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Comparative analysis of marketing integration strategies in three different marketing environments

Adeleke Adepoju*¹ and A.L. Badmus²

¹Department of Economics and Business Studies Redeemer's University, Redemption City Mowe Ogun State Nigeria
²Department of Business Administration University of Ilorin, Ilorin

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The paper presents the results of a study of comparative analysis of marketing integration strategies in three different marketing environments. It is observed that one of the fundamental challenges facing the multinational enterprise in the contemporary world is the decision to standardize marketing programs and practices or to tailor them according to the local conditions of the host country. A vigorous comparative methodology of matched samples at the level of statistical analysis was utilized for the study. Japanese, South Korean and Indian MNEs in Nigeria affiliates were matched on the basis of product mix, industry age, size, market served and other environmental variables to obtain certain conditions. The sample size consisted of 121 firms of Asian MNEs in Nigeria vis-a-vis 41 Japanese, 44 Indian and 36 South Korean affiliates in Nigeria. The sample was selected on the basis of products, market served and other environmental variables. The study therefore examines the marketing integration strategies in low risk environment of western Europe and USA, moderate risk environment such as south Korea, Japan and other emerging industrialized countries in Asia and high risk environment such as Nigeria and other developing countries in Africa and Latin America. The result of the study shows that the integration of product decision is uniform in the three market environments while that of price is less uniform and less high. The communication and distribution strategies vary from high integration USA to average integration (South Korea) and low integration (Nigeria)

Keywords: Low, medium and high risk environments; Centralization of marketing; Multinational enterprises; Adaptation of products; Marketing Decisions; Integration of marketing organizations and environment; Standardization of marketing subsidiaries.

INTRODUCTION

The fundamental challenge facing the multinational enterprises in the contemporary world is the decision of whether to standardize marketing programmes and practices or to tailor it according to the local condition of the host country.

A lot of factors seem to sway the likelihood that in some circumstances, standardized marketing practices might be successful than multi domestic one. One of these is the growing similarity in terms of consumer tastes, economic condition and environmental factors. Besides, the ever increasing size and scope of operations create further problem of effective control in so far as they

operate in extremely complex settings and these complexities are brought about by multifaceted cultural milieu and differences in competitive structures.

Several studies have shown that environmental conditions have significant influence on organizational factors. Burns and Stalker (1961); Woodward (1965); Lawrence and Lorseh (1967); Negondhi (1976); Duncan (1972); Dance (1969); Furraker and Stopford (1968); Dance (1971) and Yousseff (1975).

For instance, in uncertain environmental conditions, organizations have a tendency to adopt more flexible structures. They become decentralized, less formalized and less standardized.

More importantly, differences in environmental conditions and degree of perceived risk have largely influenced the degree of standardized marketing practices within the context of multinational enterprises (MNEs).

*Corresponding Author Email: padeleke@yahoo.co.uk

The implication of this is that the degree of standardization of marketing practices and procedures vary among the three different market environments. The three different market environments include: Low risk environments such as Western Europe and United States of America; Moderate risk environments such as South Korea, Japan and other emerging industrialized countries in Asia and High risk environments such as Nigeria and other developing countries in Africa and Latin America.

The contention of this study is that the examination of these different market environments would facilitate comparison of different types of standardization of marketing programmes and practices that would exist between countries that are culturally, economically and politically different and exhibit different degrees of risk.

Several research works carried out in the low risk environment of Western Europe and United States of America have shown that the degree of standardization of marketing practices tend to be relatively high (Aylmer, 1970; Wiechmann, 1975; Sorenson and Wiechman, 1975). On the other hand, the study carried out by Ahn, Lassere and Chandon, (1987) in moderate risk environment of South Korea showed that the degree of standardization tend to be modest while the result of MNEs operating in Nigeria (a high risk environment) tend to exhibit a comparatively low degree of standardization of marketing practices and procedures: because of disparity in the level of economic development and differences in environmental factors.

In the context of the relationship between the headquarters and the overseas affiliate; the environment of the host country can influence the centralization and the standardization of marketing decisions in the affiliates of MNE. In view of this, Picard (1977) undertook a study in which he discovered that there is a significant correlation between the speed of evolution of the host country market conditions and the degree of autonomy granted to affiliates. Consequently, the more uncertain the host country market is, the more the MNE have tendency to decentralize marketing decisions in their affiliates.

The differentiation of marketing approach in the host country market is more of the resultant effect of the constraints than that of a will to exploit the differences of the overseas market. The tendency is rather strong towards standardization when there are very slight differences between two markets. Wiechmann (1974) discovered in his study that the degree of standardization rises when the degree of similarity between markets is considerable.

The objective of this research is to undertake a comparative analysis of the results of studies conducted in the three different market environments as they affect the integration strategies of international marketing. This would enable us respond not only to the proposition of Levit (1983) concerning the globalization of international marketing but also to make generalizations concerning

the elements of the marketing mix that are most or least amenable to standardized marketing.

The three market environment in this study include: The study of Sornson and Wiechmann (1975) on the European subsidiaries of American MNEs (a low risk environment); the study of Ahn, Lassere and Chandon (1984) on South Korean MNEs (in moderate risk environment) and the present study on Nigerian subsidiaries of Asian MNEs (a high risk environment).

RESEARCH METHODOLOGY

As evident from the literature review, the majority of studies in the area of marketing integration strategies of MNEs in their affiliates in the respective host countries have been descriptive in nature with some analytical and methodological deficiencies. This situation raises a lot of important questions concerning data analysis, reliability and validity of measurement of concepts.

A rigorous comparative methodology of matched sample at least, at the level of statistical analysis was utilized. Japanese, South Korean, and Indian MNEs in Nigerian affiliates were matched on the basis of product mix, industry, age, size, markets served and other environmental variables to obtain *ceteris paribus* conditions.

The sample size consisted of 121 firms of Asian MNEs in Nigeria viz-a- Vis 41 Japanese, 44 Indian, and 36 South- Korean affiliates in Nigeria. The sample was selected on the basis of products, markets served and other environmental variables. It is assumed that the sample is sufficiently representative for the study because it consists of virtually all Asian investments on the consumer- packaged goods industries in Nigeria. The total population of Asian firms in these sectors was selected as the sample.

The two sources of data collection were employed via-a-vis primary and secondary data. Primary sources included structured personal interview with marketing managers (expatriate and native) of the MN affiliates and the focus of the interview was on the degree of centralization and standardization of the 23 marketing decisions concerning the 4 marketing mix elements. At least four hours on the average was devoted to each subsidiary for personal interview and examination of book of accounts and records.

A structured-type of questionnaire was administered to the marketing executives of companies that made up the sample. The questionnaire addressed information about the parent company, the Nigerian subsidiaries, the Nigerian market environment and the centralization and standardization issues as they relate to 23 marketing decisions covering the 4 marketing mix elements.

Secondary sources involved the examination of books of accounts and records of the companies making up the sample. The fieldwork took place in Nigerian subsidiaries

Table 1: Percentage of Total Marketing Programmes Highly Integrated in the Three Different Global Market Environments.

Marketing Decision	Low Risk Environment	Moderate Risk Environment	High Risk Environment
Product Percentage	83.00	58.10	42.70
Physical Characteristics	81.00	56.00	45.46
Brand name	93.00	57.00	43.80
Packaging	75.00	56.00	38.84
Price	56.00	10.00	0.00
Retail price	56.00	5.00	0.00
Communication	58.00	35.00	0.00
Advert	71.00	32.00	0.00
Sales promotion	56.00	36.00	0.00
Advert Budget	43.00	55.00	0.00
Distribution	63.00	36.10	0.00
Roles of sales force	74.00	50.00	0.00
Sales force management	72.00	55.00	0.00
Channel functions	59.00	19.00	0.00

of Asian MNEs and lasted for at least nine months.

The measurement of the two control variables for the integration of the marketing activities of the foreign affiliates that is, the centralization and standardization of marketing decisions was introduced at the ordinal-scale level for the variable centralization and the interval-scale level for the variable standardization.

These measurements were carried out for the 23 marketing decision drawn from the 4 elements of marketing mix used in previous studies (Picard, 1977; Wiechmann and Sorenson, 1975); Ahn, Lassere and 1984; Olujide 1989). It must be noted however, that this type of measurement instrument brings along with it some kind of subjective judgment in terms of participants to be interviewed but the choice of this instrument is dictated by the necessity to undertake a comparative analysis with the major studies carried out in different market environments.

DISCUSSION OF FINDINGS

Comparative analysis of standardization of marketing programs in three different market environments

According to the study of Sorenson and Wiechmann on the European subsidiaries of American MNEs, (i.e low risk environment), a large proportion, 63% of the subsidiaries consider that the whole of their marketing strategy is highly standardized: 11% utilize a flexible programme while 27% adapt their strategy to local conditions. However, there are considerable variations in the degree of standardization of the four elements of the marketing mix. Product strategies are highly standardized

in 83% of the cases, 56% for pricing, 58% for communication and 68.3% for distribution strategies.

In the case of the study of Ahn, Lesserre and Chandon on the South Korean subsidiaries of the MNEs (a moderate risk market environment), 36% of the affiliates have highly standardized marketing procedures. In 23.8% of the cases, the degree of standardization is moderate and low for 40.2% of the subsidiaries. Each element of the marketing mix is standardized to a different degree. Product strategies are highly standardized (58.1%) while pricing strategies are only standardized up to 10.0% of the companies in the sample. The rates are 35.3% and 36.1% for communication and distribution respectively.

The results shown in table 1 indicate that 5.57% of the Nigerian subsidiaries of the Japanese, Korean and Indian MNEs (a high risk market environment) employed highly differentiated marketing procedures. The degree of standardization is moderate for 1.11% of the affiliates and low for 93.32%.

One observation from this analysis is that the Nigerian subsidiaries of MNEs have the lowest degree of standardization of marketing procedures. The marketing procedures are more standardized in the South Korean subsidiaries and most standardized by European affiliates of American MNEs.

This analysis shows that MNEs tend to adopt standardized marketing procedures when cultural differences between the host country and the country of origin are very minimal. For instance, Sorenson and Wiechmann found that American MNEs used highly standardized marketing techniques with subsidiaries in Europe. This result was due to the high degree of similarity between American and European market environments.

However, great differences exist between the market environments of industrialized and developing countries such as Nigeria. This is perhaps why the market practices in the Nigerian market environment are the least standardized. Environmental factors such as product use conditions, income levels, custom and traditions, literacy, technological context, legislation, etc help to explain such modification. However, there are some basic variations with respect to the four elements of marketing mix.

Product decisions

Table 1 shows that the physical characteristics, brand name and packaging of the product remain relatively highly standardized in the low risk environment but moderately standardized in moderate risk environment and less standardized in high risk market environments of South Korea and Nigeria respectively with rates of (58.1%, 57.6%) and (42.7%, 43.8%, 38.84%) respectively. These results correspond with those found by Sorenson and Wiechmann in the low risk environment of USA / Europe (83%, %, 93%, 75%).

While it is true that the environmental factors mentioned above vary significantly between developed and under-developed countries, table 1 above indicates a high degree of standardization of marketing procedures with respect to the three- sub-elements of the product. The hypothesis of product modification is therefore not proven.

The explanation is that more than 59% of the companies in the sample of Ahn, Lessere and Chandon and approximately 545% of the enterprises in the sample of the present study were established less than 10 years ago. This fairly largely proportion of the sample group had only short experience in the South Korean market and Nigerian market and therefore, tend to borrow heavily from parent companies expertise in marketing. Wiechmann and Hill who found greater adaptation corroborated this result and lesser standardization in more matured subsidiaries. That is, the original product idea is gradually shaped to fit the culture of the final consumer.

Secondly, the sample of this study includes several companies in the pharmaceutical and durable consumer goods industries. The products of these industries are relatively highly standardized because their products are not sensitive to cultural differences. This had probably been the reason for the high degree of standardization for the products.

Finally, several marketing executive explained that the quality and reputation of their products count a lot for the Nigerian consumers. Here foreign products have a better reputation than local ones- "the made abroad mentality". This is probably why the sub- elements of the product are standardized in order to produce goods of high quality

and reputation. This will give the products an image of "made abroad". In these circumstances, a high degree of adaptation of the product signifies deterioration in quality.

Pricing decisions

Among the four elements of the mix, decisions relating to price are the least standardized: 56% for Europe and U.S.A.; 10% in the case of South Korea and 0.0% for Nigeria . These figures indicate that pricing strategies are highly differentiated in the moderate and high –risk environments. This is probably due to the great disparity in production costs, competition prices, government regulations, custom and excise duties etc. between industrialized countries of Europe and America and the developing countries such as Nigeria on one hand and emerging industrialized countries such as Korea on the other hand.

Communication: Advertising and Promotion

Table 1 shows that 58% of the sample has a highly standardized advertising and promotion strategy in the low risk market environment of Europe and the USA. Only 35.3% is the case for South Korean subsidiaries while no Nigerian affiliate has a standardized advertising and promotion procedure. This area like pricing shows a tendency towards adaptation, particularly in the less industrialized countries.

Distribution decisions

MNEs in Nigeria and South Korea maintain a less standardized approach to distribution than those operating in Europe and the USA. Distribution, like pricing and communication, does not lend itself to uniform procedures. For instance, 68.3% of the companies in the low risk environment, 36.1% of those in the moderate risk market environment have a standardized distribution strategy. No single subsidiary utilizes a standardized distribution in the high-risk market environment.

These results are not surprising in that specialists in development economics contend that distribution structures reflect the level of industrialization of a country. This is why there are such significant differences in the results obtained for MNEs operating in the three market environments.

This comparative analysis of the results of the three studies show clearly that marketing procedures are globally more standardized in the low risk market environment, less in the moderate risk market environment and the least standardized in the high risk market environment (see figures 1 - 2). This is why there are such significant differences in the results obtained for

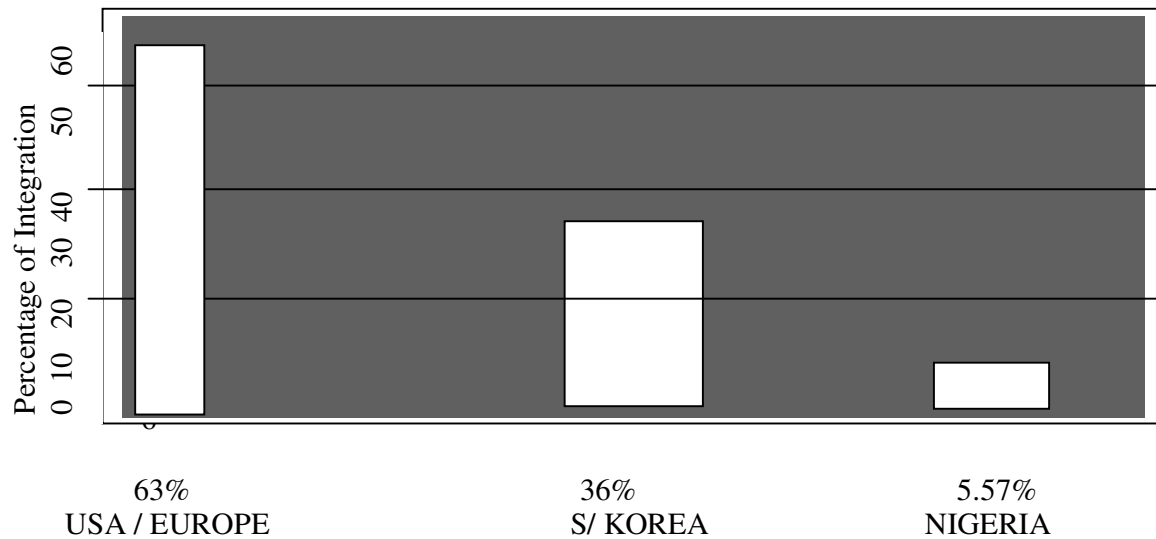


FIGURE 1: percentage of Total Marketing Highly Integrated in the Three Different Market Environments

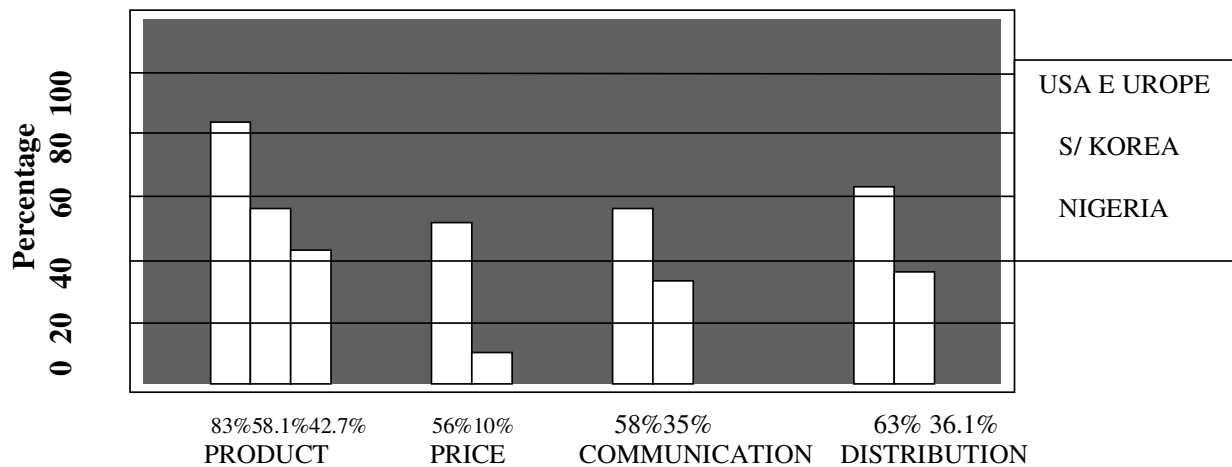


Figure 2: Percentage of Marketing Mix Elements Highly Integrated in the Three Different Market Environments

MNES operating in the three market environments.

Product price, communication and distribution comparative analysis of centralized marketing decisions in three different global market environments

According to the study of Sorenson and Wiechmann, 41.7% of marketing decisions are highly centralized, 17.17% centralized at moderate degree while 41.08% are decentralized (see Table 2).

In the research conducted by Ahn, Leseere and Chandon, only 6.20% of the enterprises sampled have highly centralized marketing decisions, 18.90% of the

cases averagely centralized while 74.90% have decentralized marketing decisions (see table 2).

According to the results of this study on Nigerian subsidiaries of Japanese, South Korean and Indian enterprises, a considerable proportion of the subsidiaries sampled (i.e 90.95) believe that marketing decisions are decentralized, 1.98% of the cases centralized at moderate degree while 7.08% of the cases are highly centralized.

Thus, one observation from this analysis is that the marketing decisions of European subsidiaries of American MNEs (i.e a low risk environment) are globally more integrated than in the cases of the two other environments. These marketing decisions are less integrated by the south Korean subsidiaries (a moderate

Table 2: Classification of Marketing Decisions according to Nine Integration modalities

Degree of standardization of Marketing Decisions					
Degree of centralization Of Marketing Decisions	LOW		AVERAGE		HIGH
	HIGH			LOW RISK ENVIRONMENT	
	AVERAGE	LOW	HIGH RISK ENVIRONMENT	MODERATE RISK ENVIRONMENT	

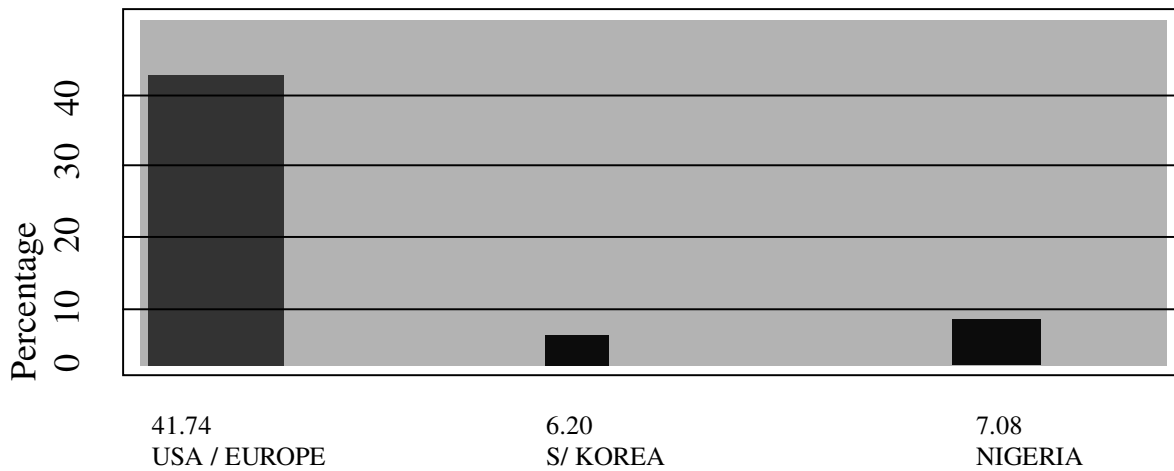


Figure 3: Percentage of Total marketing Highly Central in the Three Different Market Environments.

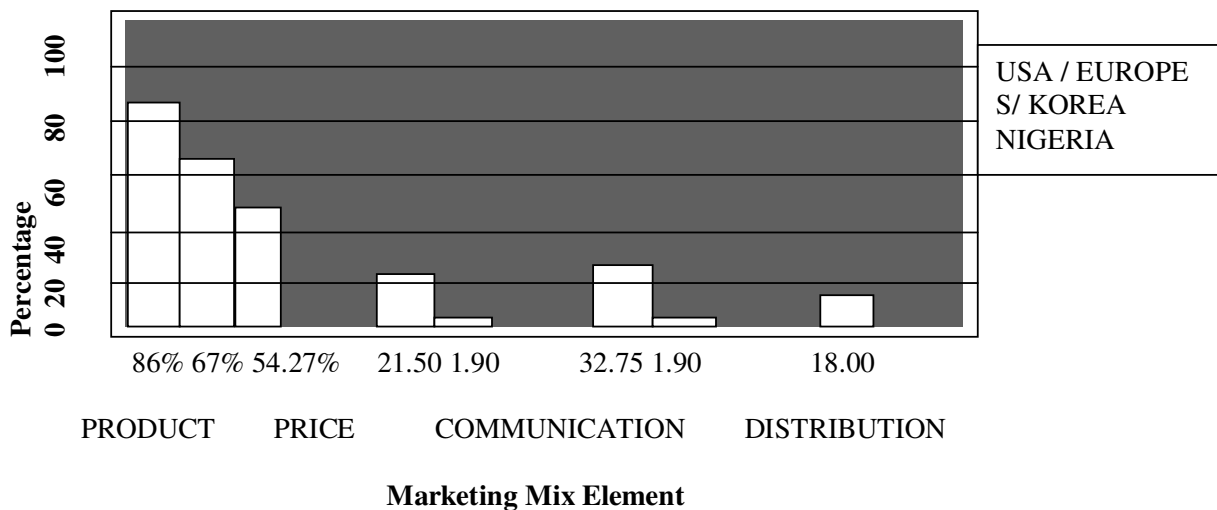


Figure 4: Percentage of Marketing Mix Elements Highly Centralized in the Three Different Market Environments

risk environment). They are also least integrated by the Nigerian subsidiaries of Japanese, Indian and South Korean MNEs (a high risk environment). Thus, the strategies of integration of marketing decisions applied are summarized in figures 3 – 4.

Product related decisions

Table’s 1 and 2 show that the marketing decisions on the product sub- elements (i.e physical characteristics, brand name and packaging) are highly integrated in the low risk

environment. They are highly centralized in 86% of the cases and highly standardized in 83% of the cases. As for product sub items, marketing decisions relating to the brand name are the most integrated.

The result obtained in the area of product for the South Korean subsidiaries indicates that the marketing decisions relating to product are globally centralized at moderate degree. However, they are highly standardized in 81.50% of the cases. As for the product sub-items, the decisions relating to brand name are the most centralized but less standardized.

For the Nigerian subsidiaries of Japanese, South Korean and Indian MNEs, the marketing decisions relating to the product are averagely integrated: 54.27% and 42.70% of the cases are highly centralized and standardized respectively.

Among the three- sub elements of the product, the decisions relating to the physical feature are the most integrated. The strategies of product decisions applied on the three different market environments are summarized as follows: A strategy of high centralization and high standardization are adopted in low risk environments; A strategy of high centralization and moderate standardization on moderate risk environment and; Strategy of moderate centralization and low standardization in high-risk environment.

Although the integration strategies of product decisions are at various degrees, they remain the most integrated in the low risk environments.

Pricing decisions

As can be seen in table 2, it appears that MNEs enjoy a considerable autonomy in the area of pricing decisions no matter the market environment where they are found. The degree of centralization of pricing decisions in the three different market environments attests to this assertion. For instance, price related decisions are highly centralized for 21.5% of the sample in moderate risk environments. This is so for 1.90% in a moderate risk environment and 0.00% in high-risk market environment. As for standardization of these decisions, they are standardized to a high degree for 56% of the sample in low risk environment, 10% in moderate risk environment and 0.00% in high risk environment.

To this end, one can conclude that the characteristics of the local market are such that the considerable autonomy enjoyed by the subsidiary in the area of pricing decisions is not in doubt. The parent company cannot play an important role in pricing decision making of the subsidiary in as much as it cannot quickly control the local market.

Communication Decisions- Advertising and Promotion

As can be seen from table 3, decisions relating to advertising and promotion are significantly centralized in

low risk environment, and less centralized for moderate risk environment. As for the high- risk environment, decisions relating to communication are significantly decentralized.

The degree of centralization of communication decisions in the three different market environments bears out of this affirmation. For instance, communication related decisions are highly centralized for 35.3% for moderate risk environment, 58.0% for the low risk market environment and 0.00% for the high-risk environment. Thus, the circumstances and peculiarities in local environment affect the centralization of communication decisions.

Distribution decisions

MNEs in Nigeria maintained decentralized approach to distribution decisions than those operating in Europe / USA and South Korea. On the one hand, MNEs operating in Europe and USA maintained a centralized approach to distribution decisions. On the other hand, MNEs in South Korea maintained a less centralized approach to distribution decision. For those operating in Europe and USA, about 68.3% maintained a centralized approach while about 36.1% of those operating in South Korea adopted a centralized strategy. However, those operating in Nigeria maintained 0.00% of centralized strategy.

This comparative analysis of the results of the three studies clearly indicate that distribution decisions are globally more centralized in the low risk environment, less in the moderate risk environment and the least centralized in the high risk environment.

Conclusion

The comparative analysis of results of the three studies undertaken in the three different market environments shows that the resolution of the problem of marketing decisions making within an MN firm is shared between two vital strategic necessities- the adaptation of environments and global uniformity. The extreme cases for centralization and decentralization were rare.

These strategic problems can only be sorted by punctual and temporal solutions according to individual cases. None of the enterprises in the three market environment used either complete centralization (or decentralization) strategy or complete standardization or differentiation.

However, the tendencies drawn seem to favor integration of a marketing mix element than others. Adopting a diagram used by Ahn et al (1987) by representing it on two axes- the need of integration (for global competitiveness) on one hand and the need for national adaptation on the other hand by decomposing them into high, average and low, one can position very

Table 3: Percentage of Total Marketing Decisions Highly Centralized in the Three Different Global Market Environments.

Marketing Decisions	Low Risk Environment	Moderate Risk Environment	High Risk Environment
Product	86.00	67.00	54.27
Physical characteristics	86.00	62.80	58.68
Brand name	86.00	63.60	54.55
Packaging	86.00	63.90	49.59
Price	21.50	1.90	0.00
Retail price	29.00	0.00	0.00
Manufacturer margin	14.00	4.60	0.00
Communication	32.75	2.60	0.00
Advert	38.00	4.50	0.00
Sales promotion	9.00	0.00	0.00
Media buget	14.00	0.00	0.00
Distribution	18.00	0.00	0.00
Roles of sales force	14.00	0.00	0.00
Sales force management	14.00	0.00	0.00
Channel select & control	19.00	0.00	0.00
Channel functions	19.00	0.00	0.00
Number of sales point	24.00	0.00	0.00

Table 4: Proportion of the degree of integration and adaptation of marketing in the three different market environments

Marketing Mix Element	Low Risk Environment		Moderate Risk Environment		High Risk Environment	
	Integration (%)	Adaptation (%)	Integration (%)	Adaptation (%)	Integration(%)	Adaptation (%)
Product	85.00	8.7	59.00	11.00	5.60	93.32
Price	39.00	4.4	5.00	64.00	0.00	0.00
Communication	45.00	3.7	19.00	58.00	0.00	0.00
Distribution	43.00	3.7	18.00	72.00	0.00	0.00

dearly the marketing strategies to the four elements of mix(See table 4).

In order to position the marketing decisions relating to the 4 elements and the totality of the marketing programme in the 2 way matrix, the study has determined the integration and adaptation need by calculating the proportions of centralized and standardized decisions on one hand (integration need) and decentralized and differentiated proportion (national adaptation need) on the other. The results are shown in table 5.

One can observe from Table 5 that the integration strategy of product decisions is uniform and high in the three market environment while that of the price are less uniform and not as high. The communication and distribution strategies vary from high integration (USA and Europe) to average integration (South Korea) and to low integration (Nigeria). As for the totality of marketing programmes, the low risk environment is found in the quadrant VI (average adaptation needs, high integration needs), the moderate risk environment is found in case. VIII (average adaptation need, average integration

needs) and finally the risk environment is found in quadrant VIII (high adaptation needs, low integration needs).

From this, one can take some generalization within the context of present thinking on globalization of MN marketing. Within the established findings in this study, marketing decisions relating to product element lend themselves to globalization. This study does not highlight that the other marketing mix elements (price, communication and distribution) follow the same pattern. The main reason is that the Nigerian economy is less deregulated and that its- socio cultural and political peculiarities are very pronounced. Nigeria as well as South Korea prefers high need for adaptation as far as integration strategies are concerned. On the other hand, more liberal less socio- culturally distant western countries require stronger need for integration and less need for differentiation.

Furthermore, one can hypothesize that as the Nigerian economy develops progressively by modernizing its industrial sector; its market would become more

Table 5: Positioning of Marketing Strategies in the Three Marketing Environments

National Adaptation Needs	Integration Needs		
	Low	Average	High
Low Average			Product (low Risk Environment) USA / EUROPE Product (moderate risk environment) S/KOREA)
High	Product (moderate risk environment) communication (high risk environment) distribution (high risk environment NIGERIA	Communication (moderate risk environment) distribution risk environment) S/ KOREA)	Price (low risk environment) communication (moderate risk environment) product (high risk environment

globalized and thus calls for a strong integration in the management of MN firms and subsidiaries, without always abandoning the adaptation needs. This means, one may witness a complex growth in the relationship between the headquarters and subsidiaries. In the nearest future.

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