

The Dynamic of Courier Industry in Indonesia and Company's Response: A Lesson from PT XYZ Strategic Plan

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Abstract- Strategic management is a series of managerial decisions and actions that determine the performance of a company in the long term that consists of observations of the situations, strategy formulation, implementation strategies, and evaluation strategies. The purposes of this research are (1) to study the dynamics of a courier company in Indonesia related to the development of ICT and the rise of e-commerce business, (2) to analyze the conditions and the ability of PT XYZ, (3) to analyze industry foresight of PT XYZ, (4) to analyze the gaps between the results of industry foresight and policy PT XYZ in the future, and (5) to create a strategic action plan and estimated implementation time to minimize the gaps that would occur. The research method used was descriptive method with a case study approach using VRIO analysis, trend analysis, future strategies forecast, scenario planning, gap analysis phase and preparation of the action plans. VRIO analysis shows that most resources have a parity or competitive advantage, while the business trend analysis suggests that future business development is driven mainly by the development of information and communication technology (ICT) which has an impact on changes in many business processes. The development and strengthening of human resources would enhance the ICT system as well as the construct of new services in the cities that are integrated with web based and online real time shipment tracking systems as the main pillars of the action plan arranged for PT XYZ within the next five years.

Index Terms- strategic planning, strategic foresight, courier and logistics, crowdsourcing

I. INTRODUCTION

Until the end of 2014, courier and logistics market in Indonesia according to Frost and Sullivan (2014) in Rahayu (2014) gained around Rp 1,800 trillion, equivalent to 2014 State Budget (Rp 1,816.7 trillion). That number was reached with estimated growth of logistics business in the year 2014 at 14.7%. The average annual growth of industrial logistics and shipping goods in Indonesia, referring to Masita (Association of Indonesian Logistics) in Rahayu (2014), is around 15% per year. Business in courier and logistics is generally managed by small and medium scale companies, so many people categorize this business as the fragmented business, meaning that no company

has a truly large and dominating market share that could affect the policy direction of the courier industry and logistics.

Business players focusing on logistics and express delivery are dominated by several familiar names, such as Cardig Express Nusantara, FedEx/RPX, JNE, TNT, TIKI, Pandu Logistics and PCP. In fact, the attraction offered by this industry has been encouraging non logistics companies to enter into this business, both private companies, state-owned companies, and consumer retailers, let us say TRAC, Cipaganti, Pelindo, Garuda Indonesia, Kereta Api Indonesia, Alfamart, Alfa Express and Atri Distribution. Another phenomenon is the emergence of some online app based companies as Go Jek, Go Box, Grab Bike, Grab Taxi, Uber Taxi, Lady Jek, etobee that are also interested in this market, and their number will continue to grow in the future. In the beginning, this type of companies paid less attention to the logistics industry, in particular courier services, except etobee, but as time went by, they transformed into companies that provide courier services as well as dropping off passengers. Such a condition does not arise immediately, but is driven by the logistics business attraction in Indonesia.

One of factors driving the significant growth of service businesses and logistics in Indonesia is the growing e-commerce business currently that demands delivery of products retail from customer to customer and a company to customers and this activity needs to reach many destinations. Kadrial (2015) stated that by 2015, the internet users in Indonesia reached 93.5 million users, while those utilizing online shopping reached 7.4 million people and will continue to grow significantly in the coming years. This is supported by the data from the Ministry of Communications and Information of the Republic of Indonesia as cited from Kadrial (2015), that the transaction value of e-commerce market in Indonesia in 2013 was up to Rp 130 trillion. The increasingly tight business competition is underlied by diverse factors, especially the penetration of new competitors, and the increasing demands of customers for a satisfactory service, as well as the more critical corporate customers who put forward efficiency and reduction of shipping costs; those factors contribute to the stagnation in the business development of PT XYZ. The drop in profits is assumed to occur because of the increasing rate of operating costs every year, especially the cost for land and air transports as well as personnel costs. Such an increase is not balanced with the increase in the selling price.

A high margin for the retail delivery, cash payment during transactions, the openness of retail market in Indonesia, and companies' desire to improve the quality of service to customers

as several steps of the companies to maintain their business in the future, have forced the company's management to do analysis on strategic methods to improve the company performance which tends to be less satisfactory in the last 4 years, as well as to capture the huge market opportunities in the retail sector, especially from e-commerce.

Strategic planning is very vital to do by PT XYZ to embody the company's profile in the upcoming years, and this idea is in line with Prahalad and Hamel (1990) who mention strategic planning as a series of chains linking short-term plans and long-term plans, and to show the organization what capability is to be built, which consumer groups are targeted, what process should start, and what should be the priority activities to be carried out from now on, and all of these activities are meant to deal with business in the future era.

The purposes of this research are (1) to study the dynamics of courier companies in Indonesia related to the development of ICT and the rise of e-commerce business; (2) to analyze the conditions and the ability of PT XYZ; (3) to analyze industry foresight of PT XYZ; (4) to analyze the gap between the results of the industry foresight and policy directions committed by PT XYZ in the future; and (5) to create a strategic action plan and estimated time to minimize the possible gaps.

II. RESEARCH METHOD

This research was limited to the formulation of a strategy based on a case study on PT XYZ by involving top management of the company as an internal party, while as the external parties,

this study engaged key persons from the company's competitors and actors in the retail business and corporate customers of PT XYZ. The research was undertaken in the headquarter of PT XYZ in Jakarta. The selection of PT XYZ was done intentionally based on the formulation of the problems. The reasons were data availability and willingness of the company's management to be examined. Data retrieval was performed in February 2016 until April 2016.

The research was carried out by the descriptive method with case study approach of strategic planning of PT XYZ. There were two data sources: (1) primary data obtained from the questionnaire, in-depth interviews and focused group discussion, and (2) secondary data obtained from literary studies, journals, books, and other data sources.

The research used a descriptive method with case study approach using VRIO analysis (Weikelet al. 2000), trends analysis (Castorenaet al. 1995), future strategy forecast (Hammound and Nash 2014), scenario planning (Blyth), gap analysis phases and shapping the future to face the upcoming competition environment (Hammound and Nash 2014).

The sampling technique in this research was a non probability sampling (sampling without odds) with a purposive technique. Respondents selected were key persons of PT XYZ that understand and are currently working at senior management level, whereas the criteria for external respondents are executives of other companies (competitors) having similar business types and customers of PT XYZ as presented in Table 1.

Table 1 The List of Key Respondents

Key Respondents	Organization	Description
CEO	PT. XYZ	Internal
Director	PT. XYZ	Internal
Commercial GM	PT. XYZ	Internal
Managing Director	Pandu Express	External
Founder	DOKU Payment	External
Mr. XX	Customers of PT XYZ	Executive/External

Techniques of Data Processing and Analysis

The data obtained were analyzed qualitatively and quantitatively, and presented in the form of tables, images and matrix. Processing and analysis of data were done in several stages as follows:

1. Identification and evaluation of current business condition and ability of PT XYZ (environmental scanning) by way of field data collection through questionnaire, interviews with key expert informants, and also secondary data collection related to the research.

2. The results of data evaluation and identification were analyzed and further evaluated through focused group discussion, using future wheels and scenario planning analysis methods.

3. The results of formulation of the strategic planning outcomes combined with the foresight method, were compared to the current condition and an action plan was prepared to anticipate the gaps found in the data.

III. RESEARCH RESULTS

Analysis of the Internal Factors

Analysis of the internal factors is worth to do by the company management as it provides guidelines for the company regarding the current organization structure and corporate culture as either the strength or weakness of the company associated with the company's current strategy to come and help the company identify the competitiveness level of the company, human resources capabilities, technology used by the company to support the business process, financial resources, and the significance of management role in the company's activity (Hellriegel and Slocum, 1992) in Baynes (2005).

Table 2 Recapitulation of VRIO Test Analysis on Internal Elements of PT XYZ

Criteria	Valuable?	Rare?	Costly to Imitate?	Organized?	Status
<i>Driver dan Biker</i>	Yes	No	No	No	<i>Competitive parity</i>
<i>Kiriman laut door to door</i>	Yes	No	No	No	<i>Competitive parity</i>
Jumlah dan kualitas armada	Yes	No	No	Yes	<i>Competitive parity</i>
Jenis armada	Yes	No	No	Yes	<i>Competitive parity</i>
<i>Kiriman udara door to door</i>	Yes	No	No	Yes	<i>Competitive parity</i>
<i>Kiriman darat door to door</i>	Yes	Yes	No	No	<i>Competitive parity</i>
Sumber daya manajemen	Yes	Yes	No	Yes	<i>Temporary competitive advantage</i>
<i>Web based track and trace system</i>	Yes	Yes	No	Yes	<i>Temporary competitive advantage</i>
<i>Real time online delivery status</i>	Yes	Yes	Yes	No	<i>Temporary competitive advantage</i>
Cabang milik sendiri di 34 kota utama	Yes	Yes	Yes	Yes	<i>Sustained competitive advantage</i>
Menjangkau > 3000 kota kecamatan tujuan	Yes	Yes	Yes	Yes	<i>Sustained competitive advantage</i>

Lin et al. (2012) introduced VRIO (Valuable, Rareness, Costly to Imitate and Organized to captured value) based research framework to evaluate the company's internal activities. The illustration of result of VRIO concept analysis in this study refers to the model proposed by Weikelet al. (2015). The recap of VRIO analysis results on the resources owned by PT XYZ is presented in Table 2. Most resources have a competitive advantage parity or considered having no advantages compared with other similar companies, but there are resources that have a temporary competitive advantage, such as information and communication system in use today. The respondents revealed that only service networks can be categorized as a sustainable competitive advantage.

The company has branches in 34 major cities and can reach more than 3000 districts of shipping destinations, and this is currently seen as a sustainable competitive advantage by the respondents; however, in the future, this condition could change. Over time, other companies will be able to build a network of services similar to that of PT XYZ. Hence, it is expected that PT XYZ should continue to develop the existing network wide to reach the corners of Indonesia and such strategy can be done by the company itself or by involving strategic business partners for providing mutual benefits.

Analysis of External Factors

External audit reveals the opportunities and threats faced by companies due to factors beyond the control of the company, so that they can formulate strategies to take advantage of the opportunities and avoid or reduce the threats (David 2013). The

methods of analysis used to analyze the external environment of PT XYZ trend analysis are suggested by Castorena et al. (2013) that include variables of technology, product and market, competition and business models, and rules (laws).

In terms of ICT widely applied to shipping services and logistics companies, the trend is to use the ICT system which facilitates operational processes, both shipment management process in the warehouse, and the process of delivery. In some middle low companies, the ICT system is mostly a database system that is less interactive. Only a small percentage of companies that have already implemented a web based system for tracing and tracking. Costs and business scale become the constraints of most companies implementing a web-based ICT system. Some shipping services company and logistics from abroad, already implement ICT systems which are more advanced, integrated between operational processes, marketing, finance and customer service by providing online real time data for each stage of the work.

The future trend of the ICT system in this field is the use of ICT accessed via mobile phones/gadgets. This happens because of the trend of using smart phones and the ease of internet access, coupled with the needs of customers on information that must be provided by the company through one click access.

The impact of ICT development, the availability of internet connections in many countries as well as the more conducive trade rules between regions and countries, give rise to a new niche market called the e-commerce sector which is growing very rapidly, and results in more opportunities in courier and

logistics, that is also associated with real time online track and trace shipment, automation process, interaction and connectivity, cashless payment method and mobile applications. Other impacts that arise from the development of information and communication technology is the rampant use of mobile applications. This increase occurs along with the rise of cellular phone or app based wireless telephones called smartphones, the availability of cheap and fast internet connection, as well as the changing lifestyle of society.

The interconnectedness of ICT with the competitive advantage the company has been widely researched and one of the results is expressed by Dehning and Stratopoulos (2003), that information technology is believed to be a source of sustainable competitive advantages of a company. Also, the empirical evidence suggests that the role of ICT can improve the performance of the company and business competitive advantage level. Competitive advantages of the company because of the information and communication technology can be sustained when the technology is controlled by experienced management and protected from competitors.

Overall, the development of ICT indeed requires PT XYZ to do thorough evaluation on the direction of business processes to be performed, including the choice of utilizing resources of idle community as much done by current app based transportation companies. Crowdsourcing and crowdbusiness become the choices of many companies in the world today to meet the needs of interactions and resources and this could happen because of supported by the very rapid progress in the ICT. The term of crowdsourcing was first introduced by Merriam-Webster company of America, to refer the process of getting a job or funds made online from community groups (Bratvold 2014).

Shifts in customer markets because of the development of e-commerce business

World trade patterns continue to change as time passes and the most significant change in this regard is the emergence of online trading system or commonly referred to as e-commerce, namely activities that use electronic communications and digital information technology for creating, transforming and redefining the relationship between values of organizations, and between the organization and the individual and is usually associated with buying and selling through the internet (Andam 2003). Rapid development of e-commerce is powered by the spread of information and communication technology, including the development of mobile applications and the availability of cheap internet connection.

E-commerce development produces effects to another field, which is closely related with the current business activity, namely the service business with the increase in trades and services especially those dealing directly with customers. The increase also occurrence of virtual sales models that provide advanced impact on information and communication technology system, coupled with greater number of products for shipment by courier and logistics companies that certainly provide a longer time to society as consumers to stay at home with the family as long as they are shopping.

E-commerce system brings up virtual sales where the seller and the buyer do not meet physically and it does have an impact on the online payment system, with the bigger possibility of fraud

payment. This pattern also gives rise to a new operating system for e-commerce merchants to manage inventory, store products and deliver them to the customer.

Changes in the operating system associated with the quality of human resources and the availability of service network

Rapid developments in ICT system as well as the rise of e-commerce also provide an impact on the pattern of business operations by courier and logistics companies. The impact of such a pattern arises from the development of ICT system and e-commerce business. The e-commerce as one of the catalysts for the change of operating system of courier and logistics company promotes high customer demand toward courier activities, in particular individual shipping (small package) that takes a quick delivery (Yoshimoto and Nemoto, 2005). The greater volume of goods to be shipped is as the impact of the internet that makes the overall transaction costs become cheaper and the marketing program is right on target toward the B2C market which offers products to suit customer needs. This is managed by doing their own business operations or outsourcing them to a logistics service provider, in particular parcel delivery services (Yoshimoto and Nemoto, 2005).

Crowdsourcing is one alternative utilization of resources to be considered by companies. Crowdsourcing is the best way where an organization can make use of collaborating network to solve problems in terms of higher costs or labor intensive, while the organization does not have enough experienced resources (Misra et al. 2014). The use of crowdsourcing for transport is proved effective because the company is approaching a large group of people in the same platform to do the job at the time required (Misra et al. 2014).

Scenario Planning

Scenario planning or is a process that puts a variety of trusted information, and imagine how alternative future environment will be, so that decisions about the future can be run (Porter 1985); (Ringland 1998); (Schwartz 1991); (Shoemaker 1995) in (Chermack and Lynham 2002). The process of scenario planning at PT XYZ was done through the methods of in-depth interviews and FGD with respondents and the data presentation refers to Hurtado et al. (2015). The level of importance as well as the level of uncertainty were set to any strategies or topics of discussion.

Actions or strategies on A quadrant (16, 9, 8, 7, 5 and 1) must have a major concern and a specific action plan to be made in order to make it happen because the company badly needs them in the near future (high priority) and the process of accomplishments is easier because of the condition associated with the action or the strategy is more predictable (low level of uncertainty). Action or strategy variables in the A quadrant are:

- Number 16: Increasing brand awareness to get increased sales
- Number 9: Provision of reliable internet connections for real time data feeding
- Number 8: Development of Points of Sales (POS) mobile applications for customers of retail groups and e-commerce

- Number 7: Development of web-based track and trace system that is integrated with the financial management system and vehicle tracking system (GPS).
- Number 5: Modification of the type of courier services to be unique and meet the entire needs of the priority B2B customers group (pharmaceutical, electronics, mechanical engineering and financial institution)

- Number 1: Having skilled human resources at the level of implementation, like drivers, bikers and operational staff members and middle – low management level that has a good expertise in courier and logistics services business.

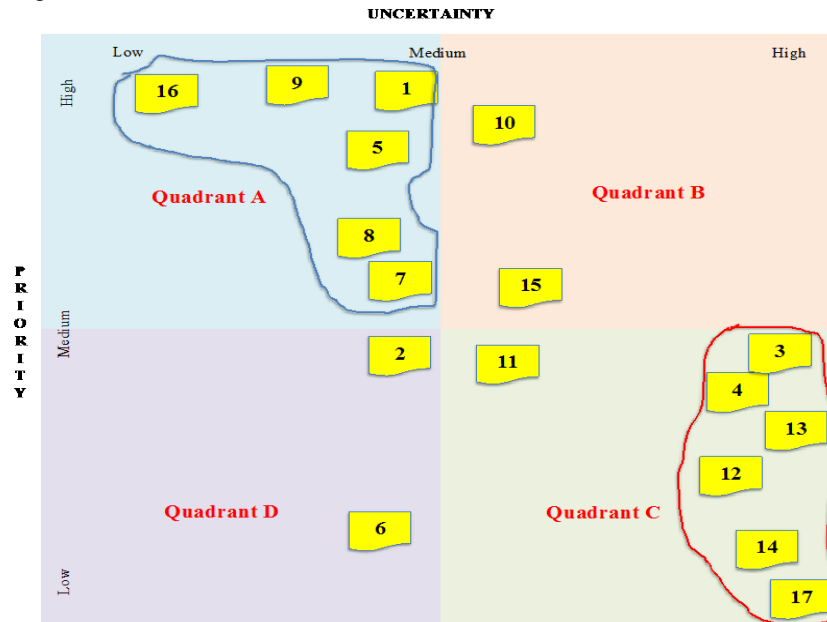


Figure 2 The placement of action/strategy variables at scenario planning quadrant

Group of action or strategy on quadrant C number 17, 14, 12, 13, 4, and 3 will be expected to do in the future and will face a huge challenge in the implementation, because the internal and external environments related to the action plan have a high uncertainty. The respondents also view such actions or strategies as having low to medium importance level to be implemented in the near future. For example, the application of operation automation and alternative robotic delivery (number 17) is quite hard to be realized because it requires advanced preparation and planning in other operational sectors and demands uniformity for some aspects such as the size of the shipment, type of packaging, labeling, service code, city code and others. The company's financial condition is also less able to finance the implementation of these strategies or actions in the near future because those demand very expensive costs. Action or strategy variables included in Quadrant C are:

- Number 17: Application of operation automation and alternative robotic delivery
- Number 14: Having ICT systems or applications that can integrate with independent service providers and

community groups which are idle, and usually are mobile based applications (crowdsource)

- Number 12: Possessing ISO 9000 certificate for fulfilling Standard Operating Procedure (SOP) across the service networks
- Number 13: Operating 1000 outlets or service counters scattered in every service city
- Number 4: All drivers and bikers are equipped with mobile phones for mobile applications updating shipment status
- Number 3: Track & Trace online system is available in 300 delivery service cities.

Gaps between the current and future conditions

Based on the results of analyses of internal and external environments, industry foresight, and the scenario planning against action or strategy variables on strategic planning of PT XYZ in the future, there are several gaps between the current state of PT XYZ and the expected future condition as shown in Table 3.

Table 3 Comparisons between current condition and expected future

Variable	Current condition	Expected future
(Group A) Technological	<ul style="list-style-type: none"> • Web based ICT track & trace system is already owned by PT XYZ. • The application of the new system is restricted to major 	<ul style="list-style-type: none"> • Implementation of web based ICT track & trace system is done in all service networks of PT XYZ • Another ICT system related with business activities of PT XYZ has been provided

	<p>cities and not all menus can be implemented.</p> <ul style="list-style-type: none"> • Another related web based ICT system is not available. 	<p>and integrated digitally to the track & trace system.</p> <ul style="list-style-type: none"> • Application programming interface (API) of ICT system in PT XYZ is able to do interfacing with varying forms of ICT apps of the customers and outsourcing partners • Development of Points of Sales (POS) of mobile applications for retail customers and e-commerce
(Group B) Product, market and competition	<ul style="list-style-type: none"> • The market segmentation of PT XYZ is at B2B. • Tight pricing competition among the business players due to relatively the same type of services • E-commerce demonstrates rapid growth. • Several app based companies and communities start to exist, such as Gojek, Grab Bike, Etobee, and others. • Low company brand awareness 	<ul style="list-style-type: none"> • Modifications on type of airfreight to be unique and meet all demands of B2B priority customer group (pharmaceutical, electronic, mechanical engineering dan financial institutions) • Operating 1000 outlets or service counters around Indonesia to grab e-commerce customers or B2C market groups • Competition is not only among current service providers but also from other parties as crowd sources like Uber, etobee, dll. • Good brand awareness through digital and social media
(Group C) Operations system	<ul style="list-style-type: none"> • Relatively the same type of services among service providers • Shipment handling and information status are manual. • There are only 48 cities serving integrated real time online track & trace system. 	<ul style="list-style-type: none"> • Scheduled land shipment which operates in the islands of Sumatra, Kalimantan and Sulawesi • The use of mobile phone to realize mobile applications updating shipment status • Implementation of operation automatization and alternative robotic delivery • Track & Trace online application system is available in 300 delivery service cities. • The opening of service network involves business partners and idle community through crowdsourcing. • Holding ISO 9000 certificate for fulfilling standard operating procedure (SOP) in all service networks
(Group D) Resources (Human, vehicles, capital, etc)	<ul style="list-style-type: none"> • Low quality of human resources at the level of implementation that include drivers, bikers, and operational staff members, including lower-middle managerial level • Limited transportation resources to meet the business expansion and most transports have been in use for more than 5 years • Availability of working capital is limited to business development that requires greater amount of funds in the near future 	<ul style="list-style-type: none"> • Existing human resources must have required skills in courier and logistics services • Resources from public in general require much understandable SOP through the app or ICT system that is integrated with idle community to crowdsource • Fulfilment of working capital and investment through business partners or crowd finance sourcing

Measurement of gaps was carried out to compare the current condition and future company performance toward each action or strategy variable. Among 17 action or strategy variables expected, 71% or 12 of them show that current condition is less good with readiness level below 30% from the expected future. The gaps between the current condition and expected future force PT XYZ to arrange a comprehensive and measurable action plan to ensure the variables can be implemented in the future.

Action plan

After getting an overview of the current state and compare it to the expected future, PT XYZ must do the follow-up by putting together mid-term action plan for each action or strategy variable which has been analyzed. The importance level and uncertainty level for each action or strategy variable were already defined by the respondents by combining the importance and the uncertainty level, the company could determine which action or strategy variable should be carried out first. The first priority (P1) of action plan of the variables indicates the highest importance level and the lowest uncertainty level.

Action plan has been drafted by the respondents to answer and manifest action or strategy variables expected in scenario planning. The process of determining the specific action plan for each of action or strategy variable was done through FGD mechanism. Respondents discussed it to reach an agreed action plan associated with each action or strategy variable in the scenario planning that will be implemented in the future. The time for implementing the action plan to be carried out was defined by respondents through FGD by taking into account the level of difficulty, the amount of resources needed, and the estimated time to carry out the action plan with the allocated resources. Development and strengthening of human resources, ICT system, as well as new services in cities that are integrated with real time online and web-based track & trace system become the main pillars of the action plan to be carried out by PT XYZ within the next five years.

IV. CONCLUSION

Resources owned by companies generally provide value for the companies. However, many resources considered to have an important role apparently have been unable to deliver benefits to support the companies' sustainable competitive advantage because the resources are replicable and owned by other companies as well. Of the many internal resources, PT XYZ only has resources in the form of branch offices which spread in 34 major cities and serve 3000 townships; those are internal resources which provide sustainable competitive advantages for the company, as rarely companies of its kind have the resources; in other word, the resources are uneasy to emulate because of being too expensive to emulate. Moreover, the company could manage this resource well so that the element provides a great benefit to the company.

The external condition of the company that strongly influences the development of future business of PT XYZ is the development of ICT that brings changes to many derivative business processes, either in the core business of PT XYZ, as well as other businesses either directly or indirectly. Crowdsourcing-based model and the development of retail

business of e-commerce become additional elements which greatly affect PT XYZ in drawing up future business strategies in order to survive and win the competition.

Referring to the results of internal and external analyses conducted, strategic foresight made by PT XYZ focuses on three main issues, namely the development of ICT, the shifts in customer markets because of development of e-commerce business, and changes in the operating system associated with the quality of human resources and the availability of service networks. Those three issues are interlinked and influence each other against the business operation pattern of the company in the courier industry in the future. Furthermore, sharing economy or crowdsourcing is becoming one of the best alternatives to meet all the customer requirements efficiently and effectively, even though the implementation requires mature preparation, especially in terms of availability of ICT systems.

The action plan of PT XYZ has been arranged for a period of 5 years and focuses on issues that require the company to eliminate the gaps between existing condition and expected future by considering the results of strategic foresight. Development and strengthening of human resources, strengthening of ICT system, as well as development of new service networks in the cities that is integrated with web based, and real time online track & trace system are considered the main pillars of the action plan to be implemented by PT XYZ within five years.

Further research is required to determine the achievement indicators of strategic foresight PT XYZ that are measurable so that implementation of the strategies can run well. Besides, it requires further evaluation by PT XYZ on the financial impact arising in the implementation of the strategic action plan within the period specified.

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