Tosun, 2023) leading to better economic performance as indicated by sales growth and profitability (Johansson et al., 2019). While servitisation has been examined across various industries, such as manufacturing and technology sectors (Huang, 2022; Luo et al., 2023), a notable research gap remains concerning its application and effectiveness across different industries and countries (Pal, 2016), including regional markets like the GCC. Despite the critical role of the fashion sector in the GCC, research on servitisation strategies, especially within organisations that represent significant names in the GCC fashion industry, has been minimal. Studies, such as those by Mutwalli et al. (2015) on servitisation provision in the Saudi public hospital sector, Durugbo et al. (2021) on servitisation in supply chain management in the GCC, and Zahoor et al. (2023) on the concept of servitisation in SMEs in the UAE, are only examples found on servitisation in the GCC.

Moreover, according to Brunet et al. (2017), academic development and empirical testing are relatively rare in high-end fashion. Accordingly, this study aims to bridge this gap by empirically investigating the servitisation activities of regional firms in the dynamic business environments of the GCC fashion markets. Furthermore, this research responds to the call by Lee et al. (2021) for more precise research to capture the conceptual framework of servitisation. The proposed servitisation framework drafted by Baines and Lightfoot (2014) encompasses six dimensions: facilities and their locations, micro-vertical integration and supplier relationships, information and communication technologies, performance measurement and value demonstration, people deployment and their skills, and business processes and customer relationships. Furthermore, this study seeks to investigate not only the current level of servitisation in the GCC fashion industry but also to identify any obstacles that might impede or prevent fashion entities in the GCC from adopting servitisation practices.

This work contributes to the literature in the following three ways: first, regional focus: previous research has concentrated on servitisation in Western manufacturing (i.e., Baines & Lightfoot, 2014) or SMEs (i.e., Zahoor et al., 2023); the present study is the first to empirically study servitisation within a GCC fashion market, which is influenced by distinct cultural, regulatory and economic factors (e.g., visa regulations and consumerism of luxury). Second, sectoral novelty: distinct from broader servitisation scholarship (Raddats et al., 2019), the authors explore how issues in fashion (e.g., rapid turnover of Arabic-speaking staff and supplier mistrust in IP-sensitive collaboration) inhibit adoption. Finally, a managerial framework has been designed, tailored to Baines and Lightfoot's (2014) six servitisation aspects to fit the GCC context and to show how they interact with regional obstacles (e.g., micro-vertical integration is inhibited by hierarchical decision-making).

As GCC economies continue to grow, understanding the implications of servitisation in the fashion sector is vital for industry practitioners and policymakers alike, offering opportunities to enhance business practices, customer satisfaction, and overall economic growth in the region. Consequently, the study is guided by the following research questions:

RQ 1: What is the current level of servitisation in the GCC markets within the fashion sector?

RQ 2: What obstacles might hinder servitisation adoption for fashion agents in GCC markets?

Using the methodological strategy outlined by Yin (2018), this study presents an extended investigation into how strategy is implemented within particular organisational settings. Bedside drivers and barriers will be explored, and comparative analyses will assess how firms navigate the wide-ranging territories of servitisation in GCC, based on varying cultural, regulatory, and economic contexts within the region.

1. Literature review

1.1. Concept of servitisation

Servitisation is one of the fundamental phenomena that describes how organisations (particularly manufacturing industries) are transforming to cope with the global economy and gain a competitive edge (Turovets & Vishnevskiy, 2019). This strategy means complementing products with new service offerings and moving the competition from product price to customer value by providing complete solutions to better fulfil customer needs and at a lower cost (Raddats et al., 2019). The move to servitisation calls for manufacturers to have more than a production-oriented functional focus that responds to problems with more involvement in the business ecosystem (Słowik & Sierocka, 2023). Research on servitisation has started to encompass operational management and, more recently, a supply network perspective (Raddats et al., 2019).

Newer research investigates the servitisation process implemented in different sectors, even identifying what motivated organisations to pursue servitisation (Kaňovská, 2020). These drivers include advanced service provision over cost competition to gain a competitive advantage, developing resilient revenue streams, and a more efficient and responsive fulfilment to customer and market needs, resulting in a higher satisfaction level (Aurich et al., 2010; Baines & Lightfoot, 2014; Zebardast et al., 2014; Pigosso & McAloone, 2016; Raddats et al., 2019; Hänninen et al., 2020; Kozlowska, 2020). Implementing servitisation requires practices and technologies unique to the industry's type, size, and nature. In light of this, the work by Baines and Lightfoot (2014) set out to assess contemporary practices and technologies among organisations known to have successfully adopted servitisation, along with their implications for success; from that, they identified six core dimensions necessary for effective implementation. The current servitisation strategies may be best assessed in terms of these dimensions: facilities and locations, micro-vertical integration and supplier relationships, information and communication technologies, performance measurement and value demonstration, people deployment and their skills, and business processes and customer relationships. Dimensions that are often used to explore and quantify the reality of this servitisation strategy in the literature (e.g., Baik et al., 2019; Jagstedt & Persson, 2019; Huang et al., 2020; Mola et al., 2020; Shen et al., 2023).

Existing research on servitisation is mainly underpinned by universalism, and its application universally across sectors is discussed in relevant research (Kaňovská & Vlčková, 2022; Lederer & Miric, 2016). Yet this research challenges that assumption, given that GCC fashion firms are confronted with cultural-regulatory barriers (e.g., visa restrictions on skilled labour or a mall typology as a norm). Supplier dynamics and tech adoption paradoxes are substantial barriers that must be examined. Therefore, this paper will apply such dimensions to define and measure servitisation in fashion from a GCC perspective, with each mentioned dimension elaborated below. By contextualising servitisation within the fashion sector of Gulf Cooperation Council nations, the aim is to make several contributions. The authors seek to extend existing theoretical frameworks by applying the dimensions Baines and Lightfoot (2014) established to a region characterised by high labour mobility and less rigid supplier hierarchies. In so doing, the authors hope to disrupt typical integration models. Additionally, barriers have been identified in this industry and locale that have not been documented in other contexts, such as manufacturing or healthcare. Issues, including high employee turnover rates and linguistic divides, represent challenges unique to this economic and social environment. Finally, an action-oriented solution has been tailored to Gulf firms.

1.2. Facilities and their locations

A significant element of delivering advanced services is how closely the manufacturer works with the customer. Such immediacy can be achieved by setting up maintenance or repair facilities or service centres near customers (Ryu et al., 2020). The importance of this practice for successful servitisation is highlighted by Baines and Lightfoot (2014), who argued that the presence at the customer site with trained manufacturer personnel offers rapid diagnostics and fault repair. In doing so, the manufacturer is better able to create and sustain deep, long-term relationships with their customers, supporting daily relations and operations, thereby enhancing customer trust and loyalty.

Moreover, according to Chen et al. (2014), manufacturers consider access to and insights into markets, products, and customs as strategic drivers influencing their location decisions. This knowledge enables an optimised global network of service centres that support the needs of customers and suppliers (Lica et al., 2021). The primary focus is on balancing efficiency, effectiveness, costs, and time (Macchion & Fornasiero, 2021). In the fashion sector, this dimension can be observed in nearby centres for fashion retailers that support the implementation of new systems and technologies and are qualified to train employees across various departments within a business unit.

1.3. Micro-vertical integration and supplier relationships

Production is the key component of vertical integration and an essential strategy for manufacturers to control the processes, innovate better, and improve economic performance (Wadeson, 2017). Backwards and forward integration in an industry (Baines & Lightfoot, 2014) - where an organisation extends its operations into areas previously managed by upstream suppliers (backward integration) and downstream customers (forward integration) - enables it to cover more steps in the production and distribution value chain. The extent of vertical integration can vary across manufacturers due to inherent industry differences, such as product lifecycle duration, economies of scale, technological advancement, and market imperfections (Huang & Liu, 2014). For serviced manufacturers, micro-vertical integration necessitates an extended presence to seamlessly integrate with business units in both the upstream and downstream directions (Hänninen et al., 2019). Furthermore, supplier relationship management is essential for manufacturing companies in the current dynamic and competitive marketplace. As with any relationship management, the buyer-supplier relationship is influenced by satisfaction's affective and cognitive dimensions (Wu et al., 2023). It enables an efficient and sustainable supply chain with frequent, reliable deliveries (Al Haj Eid & Al-Abdallah, 2024). However, for purchasing and supplying entities to effectively enjoy this kind of relationship and in the long term, they should offer mutual benefits, which highlights the desirability of collaboration between both manufacturers and suppliers at the strategic level (Alabdallah et al., 2014; Haq et al., 2023). This planned approach goes beyond fulfilling the operational requirements of the manufacturer and builds resilience in the complete supply chain, helping to achieve success for the entire servitisation strategy. Such integration is evident in the clothing industry and is one of the main foundations of a successful bond between manufacturers and retailers.

1.4. Information and communication technologies

Information technology (IT), or, more broadly, information and communications technology (ICT), is at the heart of nearly every modern manufacturing and service-delivery system. These technologies enable organisations to combine various hardware and software elements into a single system. This type of connectedness enables efficient connections between suppliers, partners and consumers within a country and across borders (Wendt et al., 2021). ICT tools play a vital role in distributing value-added services, thereby overcoming the shortfalls of manufacturing capabilities against customer requirements, such as order processing, delivery, maintenance and repair, and field operations; they are also useful for product design improvements.

Zhang et al. (2023) examined the relationships among servitisation strategies - product-related services and customer-oriented services - and two distinct types of inter-organisational IT capabilities. Their research suggests that services focused on the product should be matched with IT reconfiguration, while services oriented towards the buyer should be matched with IT integration to maximise performance. On the contrary, misalignment (product-centred services use IT to balance personal/business interests and customer-centred services use IT to reconfigure techs) would be detrimental to work culture and performance (Bataineh et al., 2016). This finding fills the knowledge gap between servitisation and IT capabilities, indicating that while IT can help achieve more operational efficacy and service efficiencies and contribute to environmental sustainability, it should be analysed from a strategic viewpoint where they are both aligned strategically to gain a competitive advantage. From this perspective, ICTs are no longer operational facilitators but strategic resources that can significantly impact servitisation strategies and their associated outcomes. Specifically, the use of data analytics allows firms to track effectiveness and inform future strategies (Al Adwan et al., 2023). ICT and IT systems play an essential role in ensuring a smooth flow of information between operations; besides helping with order processing and logistics backup, they are also imperative functions in fashion.

1.5. Performance measurements and value demonstration

Organisations spend considerable time assessing their performance in isolation and as part of the chain - setting targets, building plans, and declaring key performance indicators to scrutinise performance data. Such detailed examination facilitates informed decision-making (Aboumoghli & Al-Abdallah, 2018). In manufacturing, organisations adjust their performance measurement systems to mirror their customers, i.e., focusing on cost, speed, quality, quantity, or delivery, thereby ensuring value (Pasha & Poister 2017). This involves adopting a customer-centric approach that prioritises outcomes aligned with individual customer needs and processes (Zhao & Wang, 2021). Consequently, the service delivery systems employed by manufacturers may vary significantly to accommodate diverse customer requirements, yet all aim to demonstrate the manufacturer's inherent value (Baines & Lightfoot, 2014). Essentially, customer expectations directly influence performance metrics, which are then translated into micro-measures by the manufacturer. These micro-measures relate directly to product and/or service performance and are further broken down into localised performance indicators. Such indicators highlight the value offered by reducing costs, enhancing flexibility, eliminating waste, and removing non-value-adding activities. This strategic focus ensures that all aspects of product and service delivery are streamlined to maximise value for both the manufacturer and the customer (Cantini et al., 2021). In addition to the above, the fashion sector performance measurement can be assessed through sales, marketing and branding, value creation and customer satisfaction.

1.6. People deployment and their skills

The servitisation strategy necessitates an innovative approach to the organisation, training, and enhancing employee skills to ensure they possess the appropriate behaviours for effectively delivering advanced services (Lim & Kim, 2018). Baines et al. (2013) identified six critical skill sets that underpin the desired behaviours of personnel involved in delivering advanced services. These competencies include: flexibility, which is the ability to adapt to different working conditions to meet customer needs; relationship building - developing a supportive and collaborative culture that extends from the internal operations of the manufacturer to its customer-facing functions; service-centricity - actively listening to and valuing clients' concerns and responding with emotional cues, empathy, and a commitment to problem resolution; authenticity - ensuring that commitments are realistic and within the capabilities of the manufacturer's values and promises; problem solving - analytical thinking and creative solutions to fulfil and exceed customer expectations; resilience - the ability to remain composed under pressure and to manage difficult situations effectively, which is necessary for handling customer complaints and dissatisfaction with calmness and reassurance. Acknowledging and incorporating these skills into the servitisation process improves service delivery and positively impacts customer satisfaction and loyalty (Nguyen et al., 2022; Al-Abdallah et al., 2023), as effective employee management is directly correlated with enhanced organizational performance (Jahmani et al., 2023). This comprehensive approach to employee development underscores the critical role of human factors in successfully implementing servitisation strategies, especially in the fashion sector, which is considered a provider of high-involvement products for most customers.

1.7. Business processes and customer relationships

Business processes are the intrinsic components of an organisation that synergise information, personnel, and facilities to organise and execute activities and tasks collectively, ultimately delivering a service or product to a customer (Brajer-Marczak, 2016). In the context of advanced services, processes are designed to yield desired outcomes from products, emphasising communication over negotiation to meet customer performance expectations (Singh et al., 2021). Baines and Lightfoot (2014) characterised such relationships as "touch-points", where the manufacturer aligns processes with the customer's extensive range of touch-points, facilitating the development of robust inter-organisational relationships. The servitised manufacturer must establish a communication framework that promotes information flow and facilitates employee interaction within and outside the organisation (Leon et al., 2020). Such communication and interactions among staff are crucial for refining business processes in the fashion sector, where all retailers are considered actual touch-points with customers.

Consequently, these six dimensions are the driving forces behind delivering state-of-the-art services in the fashion retail sector and require deep consideration and strategic actions that may involve several stakeholders to strategise around. Furthermore, the interdependence between these factors clearly demonstrates that one can significantly affect another through inefficiencies (as mentioned in the two or more dimensions discussed). This analysis provided further evidence that servitisation strategies should be approached holistically and integrated to deliver meaningful, synergistic results.

2. Research methods

This research utilises an exploratory qualitative design to explore the adoption of servitisation strategies in the GCC fashion industry. In light of the emergence of servitisation research in this particular regional and sectoral context, a qualitative approach would be most suited to capture the subtle, complex barriers and practices from the grounded perspective of senior industry leaders (Yin, 2018; Hennink et al., 2020). The methodology was designed to ensure depth of understanding and methodological rigour, in terms of including semi-structured interviews of purposively sampled participants and a detailed thematic analysis.

2.1. Semi-structured interviews

Semi-structured interviews conducted over three months were used to gather primary data. The interview guide consisted of 12 purposefully designed questions, ranging from general knowledge of servitisation to implementation issues. Aspects of data collection included the following:

Interview mode: face-to-face (n=6) and virtual (n=3) interviews.

Duration per interview: 45-60 minutes.

Recording and transcription: all interviews were audiotaped with consent and transcribed verbatim.

Ethical considerations: strong anonymisation rules, organisations and the affiliates provided with pseudonymous names.

This semi-structured approach balanced maintaining consistency across interviews and providing flexibility to discuss the development of emerging themes, including region-specific barriers to servitisation adoption.

2.2. Research population and sample

The design of the study was based on a detailed analysis of three multinational fashion companies (A, B, and C) operating in the six countries forming the GCC. The organisations were chosen using three key criteria, presenting the validity and the generalisability of the findings:

Market power: collectively comprising about 30% of the GCC fashion market (Chalhoub Group, 2022).

Operational network: continually retailing in all GCC countries (UAE, Saudi Arabia, Qatar, Kuwait, Oman, and Bahrain).

Balance of diversification: serving various market segments (luxury, high street, and hybrid businesses).

The purposive sampling strategy was focused on senior-level managers (n=9) who satisfied strict eligibility requirements, including at least five years of experience in the GCC fashion industry and direct engagement in managing a minimum of two servitisation dimensions according to the description by Baines and Lightfoot (2014). The sampling method guarantees respondents have the required knowledge and authority within their organisation to ensure insightful comments regarding practices and challenges of servitisation implementation.

2.3. Data analysis approach

A formalised six-stage process of thematic analysis (Braun & Clarke, 2006) was systematically undertaken on the interview transcripts. Stage one involved familiarisation, i.e., the repeated reading of transcripts to identify initial pattern codes. Next, an early coding followed, in which the codebook was generated using the NVivo 12 program. Then, similar codes were aggregated into general themes during theme generation. The themes were subsequently validated through peer debriefing (kappa = 0.81). The essence of the themes was then explicitly described in the theme definition process. The last phase of report production involved decisions about which illustrative quotes, if any, to use and the final analysis. For

Tab. 1. Description of the analysed retail fashion companies

Company	Years of operation	Size	Number of stores	Managerial positions of the interviewed personnel	Number of employees	Annual sales turnover, USD	Number of fashion brands
(A)	60 Years	Large	60 Stores distributed over Qatar, UAE, Oman, and Saudi Arabia	General Manager, Operations Manager and Store Manager	600 employees	20,000,000	100 fashion brands
(B)	40 Years	Large	200 Stores distributed over all six Arab Gulf countries	Operations Manager, Retail Manager and Store Manager	1500 employees	50,000,000	150 fashion brands
(C)	50 Years	Large	100 Stores distributed over all the Arab Gulf countries except Saudi Arabia	Director Manager, General Manager and Retail Manager	1000 employees	30,000,000	120 fashion brands

instance, within the theme "Regulatory Constraints", codes included visa barriers and localisation laws, from which one informant explained, "We can't get Arabic-speaking staff in many markets because of the visa restrictions, so that has been a consistent challenge that we have faced" (OM, B). Likewise, the theme "Supplier Relationships" cited codes, e.g., data-sharing reluctance and IP concerns, as in the quote "Full sales data is never shared with brand partners" (MD, A).

The research included several measures to establish the trustworthiness of the findings (Lincoln & Guba, 1985). Credibility was addressed through member checking with three participants to verify interpretations. Transferability was improved by describing the GCC context in detail, thereby facilitating future comparisons. Finally, confirmability was enhanced by retaining research reflexivity memos to counteract biases.

3. Research results

3.1. Compared dimensions of the servitisation strategy

In this study, a simple coding system was utilised to designate various dimensions of servitisation, using natural numbers to denote them and elucidate their roles in supporting the strategy. Dimension 1 (D1), localised facilities, delivers effective and efficient training that ensures a thorough and sustained understanding of product use and functionality. D1 closes the training capacity gap by providing a training facility [2]. Such facilities also aid in the digitalisation of knowledge relevant to distance monitoring, enabling manufacturers to perfect and adapt product designs or features conforming to market preferences (Bainest & Lightfoot, 2014). D2, micro-vertical integration and supplier relationships, reinforces production control, stimulates innovations, and improves supply chain performance. This integration links an organisation with its suppliers and customers to facilitate the delivery of enhanced services (Wadeson, 2017), where strategic flexibility and effective decision-making are essential for optimizing logistics performance (Abu Hamour et al., 2023). D3, information and communication technologies, allows firms to integrate IT systems that connect suppliers, partners, and customers worldwide. Timeliness is necessary for delivering effective information for business management, production planning, process control, facility management, and practical information sharing (Wendt et al., 2021). However, D4, performance measurement and value demonstration, is a crucial step in spreading advanced services by illustrating graphical performance measures for every single customer, i.e., every distributed market, by combining tools in the practical sense of one-to-many messaging. Key performance indicators, including cost, speed, quality, quantity, and delivery, are customised to meet the unique needs of each customer and enhance service value (Baines & Lightfoot, 2014). D5, people deployment and their skills, is indispensable for the servitisation strategy. Despite technological advancements, organisations invest in human capital, recognising its pivotal role in efficient operations. Thus, efforts are made to improve staff organisation, training, and skills to ensure they are equipped to deliver advanced services, as Baines et al. (2013) identified, especially for front-office employees. Finally, D6, business processes and customer relationships, is crucial for servitisation. Business operations must be inspired and determined by customer touch-points, reinforcing inter-organisational relationships where effective knowledge management is essential to sustain and improve these relationships amidst market changes and evolving customer expectations, as indicated by Brajer-Marczak (2016).

3.2. Interview results for Organisation A

Upon the completion of the interview with Organisation A, Table 2 below has been meticulously crafted to illustrate the results of the six dimensions mentioned above and their respective levels of usage or adoption, providing an overview of Organisation A's position in the servitisation strategy.

In general, the managers interviewed in Organisation A acknowledged a weakness within the front team, noting instances where sales personnel struggled to provide adequate responses regarding basic product knowledge. However, the ICT deployment has positively impacted the planning and development of business processes, particularly regarding speed, accuracy, and reliability. Information stored about product characteristics, such as materials, styles, colours, and sizes, is categorised and sub-categorised, enabling partners to better understand customer needs and preferences, as explained by the Managing Director (MD). Additionally, the use of business software plays a crucial role in providing partners with timely and accessible information for use in product production decisions.

Tab. 2. Servitisation dimensions and barriers in Company A

Servitisation dimension (Baines & Lightfoot, 2014)	Implementation level	Key barriers identified
1. Facilities & locations	Partial adoption	High real estate costs; cultural preference for mall-based retail
2. Micro-vertical integration & supplier relationships	Low adoption	Supplier distrust; IP protection concerns; hierarchical decision-making
3. Information & communication technologies (ICT)	Moderate adoption	Outdated systems; resistance to cloud-based platforms
4. Performance measurement & value demonstration	Emerging	Lack of standardised metrics; short-term profit focus
5. People deployment & skills	Critical weakness	Visa restrictions; high turnover; language barriers; inadequate training
6. Business processes & customer relationships	Moderate	Siloed departments; lack of employee empowerment

Partial adoption - some elements of the dimension are implemented, but not fully integrated or optimised.

Low adoption - the dimension is in the early stages of implementation with limited application across the organisation.

Moderate adoption - the dimension is implemented to a certain extent, with ongoing development and refinement.

Emerging - the dimension is beginning to be recognised and implemented, but is still in early phases.

Critical weakness - the dimension is significantly lacking and requires substantial improvement.

Moderate - the dimension is implemented to a certain extent, with ongoing development and refinement.

3.3. Interview results for Organisation B

Upon the completion of the interview with Organisation B, Table 3 below has been meticulously crafted to illustrate the results of the six dimensions mentioned earlier and their respective levels of usage or adoption, providing an overview of Organisation B's position in the servitisation strategy.

Similarly, Organisation B faces challenges with its front team and the limited deployment of micro-vertical integration. Integration with suppliers primarily focuses on operational cooperation, such as reporting sales movement by category and department. However, sharing other crucial information, such as customer orientation and preferences, is limited due to its sensitivity. On a positive note, the sales team has highly sophisticated and technologically advanced mobile devices. These devices are connected to both the local inventory and an online store, allowing them to check the availability of sizes and colours of items for clients, even if they are not in the local warehouse. Furthermore, deploying customer relationship management (CRM) systems on these mobile devices helps the firm manage customer interactions and efficiently collect their preferences.

Tab. 3. Servitisation dimensions and barriers in Company B

Servitisation dimension (Baines & Lightfoot, 2014)	Implementation level	Key barriers identified
1. Facilities & locations	Partial adoption	High real estate costs; cultural preference for mall-based retail
2. Micro-vertical integration & supplier relationships	Low adoption	Supplier distrust; IP protection concerns; hierarchical decision-making
3. Information & communication technologies (ICT)	Moderate adoption	Outdated systems; resistance to cloud-based platforms
4. Performance measurement & value demonstration	Emerging	Lack of standardised metrics; short-term profit focus
5. People deployment & skills	Critical weakness	Visa restrictions; high turnover; language barriers; inadequate training
6. Business processes & customer relationships	Moderate	Siloed departments; lack of employee empowerment

Tab. 4. Servitisation dimensions and barriers in Company C

Servitisation dimension (Baines & Lightfoot, 2014)	Implementation level	Key barriers identified
1. Facilities & locations	Partial adoption	High real estate costs; cultural preference for mall-based retail
2. Micro-vertical integration & supplier relationships	Low adoption	Supplier distrust; IP protection concerns; hierarchical decision-making
3. Information & communication technologies (ICT)	Moderate adoption	Outdated systems; resistance to cloud-based platforms
4. Performance measurement & value demonstration	Emerging	Lack of standardised metrics; short-term profit focus
5. People deployment & skills	Critical weakness	Visa restrictions; high turnover; language barriers; inadequate training
6. Business processes & customer relationships	Moderate	Siloed departments; lack of employee empowerment

3.4. Interview results for Organisation C

Upon the completion of the interview with Organisation C, Table 4 below was meticulously crafted to illustrate the results of the six dimensions mentioned earlier and their respective levels of usage or adoption, providing an overview of Organisation C's position in the servitisation strategy.

The third organisation made significant investments in employee development through training programmes, focusing on product knowledge and sales skills. As a result, the sales team in Organisation C can accurately and persuasively present and describe fashion products, enabling them to deliver advanced services effectively. However, due to cost-cutting measures, Organisation C operates with software and hardware purchased in 2015. Consequently, this outdated technology has detrimentally impacted the delivery of advanced services.

4. Discussion of the results

In addressing the concept of the servitisation strategy and its business implications, the MD of Organisation A elucidated the organisation's profound comprehension of the term and its potential merits:

"We acknowledge the term theoretically and practically and are actively implementing such a strategy in our current services. We also endeavour to integrate it with our present and future strategies."

Correspondingly, within organisation B, the Operations Manager (OM) underscored their extensive five-year engagement with the servitisation strategy, affirming that:

"We have found the servitisation strategy to be highly fitting for our operations and the GCC market, where most customers are under 30, each with distinct expectations and demands from older generations".

Meanwhile, in Organisation C, the General Manager (GM) provided a succinct interpretation of "servitisation" as:

"The provision of goods and services to our clients in the GCC market while continually adding value, including personalised services".

In terms of the competencies deployed, encompassing practices and technologies utilised in implementing the servitisation strategy, Organisation A's MD, OM, and the Retail Manager (RM) affirmed the substantial support from their partners. They mainly highlighted initiatives to enhance services and expand market share in the Gulf region. Utilising contemporary technologies, they gather and store data on fashion product characteristics, which is instrumental in developing new products. The OM acknowledges that:

"Although we had numerous policy schemes in place before officially adopting this approach, we promptly recognized the need for significant changes in our policies, strategies, and business operations in the GCC area".

Organisation B has embraced various initiatives to meet market demands and enhance services. They have also adjusted their approach with partners regarding relationship dynamics, information sharing, and timing. Despite initial resistance from some senior managers, communication levels with partners have been enhanced. In Organisation C, the OM asserted that:

"The primary driver of servitisation is the continuous enhancement of our goods and services to surpass our clients' expectations. We rely on advanced technology in our services for our customers, including systems, and emphasise product and service innovation".

In addressing the challenges related to building the necessary ongoing relationship with suppliers/partners for servitisation, encompassing communication, coordination, and data sharing, the RM of Organisation A confirmed that suppliers are not granted access to the ERP database. Instead, reports are manually prepared using an ERP system to safeguard what the organisation deems confidential data, which may include retail prices or sales movement features.

Similarly, in Organisation B, the OM elucidated that sharing reports containing figures, such as sales movement and sell-through, necessitates approval from top executives. Such reports are considered sensitive as they reflect the organisation's image and performance in the eyes of its partners. The OM elaborated that:

"We do not typically disclose the total sales amount, but the information provided enables partners to estimate it, facilitating the implementation process of the servitisation strategy".

In contrast, in Organisation C, the OM emphasised that information sharing is pivotal in shaping their plans, making decisions, and staying ahead of the market's needs and requirements to deliver the advanced services they aspire to provide. However, the GM must confirm all reports and data records before disseminating them to their partners.

In addressing the challenges encountered during the implementation of the servitisation strategy, the three managers at Organisation A acknowledged the difficulties in recruiting and hiring the sales team in the Gulf region. They noted that most newly employed personnel lack experience and skills, requiring extensive training in almost every aspect of their jobs, particularly in providing customer services and solutions. The managers highlighted that all fashion companies in the Gulf region face significant challenges in finding suitable candidates in the sales market due to the local government's policies in the Arabian Peninsula, particularly regarding the issuance of new visas or the approval of transfer working visas from one sponsorship to another, influenced by political and/or economic reasons. The OM further confirmed the challenges in the recruitment process, stressing that it is a common struggle for all fashion companies to find native Arabic speakers with the necessary sales skills to serve and communicate with customers effectively, in addition to the high turnover rates for local employees:

"We have a complicated law for visa acquisition in most of the GCC countries, which prevents us from bringing employees from certain countries."

In the same vein, in Organisation B, OM identified the same two main challenges in the operational processes, which hinder the full adoption of the servitisation strategy. Compliance with the rules and regulations of the GCC region concerning labour law and difficulties in attracting Arabic-speaking employees in the market. The OM stated that:

"With the beginning of the so-called Arab Spring in 2011, the GCC countries have set several restrictions on bringing employees to the fashion retail market and other sectors from neighbouring Arab countries… The locals do not last long in such jobs as they view them as merely a temporary stage until they find something more relevant to their career path".

In Organisation C, managers underscored the challenges posed by the operational environment of the GCC region. They also emphasised the impact of visa laws on hiring and recruiting employees within Gulf nations, especially since most local employees are mainly college students or fresh graduates with no real intention to stay for long. Furthermore, the Store Manager (SM) highlighted another significant challenge related to the high cost of updating software and hardware technology. This challenge arises due to the region's limited availability of skilled IT companies. The SM emphasised that:

"One of the main challenges we face in implementing the servitisation strategy is the costly, constant requirement of updates in the services and technology systems that causes delays in preparing the goods to be displayed in our fashion store in time".

As for exploring the implications of the servitisation strategy on the value of goods and services, alongside the roles played by their partners in enhancing this value and the technologies needed for that, a range of perspectives emerged from different companies.

The MD at Organisation A noted that, through advanced technologies today, one can find and store the data on goods regarding their (a) type, (b) style, (c) material, (d) colour, (e) size, etc. And the organisation will lead to high value in goods and services.

On the flip side, with Organisation B, the SM mentioned that deploying and integrating CRM systems with business processes is key in delivering value to customers. With the help of a CRM system, an organisation can provide personalised services by

Tab. 5. Alignment of findings with servitisation dimensions

Servitisation dimension (Baines & Lightfoot, 2014)	Implementation status in GCC	Key barriers identified	Supporting evidence	Affected organisations
1. Facilities & locations	Partial adoption (local training centres but limited repair/return infrastructure)	High real estate costs; cultural preference for mall-based retail	*"We train staff in-store but lack dedicated service hubs"* (MD, B)	A, B, C
2. Micro-vertical integration & supplier relationships	Low adoption (operational coordination only)	Supplier distrust; IP protection concerns; hierarchical decision-making	*"Sales data is shared only after board approval"* (OM, A)	A, B
3. Information & communication technologies (ICT)	Moderate adoption (basic CRM/ERP)	Outdated systems (Org C); resistance to cloud-based platforms	"Our 2015 software can't handle real-time inventory checks" (SM, C)	C (severe), A, B (partial)
4. Performance measurement & value demonstration	Emerging (customised KPIs but no long-term tracking)	Lack of standardised metrics; short-term profit focus	*"We measure monthly sales but not customer lifecycle value"* (RM, B)	B, C
5. People deployment & skills	Critical weakness	Visa restrictions; high turnover; language barriers; inadequate training	*"Locals leave for government jobs within months"* (GM, C)	All (severely)
6. Business processes & customer relationships	Moderate (personalisation attempts but inconsistent)	Siloed departments; lack of employee empowerment	*"Store staff can't approve returns without HQ approval"* (OM, A)	A, C

giving attention to individual client needs or preferences, which improves their experience.

The OM from Organisation C highlighted the need for healthy relationships with partners, enabling flexibility in inventing, designing, and producing products, particularly in relation to Gulf market products.

Based on the mix of challenges in the interview data compared to those worked based on six dimensions and visual observations, most challenges these organisations face are driven by the outside world, which is also connected with challenges in the GCC operational environment. Conversely, internal challenges appear more amenable to resolution by adapting or adopting alternative practices and strategies. Moreover, the results indicate that while the three fashion retail organisations have embraced practices and technologies crucial for servitisation, their implementation often deviates from ideal methodologies. As digital technologies continue to advance, the role of digital transformation in enabling servitisation becomes increasingly pivotal through adopting technologies, such as artificial intelligence (AI), blockchain, and the Internet of Things (IoT), which are not leveraged by the GCC fashion sector.

These findings underscore two primary weaknesses impeding the servitisation efforts of these organisations. First, as elucidated across the three examined cases, transparency is insufficient and engagement with partners is limited (the fashion goods providers). This constrained relationship is influenced by factors such as competition over brand acquisition, apprehensions regarding sensitive data disclosure, and constraints on partner involvement in operations and hierarchical decision-making structures. Second, a notable challenge arises from the inadequately skilled front-line personnel due to neglected training programmes, the aftermath of the Arab Spring, language barriers, and prevailing visa regulations for foreign employees in GCC countries. These factors collectively hinder the effective implementation of the servitisation strategy.

Conclusions

Existing research on servitisation is primarily underpinned by universalism, and its application universally across sectors is discussed in relevant research (Lederer & Miric, 2016). Yet this research questions that assumption, given that GCC fashion firms are confronted with cultural-regulatory barriers (e.g., visa restrictions on skilled labour and a mall typology as a norm). Furthermore, luxury-specific supplier dynamics, such as competing intellectual property concerns, preclude sharing sales data (e.g., reports requiring board approval). Finally, tech adoption paradoxes should be mentioned, i.e., outdated inventory systems remain in place due to cost considerations, and despite the availability of advanced

CRM technologies (Table 4), this disconnect was not addressed in earlier frameworks (Table 3).

In response to the first research question (What is the current level of servitisation in the GCC markets within the fashion sector?), interview findings indicate that the servitisation strategy is in its nascent stages of implementation within the GCC fashion sector. While evidence exists for the foundational dimensions of servitisation, they are not integrated and operationalised as the literature recommends, yielding the desired outcomes.

In response to the second research question (What obstacles might hinder servitisation adoption for fashion agents in GCC markets?), several barriers impede fashion agents in the GCC markets from embracing servitisation on a broader scale. These barriers encompass a lack of product knowledge, insufficient attention to essential training programmes, scarcity of skilled employees, limited employee empowerment and involvement, language barriers, constraints on data sharing, and prevailing visa laws in GCC countries.

This research concludes that the six dimensions of servitisation outlined in previous studies are essential for successful implementation. Given their strong connections, adopting these measures will likely positively impact all aspects of the servitisation strategy. For international manufacturers and their partners in the GCC markets, getting this servitisation strategy off to a good start presents a long-term win-win opportunity for bringing high-end fashion goods to the market in much more innovative ways. On the other hand, the paper reveals many micro and macro-level aspects that affect the servitisation process in GCC. Related to the inadequate knowledge about the product, absence of necessary training programmes, lack of training personnel, investment control in the organisation, the language barrier between human resources and also availability and data sharing limits due to various extents of technology implemented and specifically visa laws available in the GCC Nations. Overcoming these challenges will be essential for fashion developers in the GCC to remove barriers and unlock the benefits of servitisation.

These research findings differ from those of earlier servitisation research in three main areas. First, unlike Zahoor et al.'s (2023) study on UAE SMEs, which identified ICT adoption as the principal source of servitisation, GCC haute couture organisations encounter conflicting tech barriers: despite deploying CRM systems (Table 3), antiquated stock management investments endure because of risk aversion (Table 4). This outlines the industry's focus on IP protection rather than operational agility. Second, while Raddats et al. (2019) presented supplier integration as a cross-industrial issue, GCC fashion organisations face the heart of hierarchical decision-making (e.g., board approvals to share the data, Section 4.1.2), which is a limitation that is embedded in regional business cultures. Third, in contrast with manufacturing research (Baines & Lightfoot, 2014), labour turnover in these settings reflects visa policies and competition with government jobs (Section 4.2), thus a place-specific labour strategy.

To summarise, this study has unearthed and examined the novel routes and extent of servitisation strategies in the GCC fashion markets. The study has provided insights into service-oriented practices in the fashion industry through assessing adoption and barriers to implementation. It has also addressed the literature gap in examining servitisation usage in a regional context and its performance (Huang, 2022; Luo et al., 2023; Li et al., 2021; Zahoor et al., 2023). By providing empirical proof of service behaviours undertaken by local firms, this research has furthered considerable understanding of how the business landscape is evolving in the GCC fashion markets and also through servitisation and its perception and implementation by businesses in this region. This means there is a slight improvement in the distant future's servitisation measurements, which this paper provides proper guidance towards (Lee et al., 2021) as a typical dummy variable treatment.

Managerial implications

This research indicates that fashion organisations in the GCC are proactively refining their operations and strategies to better align with the demands of servitisation. However, challenges stemming from the operational environment in the GCC region are hindering efforts to find and recruit employees possessing the necessary skills and knowledge. Nevertheless, the research identified several strategies for fashion firms to enhance their positioning towards servitisation. One such strategy involves implementing training programmes for their partners across various areas. These programmes impart the knowledge and skills needed to deliver advanced services.

Additionally, managers highlighted limitations on the data provided to their partners. While the specific data types withheld were not explicitly identified, the literature suggests that any constraints on data sharing and integration could impede the optimal outcomes of servitisation. Therefore, these organisations must foster transparent relationships with their partners, enabling them to assume more operational roles. Managers should empower their staff members, including store managers, supervisors, and front-line teams, to take on more active roles in servitisation. By doing so, they can leverage their workforce's collective expertise and insights to drive the successful implementation of servitisation strategies. Lastly, the analysis pinpoints two pressing areas of policy concern for GCC governments. The first is to adjust retailer visa quotas to help alleviate the shortage of Arabic-speaking talent (Section 4.2) and to modify visa laws that favour other industries (e.g., construction and health). Second, encouraging local IT upskilling initiatives would decrease dependency on expensive foreign tech solutions- one of the outdated systems mentioned in Table 4.

Addressing barriers: strategic advice

The results reveal three principal barriers affecting the acceptance of servitisation in GCC fashion companies: supplier mistrust, employee skills shortages, and antiquated ICT infrastructure. To mitigate these problems, interventions were outlined. In the context of supplier relationships, companies should establish a series of trust-based stages, starting with sharing aggregated sales trends and working towards collaborative demand forecasting and even real-time systems integration over secure platforms, e.g., blockchain. This sequential model enables partners to prove their trustworthiness while safeguarding sensitive IP. At the same time, it would be helpful for companies to set up cross-innovation teams with their most important suppliers to co-develop services, such as customised styling programmes or repair services.

A two-pronged skills development and retention solution has been proposed regarding human capital challenges. Fashion retailers should collaborate with local schools to develop training programmes for Arabic language focused on luxury product knowledge, service skills at an advanced level, and digital fluency. To control the high turnover, companies must remodel career pathways for local talent, with clear steps from entry-level positions to specialised ones, such as personal shoppers, and government incentives to train national workforces.

Modernising technology should be a common-sense, cost-effective approach. Companies should also focus on modular enhancements to their current systems, start with a cloud-based CRM deployment, and then add API connections to legacy inventory systems over time. Those of the GCC region can cooperate with technology vendors based in GCC countries to develop custom solutions, attuned to regional market nuances, and pilot testing Arabic-language AI assistants could provide evidence that the digital transformation needle can be moved without a gargantuan infrastructure overhaul. This incremental progress (within the sector's technological risk management comfort zone) is finding a happy medium between risk aversion and the urgency to foster competitiveness.

Implementation should be on a structured timetable with an initial audit of existing capabilities (0-6 months) and a pilot test of key initiatives (6-18 months), with eventual scale and performance monitoring via servitisation-specific KPIs, such as customer retention rates and service revenue contribution. This deliberate approach lets them course-correct while showing results and securing internal buy-in.

Limitations

One of the most critical limitations of qualitative studies is their contextual nature, where conclusions are often tailored to the specific environment and participants involved. This customisation can make it challenging to generalise the findings to a larger population. Therefore, the results and conclusions of this research study are constrained to the prominent fashion firms in the GCC market. Enhancing the generalisability of the results would require future research with a more extensive and more diverse sample. Furthermore, the lack of published studies on servitisation in the GCC's fashion sector underscores the importance of this research. This, however, also makes benchmarking these results against similar studies difficult.

Future research

This research can positively contribute to future studies investigating servitisation strategies, dimensions, effects and implementation processes specific to the GCC fashion market. The barriers identified in the firms are revealing for future research concerning their underlying causes. Further empirical validation of these results in other cultural environments would help clarify how culture influences perceptions, behaviours and experiences relating to servitisation.

Since this study was exploratory and limited to multinational organisations operating in the GCC fashion sector, future research should more broadly sample industries or sectors. This research effort focused on various constituents in the fashion ecosystem, from SMEs to startups and other partners on the supply chain side and the point of entry to end customers. Increasing the sample size would also enable a mixed-method approach: quantitative methods, such as surveys, could corroborate and broaden qualitative findings. Further studies could also challenge more novel, technological-focused methods - as in digital servitisation - to explore technology as a potential mediator for servitisation strategies and innovation in the GCC fashion sector.

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