

GIA NEWSLETTER

February 2004

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Global Intelligence Alliance

www.globalintelligence.com

Dear Reader,

This GIA Newsletter (GIA=Global Intelligence Alliance, a global network of competitive intelligence and business research firms) is a quarterly publication that will focus on the competitive intelligence and business information industry. Its intention is to provide timely and relevant updates about key events and issues related to this industry. Each GIA Newsletter issue will leverage the GIA's collective antennae to collect information about the intelligence industry from around the world. Readers are encouraged to submit topics of interest for future editions of the GIA Newsletter (hans.hedin@globalintelligence.com).

Warmest regards,

Hans Hedin

Coordinator – Global Intelligence Alliance

What's Up in CI?

Upside market researchers move higher up the food chain, more interpretive output is now in demand; information consulting is offered as side dish to research

- "Insight (i.e. information consulting) is not considered an insight unless it leads to action and growth."
- There is a need for development in new industry standards in market research.
- Information consultants will continue to service marketing-based initiatives rather than broader strategic ones deployed from the boardroom
- UK top 500 companies senior board directors survey: 44% had favourable impression of market research compared with 16% for management consulting.

Abstracted from Financial Times, December 2, 2003

Consolidation wave could swamp small market research agencies; there is room for quality and niche boutiques. Consolidation has been the main trend in the market research industry worldwide in the past decade, said Rocio Corrales, press officer with ESOMAR, the largest international organization for professional market researchers with 4,000 members in 100 countries. "The big ones have bought the middle-size agencies," she said. Now, 25 companies account for 65 percent of the market research turnover worldwide, or about \$17 billion a year, according to ESOMAR's Research World magazine. Abstracted from Prague Business Journal, November 24, 2003

In the Chinese Market, only a very limited number of companies have a systematic approach to CI. Why do less than 10% of Fortune 500 companies surveyed, and substantially fewer major Chinese firms, have formal CI programmes? The typical answer from firms operating in China is that they simply do not know how to get an appropriate system up and running. One of the biggest differences between conducting CI in China and other countries is the lack of credible published materials. In the US and Europe, consultancies have the luxury of typically relying on 80% desk research and 20% primary research or interviews. In China, that ratio is reversed, and usually over 80% of credible data comes from primary research. Focusing on CI in what is rapidly transforming into the world's most competitive market is a key competitive advantage. Abstracted from The Edge Singapore, November 10, 2003



BIRD'S EYE VIEW:

Globalization of Corporate Information Centers

Corporate information centers and intelligence functions are quickly moving toward increased global cooperation. Large companies are evaluating support units for potential savings, as the information centers in many companies are not structured to meet the needs of the organization with maximum efficiency and cooperation.

Compelling drivers for globalizing information centers

- Working in closer concert with other information centers can help mitigate the effects of reduced staffing levels.
- Forming new or broader buying consortia with other content deployment sites can save money for the organization.
- Redundant content purchases and information center tasks can be more easily identified with increased cooperation and networks / systems.
- The user community can be better served through continuity, standardization, pervasive branding / marketing, and ubiquity of information centers services.

Challenges

The most pervasive sticking points in the globalization process are

- lack of technology standards and access across the organization,
- widely varying user profiles across geographies,
- difficulties in team building among disparate information professional staff, and
- dealing with vendors who seem wedded to outdated licensing models.

Evidence shows that the needs and preferences of local users, as well as retaining local information sources, remain critical success factors. It's important that the voice of the local user doesn't get lost in the push to globalize.

Cultural differences

- Europeans are 15 percent more likely than Americans to use the Internet to seek their own information, and they also rely slightly more on their organization's intranet.
- Americans are 9 percent quicker to ask colleagues or experts and 12 percent more apt to use a personal collection of sources.
- 24 percent more Americans than Europeans say there isn't enough staff support for information tasks.

There may well be some leveling of these problems among geographic regions as globalization leads to more uniform source portfolios.

SUCCESSFUL GLOBALIZATION

Globalization of a large corporate information center is a huge project that is likely to take years. Therefore, the factors that drive this process must be highly compelling to key stakeholders. The new global structure will be most successful if it is built on a foundation of understanding needs at the local level.

Abstracted from Online Magazine, November 2003



Get to Know GIA Members

DeskResearch Nederland (www.deskresearch.com) is an independent market research company that has ample experience in finding and analyzing business information. The company delivers tailor-made market research and information brokerage services. Based in Amsterdam, DeskResearch Nederland works for an international clientele in a broad range of industries. DeskResearch Nederland joined the Global Intelligence Alliance in October 2003.

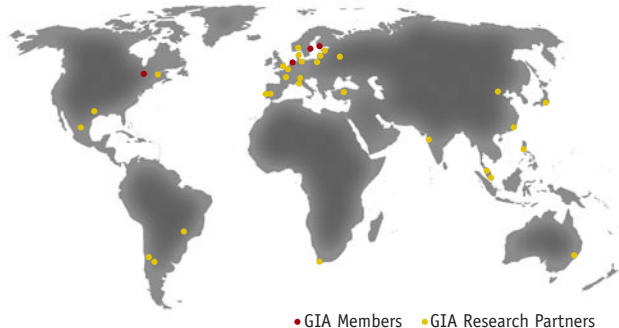
DeskResearch Nederland was founded in 1998 by Philippe Brandts. Before founding DeskResearch Nederland, Philippe worked for an international management consultancy. Other staff members include Anke de Bruine, Linda de Ree and Rogier Kuipers. In January the DeskResearch team will welcome a new colleague, Christa van Tol.

The DeskResearch Nederland team of professionals is looking forward to cooperating with other GIA Members and Research Partners in order to provide best-in-class solutions to the varying business information needs that global companies have.

About the GIA

The Global Intelligence Alliance (GIA) is a global network of business research and Competitive Intelligence (CI) consulting companies. Leveraging its worldwide reach, the Global Intelligence Alliance provides multinational organizations with a single source for all CI requirements including: process consulting, intelligence services, education, and leading technology solutions.

For further information or assistance in any Competitive Intelligence-related matters, please contact the GIA Member company closest to You, or refer to the GIA website at www.globalintelligence.com.



Meet the GIA at Upcoming CI events

American Export Business Intelligence 2004

February 12, 2004, Long Beach, California

SCIP '04 (Society of Competitive Intelligence Professionals)

March 22-25, 2004, Boston, MA, USA

Frost & Sullivan: Structuring Competitive Intelligence for Greater Bottom-Line Impact: 11th

Annual Executive Summit, East May 16-20 2004, East Coast Resort TBD, USA

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