

Development strategy for creative industries ‘cloth endek’ in Bali Province (Indonesia)

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ABSTRACT: The aims of the study are a) to identify opportunities / threats that may affect the environment of cloth endek creative industries b) to identify strengths / weaknesses of the internal environment of Cloth endek industry, c) to formulate the most suitable strategy for cloth endek creative industries and d) to implement the strategy for the creative industry of cloth endek sub-sectors in Bali. The study located in five regencies in Bali as the center of cloth endek industry namely: Karangasem, Klungkung, Jembrana, Gianyar and Denpasar. Sampling system used was Purposive sampling with particular consideration. In every regency, 5 entrepreneurs are taken as sample so that the total entrepreneurs used as respondents is 25 people. Interviews were conducted with Delphi method. Data analysis technique using SWOT analysis and IE Matrix to determine the position of the cloth endek industry in Bali. Based on Internal and External Matrix, the company's current position is in quadrant V (stability) while in the future is predicted to be in quadrant I (grow and build). The suitable strategy to be implemented is the marketing development strategy as in looking for a larger market for existing products. Operationally, it can be conducted by marketing the products to new geographical regions in Indonesia using by promotion through marketing mix communications and social media.

Keywords - development strategy, creative industries, cloth endek, grow and build.

I. INTRODUCTION

The development of the industrial sector in Indonesia from year to year is encouraging, with a rise in the growth rate of 2.19% in 2010 to 2.32% in 2011 [9]. Economy in Bali in the second quarter of 2013 grew by 2.18% compared to the first quarter of 2013. This growth was driven by all sectors except the construction sector. One of the growing sectors is the industrial sector. Weaving industry especially ‘tenun ikat’ is one of the growing industries. This is indicated by the increase of function crafts usage in Bali, in which one of them is the use of it as delegates clothing from various countries during the APEC conference in Bali in 2013. Tenun ikat Bali industry which is often called “kerajinan” is one of the creative industries that are able to maintain the culture of Bali. Therefore, it needs to have unique value.

There is potential based on local genius needs to be respected, adopted, and embodied in the creative economy program creative industries are mostly associated with government efforts to reduce unemployment, poverty and income distribution improvement rather than as exports stimulant, sources of investment or regional economic development. Creative industries is associated with culture representation of the area, therefore having the traditional design in the industry can reflect those particular area better [10]. Cloth endek industry is one of the industries that able to reflect a certain areas as Bali in particular. Investing in local culture will help local communities both socially and economically to develop [2]. Commonly found obstacle in the handicraft industry is the difficulty of developing a unique woven, both in terms of appearance and the manufacturing process. Traditional woven products frequently encountered productivity/manufacturing problem in fulfilling a very high demand. In the creative industries competition, in terms of design in particular, innovation holds the key role to branding improvement and it is something that needs to be developed.

Given such importance of endek industry as one of the creative industries in Bali, it is necessary to design the development strategy to win the competition with other competitors both nationally or worldwide. Based on the background issues that have been presented, the aims of the study are: a. to identify the external key factor that can be opportunities or threats for the performance of the creative industries (cloth endek industry) in Bali Province, b. to identify the internal key factor that can be a strengths or weakness f or the performance of the creative industries (cloth endek industry) in Bali Province, c. to formulate the suitable strategy for the creative industries (cloth endek industry), d. to formulate marketing strategy, especially in the cloth endek industry in Bali Province.

II. LITERATURE REVIEW

2.1 Creative Industries

The creative industry is a group of industry group which consists of various types of industries which has relationship with the exploitation of creative ideas and intellectual property that makes high-value economy that can create prosperity and job opportunities. Ministry of Commerce of the Republic of Indonesia classifies creative industries: (1) advertising, (2) architecture, (3) art market and antiques, (4) crafts, (5) design, (6) fashion, (7) video, film and photography, (8) interactive games, (9) music, (10) performing arts, (11) publishing and printing, (12) computer services and software, (13) television and radio, (14) research and development. The development of creative industries in fashion requires a grand design and benchmarking approaches made by establishing creative industries. Creative industrial design stage in fashion consists of the determination of the vision, key objectives, catalysts, supporting aspects, the creative industry cluster approach to the field of fashion. In the operational stage, then the output of the design is the plan of action (action plan) development of creative industries fashion field.

2.2 Strategy, Vision and Mission

Strategy is a long-term goal of a company, as well as the utilization and allocation of all needed resources to achieve its goals. Strategy as a tool to create competitive advantage and a tool to achieve its goals. A tool that is responsive to opportunities and threats based on strengths and weaknesses of the company in order to create an action through company policies both long term and short term.

The vision of a company is an aspiration of the desired future state to be realized by the entire personnel of the company, starting from the top level to the bottom. David [3] states that the ideals of the future in the minds of the founders which represents all members of this company are referred as vision. The next step is to create a mission. Kotler and Armstrong [5] states mission is an explanation in writing of the vision so that vision became an easily understood or apparent to the entire staff of the company. The goal is a qualitative statement regarding the circumstances / results to be achieved in the future.

2.3 Understanding the Environment of a Company.

Environment consists of the company's internal environment and the external environment. Whereas the external environment greatly affects the survival of the company. David [3] divides the external environment on three interrelated categories: the remote environment, the industry environment and the operating environment. The entire environmental factors provide a number of opportunities and threats for the company. The external environment consists of factors that come from outside the company, in which the external environment is divided into three interrelated sub-categories that factors in the remote environment, factor in the industrial environment as well as factor in the operational environment.

2.4 Planning strategy and selection strategy

Planning strategy is defined as activities of the company to seek conformity between internal forces or external forces companies (opportunities and threats) of market. The activities include appropriate observation of the competition, regulation rate of inflation, business cycles, desires and expectations of consumers as well as other factors that can identify opportunities and threats. Stages in planning strategy includes the step of data collection, data analysis and conclusions.

Application to determine the main strategy is based on the concept of David [3]. It can be conducted by selecting some models of matrix, They are: SWOT Matrix (Strength Weakness Opportunity Threat), SPACE Matrix (Strategic Position and Action Evaluation), BCG Matrix (Boston Consulting Group), GE Matrix (General Electric), IE Matrix (Internal-External) and Grand Strategy Matrix.

2.5 Level Strategy

In a company there are three levels of strategy. The corporate strategy is the strategy in a business, which the company will compete by altering the distinctive competence into competitive advantage. Business unit level strategy, strategy at this level is more directed at the management of the activities and operations of a particular business. Functional levels strategy is a strategy that is more operational led to the framework corporate functions (traditionally consist of research and development, finance, production and operations, marketing, personnel or human resources) which can support the strategy of the business-unit level.

III. RESEARCH METHOD

The population in this study is decision makers in the crafting company in central of cloth endek industry that is concentrated in five cities as in Gianyar, Klungkung, Karangasem, Jembrana and Denpasar. In each regency five companies were involved with the total of 25 companies. The owner or policy maker of each

company is involved as respondents therefore the total respondent is 25 people. Involved companies is determined by purposive sampling based on certain considerations as in 1) Cloth endek entrepreneurs that operates in the province of Bali, 2) policy makers in the company and 3) has wide knowledge of the industry condition both internal and external.

Accurate information is needed to determine the actual conditions. Information is obtained from primary and secondary data. The data collection method used is the field research method, as in direct visit to the company owner or the policy makers. Interviews was performed using the Delphi method that consists of three phases: 1) identifying key variables both internally and externally that affect the performance of the company, 2) determining weight (rate of interest) for each variable, 3) conducting an assessment of the key variables which affects the performance of the company (with a score of 1 to 4) The data analysis technique used in this study is Strategic Internal and External Factors (IE) Matrix. This analysis is used to identify the various factors systematically in order to formulate suitable strategy for the institution. This analysis is based on the logic that can maximize strength (strength) and opportunities (opportunity), while simultaneously minimize weakness (weakness) and threats (threat).

IV. RESULTS ANALYSIS

Characteristics of the respondents by sex, level of education and regency of cloth endek entrepreneur showed that respondents are dominantly male (76 percent) and 24 percent of women. Education background of the respondent are 40 percent of high school graduates bachelor, 24 percent of elementary graduates and 12 percent of junior high school graduates. About 80 percent of the respondent is the owner and 20 percent is marketing manager.

4.1 Analysis and Diagnosis of Current External Strategic Environmental

In order to conduct analysis of the external environment ,in which opportunities and threats, interviews was conducted to 25 people policy makers of the cloth endek company in the Regency / City in Bali and 10 key external variables was identified. Further analysis is determining the size of the effect or the weight of each variable and the value (rating), which reflects the condition of each variable. Last analysis is to merge weight with the rating in order to describe the general conditions of cloth endek craft in Bali Province has an opportunity or a threat.

Weighting of each of the variables, it appears that there are three factors that have the greatest influence to company performance. Those influenced are the attitude of society towards the creative industries, cloth endek in particular, with a weighting of 0,13 (13 percent), government regulations and “dynamic changing in society taste” factor by 12 percent, and competitor factor weight by 11 percent. The other seven factors weight varies between 7 and 10 percent.

Rating is the respondents' perceptions toward the level of importance from each factor affecting the company performance. Rating is valued between 1 and 4. As shown in Table 1, there are six factors that represent an opportunity as in 1) the level of per capita population of Bali, 2) the rate of economic growth in the area of Bali, 3) government regulations, 4) security and stability, 5) the attitude of society towards the creative industries, in Cloth endek in particular, and 6) information technology. In the other hand, there are four factors that a threat which is 1) inflation, 2) competitors, 3) dynamic changing in customer taste, and 4) bargaining power with suppliers.

Further calculation is to determine the weighted value by multiplying the weight and the rating of every indicator. Overall calculation in weighting value resulted in total value of 2,80. This figure shows that the external conditions in Bali Cloth endek industry is categorized asan opportunities since 2,80 value is greater than 2,50. Total score between 1,00 to 2,50 indicating threats and from 2,51 to 4,00 indicating opportunities. Detailed results on weights, ratings and weighted values are presented in Table 1 EFAS (External Factor Analysis Summary).

Tabel 1. Current External Factor Analysis Summary

No	Opportunities / Threats Factor	Weighting	Rating	Score
Opportunities				
1	Income percapita of Bali population	0,09	3,20	0,29
2	The rate of economic growth in the area of Bali	0,08	3,10	0,25
3	Government Policy	0,12	3,50	0,42
4	Security and stability	0,09	3,10	0,28
5	Society attitude toward the creative industry, cloth endek in particular.	0,13	3,40	0,44
6	Information Technology	0,07	3,15	0,22

Threats				
7	Inflation level	0,09	2,10	0,19
8	Competitor	0,11	2,00	0,22
9	Dynamic changing in customer taste	0,12	2,20	0,26
10	Bargaining power with suppliers	0,10	2,25	0,23
Total		1,00		2,80

Source: Processed Data

4.2 Analysis and Diagnosis of Future External Strategic Environmental

The next step is to perform assessment to the future prediction of the external strategic environment that could affect the company's performance (viewed from the economic environment, government policies, social factors and dynamics of the industry aspect). As a result of the predictions made by the respondents, it can be known that the government regulation factor has most influence on corporate performance, weighed by 0,14 (Table 2). The second largest variable is the attitude of society towards the creative industries in particular cloth endek, weighed by 0,13. The third variable largest is level of income per capita of Bali population, weighed by 0,12.

Afterwards, the prediction of assessment/perception to future external strategic environment that could affect company's performance is conducted.

The indicators that have the highest rating with a rating of 3,65 is government regulation, while the second is the attitude of society towards the creative industries in especially cloth endek with ratings of 3,60 and stability and safety factor with a rating of 3,5 (Table 2).

Table 2. EFAS (External Factor Analysis Summary) for the foreseeable future.

No	Opportunities / Threats Factor	Weight	Rating	Score
Opportunities				
1	Income per capita of Bali population	0,12	3,30	0,40
2	The rate of economic growth in the area of Bali	0,08	3,30	0,26
3	Government Policy	0,14	3,65	0,51
4	Security and stability	0,08	3,50	0,28
5	Society attitude toward the creative industry, Cloth endek in particular.	0,13	3,60	0,47
6	Information Technology	0,10	3,30	0,33
Threats				
6	Inflation level	0,07	2,40	0,17
7	Competitor	0,09	2,45	0,22
8	Dynamic changing in customer taste	0,12	2,20	0,26
9	Bargaining power with suppliers	0,10	2,25	0,23
Total		1,00		3,09

Source: Processed Data

Further step is to determine the weighted value of each indicator by multiplying the weight and the rating. From the calculation of the weighted value of overall indicator it showed a result value of 3,09. This figure shows that the external conditions of creative industries, Cloth endek in particular, in Bali is an opportunity due to the value is greater than 2,50, whereas the total score between 1,00 and 2,50 indicating threats and from 2,51 to 4,00 indicating opportunities. Detailed results of prediction weights, ratings and weighted values are presented in Table 2. EFAS (External Factor Analysis Summary) for the foreseeable future.

4.3 Analysis and Diagnosis of Current Internal Strategic Environment

Interviews with respondents was performed, in which 12 indicators is identified (Table 3). This indicator is the derivative of the five functions within the company. Interview results showed that lack of access to sources of capital factor has the greatest influence on the performance of companies with a weight of 0,13 (13percent). The second largest factor is uniqueness feature in the goods with weights of 0,11. The third factor is 'the cultural heritage of Bali 'title, the professional labor and product innovation with weights of 0,08. Another factor weighs with a variation between 0,07 and 0,10.

By providing rating assessment to the 12 indicators, it appears that having uniqueness feature in the goods has the highest rating of 3,60; the second highest is the quality of the product with a rating of 3,50 and the third highest is the affordability with rating 3,45. The other indicators are in the range of rating value of between 2,00 and 3,40.

The last stage is the determination of the weighted values by multiplying the weight by the rating. The calculation gives total result of 2,95. This figure shows that the internal conditions of Endek in Bali handicraft industry in general is strong because it is greater than 2,50, whereas the total score between 1,00 and 2,50 indicating weak and 2,51 to 4,00 indicating strong. All calculations of weights, ratings and weighted values are presented in Table 3 Internal Factor Analysis Summary.

Tabel 3 Current Internal Factor Analysis Summary (IFAS)

No	Weakness and strength factor	Weight	Rating	Score
Strength				
1	Product quality	0,10	3,5	0,35
2	Unique feature	0,11	3,6	0,40
3	The cultural heritage of Bali	0,08	3,4	0,27
4	Affordable price	0,07	3,45	0,21
5	Promotion	0,07	3,0	0,21
6	Business Productivity.	0,08	3,40	0,24
7	Raw Material quality	0,07	3,30	0,26
8	Professional labor	0,08	3,30	0,26
Weakness				
9	Access to source of capital	0,13	2,20	0,29
10	Support from "litbang"	0,07	2,00	0,14
11	Workforce quantity	0,07	2,20	0,15
12	Product innovation	0,08	2,10	0,17
Total		1,00		2,95

Source : Processed Data, 2015

4.4 Analysis and Diagnosis of Future Strategic Internal Environment

The purpose of the predictions is to estimate the future conditions of internal indicators (2016-2020) based on respondents perspective, therefor appropriate strategies can be designed. Table 4 shows the calculation of the weights, rating and the weighted value of the key internal strategic factors that affect the company's performance. The factors that have the highest weight is access to venture capital with a weight of 0,13. The second highest factor is having a unique feature in the goods with a weight of 0,12. Third largest factor is ' the cultural heritage of Bali ' title with a weight of 0,10. Other factors have weights ranging from 0,06 to 0,09 that sums up total indicators to 1.

Afterwards, the prediction of the level of each rating factor is performed by respondent. From the calculation of the average, unique feature factor that has the highest rating of 3,85. Business productivity factor, raw materials quality and professional labor share the second highest rating of 3,80. Meanwhile affordable price factor has the third highest rating of 3,75. Detailed information is shown in IFAS Table as in Table 4.

The calculation result of the weighted value for overall indicator is 3,31. This figure shows that the future internal conditions of Cloth endek is strong generally because it is show value greater than 2,50, whereas the total score between 1,00 and 2,50 indicating the weak and 2,51 to 4,00 indicating strong or have a high level of strength .

Tabel 4. Future Internal Factor Analysis Summary (IFAS)

No	Weakness and strength factor	Weight	Rating	Score
Strength				
1	Product quality	0,09	3,73	0,34
2	Unique feature	0,12	3,85	0,46
3	The cultural heritage of Bali	0,10	3,60	0,36

4	Affordable price	0,08	3,75	0,30
5	Promotion	0,06	3,65	0,22
6	Business Productivity.	0,07	3,80	0,27
7	Raw Material quality	0,07	3,80	0,27
8	Professional labor	0,08	3,65	0,29
Weakness				
9	Access to source of capital	0,13	2,50	0,33
10	Support from litbang	0,07	2,40	0,17
11	Workforce quantity	0,07	2,40	0,14
12	Product innovation	0,08	2,45	0,17
Total		1,00		3,31

Source : Processed Data, 2015.

4.5. Strategic Position of Creative Industry, especially Cloth Endek in Bali.

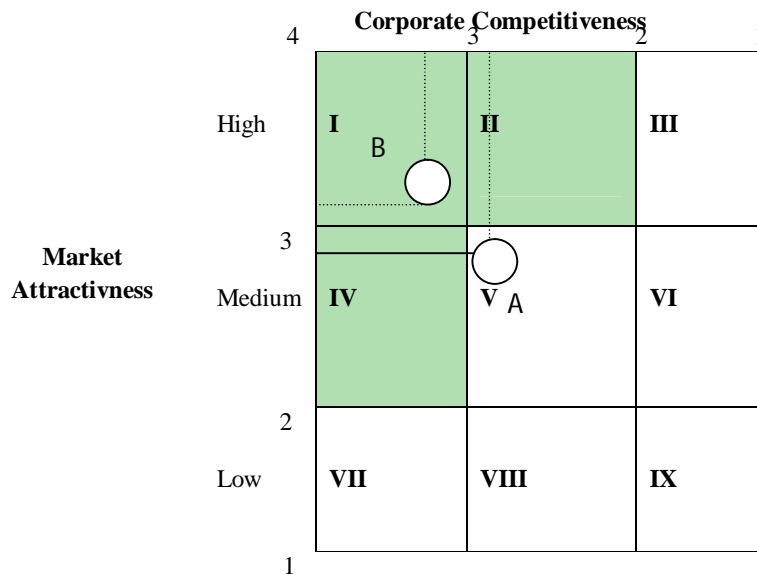


Figure 1
Market Attractiveness – Corporate Competitiveness Matrix for
Strategic Position of Creative Industry, Especially Cloth endek,
in the present (2015) and foreseeable future (2016-2020) in Bali Province.

Determination of company's strategic positioning is conducted after analyzing the internal and external environment by moving the total value of the weighted average into the Matrix Market Attractiveness - Corporate Competitiveness. Weighted average value (total weight score) for Current (2015) EFAS is 2.80 while for Current IFAS is 2.95, therefore the company's position in the matrix is in Cells V (A). For the foreseeable future (year 2016-2020) of IFAS and EFAS score is 3.09 and 3.31, therefore its position is increased in cells I (B). It is shown as in Figure 1.

Figure 1 show the position of the current business (2015) 'Tenun Ikat' (cloth endek) is in V cells which indicate "hold and maintain" position, therefore the strategy that can be taken is to conduct market penetration and product development. For the foreseeable future (2016 - 2020) business position of cloth endek industry is in quadrant I, in which the strategy that fit is a strategy to grow and build.

V. IMPLEMENTATION STRATEGIC AND MARKETING STRATEGIC ON CLOTH ENDEK CREATIVE INDUSTRY IN BALI

As shown in Figure 1, the business position of cloth endek in Bali for foreseeable future between 2016 and 2020 is in Quadrant I (grow and develop). Suitable strategic for this quadrant is intensive strategy, market development strategy and integration strategy (backward integration, forward integration and horizontal integration).

5.1 Intensive Strategy

Intensive strategy can be conducted by market penetration, in which seeking a greater share of the market for the existing products and services through more vigorous marketing efforts. Market penetration is breaching the existing markets by using a mix of marketing communications through advertising, sales promotion, personal selling and publicity. Ads can be done through the print and electronic media, as well as through social media either by creating websites, Twitter, Facebook and Instagram. Sales promotion can be conducted by giving bonuses, discounted prices, and participate in trade shows event such as the Bali Arts Festival. Personal selling can be conducted by promoting directly to consumers, institutions and social women society gathering known as “*arisan*”. Publicity can be conducted using free publication by collaborating with government officials visit to UKM centers.

5.2 Market Development Strategy

Market Development Strategy is reaching new markets with existing products that can be achieved based on geography and demographics aspect. Geography wise means cloth endek business can expand its market not only in existing region but also to a larger area. Demographics wise means business *ikat* (cloth endek) can develop its market to a wider demographic market for example consumers with higher income levels.

5.3 Integration Strategy

Integration strategy consist of backward integration by controlling raw material suppliers, forward integration by controlling the distributor or retailer and horizontal integration by seeking ownership or controlling over competitors. According to corresponding competitive strategy, in this case is intensive strategy, market development and integration strategy, if applied with mix marketing strategy, it can be formulated as follows.

Product strategy means products that are innovative and different should be produced, for example Cloth endek products with the features that characterize the uniqueness of the company's operating territory. Therefore, Cloth endek that is produced will have uniqueness compare from other areas in Bali. For example, cloth endek in ‘*Gringsing*’ area of Sidemen will be different with cloth endek from ‘*Makepung*’ area of Jembrana. Pricing strategy means offering competitive prices consistent with quality produced cloth endek. Pricing is determined by suiting the target markets served, for example premium price for the upper segment, and affordable price for lower and middle market.

Distribution strategy means more emphasis on the strategic locations in offering cloth endek. The strategic location should be taken into consideration in offering produced cloth endek to make it easier for consumers to get it. Promotion strategy means communicating the various types of products to the public through printed and electronic media. It can also be performed through social media (facebook, twitter or Instagram) to minimize costs. It is expected to have broader coverage and fewer costs.

VI. CONCLUSIONS AND SUGGESTIONS

6.1 Conclusions

Based on the analysis in the previous chapter on the internal and external strategic environment of creative industries businesses cloth endek in Bali, there are several conclusions as follows:

- a. External strategic key factors in which act as good opportunities in the present and in the future are the level of income per capita population of Bali, the rate of economic growth in Bali, government regulations, security and stability, the attitude of society towards the creative industries, especially cloth endek, and information technology.
- b. External strategic key factors in which act as threats both in the present and in the future are the level of inflation, competitors, dynamic changes in customer taste and bargaining power with suppliers.
- c. Internal strategic key variable in which act as strength of both the present and the future are the quality of the products, uniqueness features of the product, “It is the cultural heritage of Bali” tag, affordable price , promotion, business productivity, quality of raw materials and professional labor.
- d. Internal strategic key variable in which act as weakness are access to venture capital , support to research and development (R & D), the amount of labor and product innovation.
- e. According to the business position, cloth endek industry in Bali Province at the present time is in Quadrant V, whereas the future position is in quadrant I, therefore the suitable strategy is to grow and build strategies.
- f. The suitable competitive strategy for cloth endek craft industry in Bali is an intensive strategy, market development strategy and integration strategy (backward integration, forward integration and horizontal integration).
- g. According to corresponding competitive strategy, in this case the intention and market development strategy, it applied to the mix marketing strategy that is 4Ps of product, price, promotion and place.

6.2 Suggestions

It is suggested to entrepreneur 1) to innovate new products that emphasize culture of Bali to create uniqueness and difference from other Endek craft industry, 2) to cooperate (partnership) with other 'cloth endek' entrepreneurs to strengthen the promotional efforts in order to make 'cloth endek' known better by people all over Indonesia 3) to attend training carried out by government, especially the one that sponsored by BUMN and BUMD (stated own enterprise), in order to obtain information associated with access to financial resources, 4) to work with raw material supplier in order to produce 'cloth endek' with the best quality, 5) to provide best service to the customer satisfaction.

Suggestion for the government is 1) to help providing more access to the financial resource in order for the company to expand its business. 2) to help providing communication and information tools for promoting the product to wider area.

VII. RESEARCH LIMITATION AND FUTURE RESEARCH DIRECTION

7.1 Research limitation

This research only focused on industry 'cloth endek' in Bali thereby limiting the ability to generalize the findings of this study to a larger area. This study used a survey method in which the data is collected in a particular time or in cross section whereas the environments will very quickly changing, therefore it is important to perform another research in the future.

7.2 Future research

In future research, different study on craft businesses can be performed, in example study of handicraft business 'cloth endek' in Bali Province using qualitative analysis. It will need to add some new variables such as competitive advantage and firm performance, which can be used as a basis for the formulation of corporate strategy. This is consistent with results of studies that suggest that there is a relationship between competition and organizational performance [1 , 4 , 6, 7, 8, 10].

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