

Journal of Competitive Intelligence and Management

Special Issue *on Country-Specific Competitive Intelligence*

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Journal of Competitive Intelligence and Management

The Journal of Competitive Intelligence and Management (JCI) is a quarterly, international, blind refereed journal edited under the auspices of the Society of Competitive Intelligence Professionals (SCIP). JCI is the premier voice of the Competitive Intelligence (CI) profession and the main venue for scholarly material covering all aspects of the CI and management field. Its primary aim is to further the development and professionalization of CI and to encourage greater understanding of the management of competition by publishing original, high quality, scholarly material in an easily readable format with an eye toward practical applications.

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Competitive Intelligence Through UK Eyes

Sheila Wright, Leicester Business School

Ahmad Badr, Leicester Business School

Arthur Weiss, AWARE

David Pickton, Leicester Business School

Executive Summary

Competitive Intelligence in the United Kingdom is steadily growing, yet the extent to which the country's practitioners either understand or appreciate the full extent to which CI can improve their strategic decision making and business performance is debatable. By the uninitiated, CI in the UK is, at best, mistaken for market research, and at worst, referred to as spying. In this article, the authors present the UK situation, which has been determined through empirical research with practitioners, industry specialists, and consultants. Training course attendance alone confirms that there are at least 16,500 interested managers in the country. A conservative estimate based on the notion that each manager who has received formal training in CI, has told at least one other member in their workplace would double that figure to 33,000. The overwhelming conclusion is that CI is not only present in the UK but it is a vibrant, creative, exciting, and growing community.

Key Words

competitive intelligence, competitive analysis, competition, competitive strategy, business strategy, United Kingdom, Society of Competitive Intelligence Professionals

About The Authors

Sheila Wright is a Principal Lecturer at Leicester Business School, De Montfort University where she leads the CI and Marketing Strategy (CIMS) teaching and research team. She holds an MBA from the University of Warwick, the Professional Diploma in Management from the Open University and was one of the first Chartered Institute of Marketing (CIM) members to be awarded Chartered Marketer status. She is an Editorial Board member and Regional Editor (Europe) for the *Journal of Competitive Intelligence & Management*.

Sheila has spoken at two SCIP European Conferences and has co-authored articles published in *Marketing*

Intelligence & Planning, European Journal of Marketing, R & D Management, Journal of Marketing and Comportamento Organizacional e Gestao. She is also author of the *Financial Times Marketing Casebook*, first edition, published by Pitman. In 2003, she was invited by the *Sunday Times* to speak on 'Competitive Intelligence for Business Development' for their Enterprise Network Conference Series which attracted 400 delegates.

Numerous research projects have been undertaken under her supervision, the most significant being Ahmad Badr's PhD thesis, the first successful Doctoral study in the UK concerning CI.

Sheila has been responsible for the setting up and development of CI units and is fully aware of the practical problems facing managers wishing to capitalize on CI. She has worked on many international projects in Turkey, Italy, Portugal, Belgium, France, South Africa, and the USA. Email: swmar@dmu.ac.uk

Ahmad Badr is a Lecturer and Researcher in CI & Marketing Strategy at Leicester Business School, De Montfort University and is also a member of the CIMS team. He holds a BSc from Beirut Arab University, Lebanon, and an MSc Strategic Marketing from Leicester Business School. Ahmad was awarded a Doctor of Philosophy degree by the University for his thesis on "The Role of CI in the Formulation of Marketing Strategy", the first successful Doctoral study in the UK to focus on CI.

He is the initiator of several research projects and is on the supervisory team of additional Doctoral studies. He is also the author of a comparative study of CI practice between US and UK firms. More recently, Ahmad was successful in the highly competitive Chartered Institute of Marketing Research Award Scheme, which secured funding for the CIMS team to carry out further studies into various aspects of CI, principally implementation and management.

With Sheila Wright and David Pickton, Ahmad is now developing his ideas, paradigms, and strategic frameworks which will assist managers wishing to incorporate CI into their strategic planning process.

Drawing on his industrial experience as a marketing manager for several international companies, Ahmad is able to illustrate the practicalities of implementing CI and Marketing Strategy plans.

Email: abamar@dmu.ac.uk

Arthur Weiss is a Competitive Intelligence Consultant and Managing Partner of the UK based CI consultancy, AWARE. He has lectured globally and published numerous articles on competitive intelligence and related topics in various publications and writes a regular column for the Society of Competitive Intelligence Professionals' *Competitive Intelligence* magazine. He wrote the marketing planning and competitive intelligence chapters and was General Editor for *Croner's Marketing - A Practical Management Guide*, published in 1996 by Croner Publications, London. He also teaches a course on Market Research and Information at Thames Valley University, holds an MBA (Distinction) from the University of Westminster, and is a Chartered Marketer with the UK Chartered Institute of Marketing. Email: a.weiss@marketing-intelligence.co.uk

David Pickton is Head of the Department of Marketing at Leicester Business School, De Montfort University. He is a Fellow of the Chartered Institute of Marketing, a Fellow of the Royal Society in Arts, and a member of the Academy of Marketing.

David has lecturing, consultancy and management experience in all areas of the marketing discipline. Recent publications have been in the areas of integrated marketing communications, strategic analysis, and competitive intelligence appearing in journals such as the *International Journal of Advertising, Strategic Change, Long Range Planning, Journal of Marketing Communications, Marketing Intelligence and Planning*, and *Croner's E-Commerce Briefing*. He has contributed to a number of academic texts and is co-author of a successful text on Integrated Marketing Communications published by Financial Times Prentice-Hall. He has acted as an ESRC research bid reviewer and is a member of the editorial board for the *Journal of Marketing Communications*. He has written articles on competitive intelligence with Sheila Wright and has supervised PhD research in a variety of aspects of marketing. He has co-edited two special issues of *Marketing Intelligence & Planning* and has recently been appointed Assistant Editor to the Journal.

Prior to entering an academic career, David worked for an international advertising agency and has many years of industrial and management experience covering both the public and private sector. He has been a Registered Marketing Consultant under the Department of Trade &

Industry Marketing Enterprise Scheme.
Email: dpmar@dmu.ac.uk

Introduction

The United Kingdom (UK) has been aware of, and actively involved in, the competitive intelligence (CI) profession since 1985. Four articles were published during 1984 in the UK journal, *Long Range Planning*, which drew attention to the phraseology: Farmer (1984), Jain (1984), McNamee (1984) & Reinhardt (1984). Until then, although work of a CI nature was being undertaken, it was not recognized as CI, was inaccurately labeled as market research and, for the most part was housed within the marketing department of a firm.

This paper reviews the situation since then until 2003, and presents a multi-faceted view of current practices. Empirical research provides the foundation for much of the findings although, by necessity, some of the opinions and views have been obtained by the authors from their network of professional colleagues. Wherever possible, these have been substantiated and investigated but it is inevitable that there may be omissions.

The authors also acknowledge the assistance of Andrew Pollard of EMP Intelligence Service in the preparation of this article, not only for helping us to get our facts straight, but particularly for his contribution to Section 1.3.

Section 1 - Background to CI in the UK

1.1- The Evolution of CI in the UK

Competitive intelligence as a distinct discipline in the UK is growing fast. Practitioners are hungry for knowledge, instruction, and guidance. They largely reject the importation of US focused gurus, consultants and academics who seem to have little understanding or empathy with the UK business environment and its laws. In short - fancy models and diagrams don't impress any more.

The Society of Competitive Intelligence Professionals (SCIP) based in Washington, USA, has hosted 18 Annual Conferences in the United States, and 8 in various European cities, only 2 of those being in London, 2000

and 2003. This is probably understandable, given that SCIP member numbers do not compare with the US, either within Europe generally, or the UK in particular (SCIP Membership Directory, 2003).

As such, there are a number of relevant providers of CI instruction, workshops and information with SCIP being just one part of the network. This does tend to cause existing and potential members to question the value of a not-insubstantial membership fee when almost all of the benefits are US centered. Whilst the number of alternatives to SCIP in the UK is increasing for the keen activists (see Section 2), SCIP still represents a conduit to international colleagues.

UK literature on competitive intelligence is limited with only 3 texts having been written by UK authors. Two of these, Pollard (1999) and Hussey & Jenster (1999) are titled *Competitor* rather than *Competitive Intelligence* and both are now over 4 years old. The third, West (2001) is titled *Competitive Intelligence*. Drawing attention to the age of all these texts should not be interpreted as a criticism of content. These works are still very relevant, but it does demonstrate the infrequency with which CI texts are written by UK authors. A fourth text was planned for 2001 by Gordon-Till. With a title of *Competitive Intelligence for UK Businesses*, it was eagerly awaited, but was cancelled and never published.

The lack of a UK perspective in book format required the examination of other sources. In 1988 a search of electronic and paper based journal archives revealed 489 relevant articles. By relevant, we mean those containing the key words "competitor intelligence" or "competitive intelligence", and appearing as scholarly articles in refereed journals. This was done to eliminate some of the more general articles on business, market intelligence, and strategy as well as those which were simply selling or reviewing software products. By concentrating on refereed journals, it was deemed that a commonality of standard and a degree of authority would pertain to those articles.

Wright & Pickton (1998a) first presented a chronological breakdown illustrating the increasing incidence of CI permeating managerial thinking in the UK since 1984. Four years later, this analysis was revisited (Wright, Pickton & Callow, 2002).

For the purposes of this review, the statistics have again been updated and the results are shown in Table 1.

Table 1: Chronological Analysis of Relevant CI Articles

Year	Number of Articles
2003	6 (first quarter)
2002	43 articles
2001	38 articles
2000	40 articles
1999	61 articles
1998	56 articles
1997	51 articles
1996	28 articles
1995	20 articles
1994	41 articles
1993	26 articles
1992	27 articles
1991	22 articles
1990	7 articles
1989	15 articles
1988	1 article
1987	1 article
1986	1 article
1985	1 article
1984	4 articles

There is no rational explanation as to why 1989 was apparently out of line with the previous 5 years, or why 1990 fell back again to just 7 articles. However, from 1991 onwards, CI has appeared on an increasing basis, year on year, in the academic and scholarly literature. The comprehensive bibliography produced by Dishman, Fleisher & Knip (2003) was also used to corroborate past analysis and verify the data.

To this must be added the contents of *Competitive Intelligence Review* (CIR), at the time, the only CI dedicated journal in the English speaking world. CIR, which ceased publication in 2002, had a major US bias. This is not by way of complaint, as the editorial team at CIR would, surely, have been only too pleased to publish more non-US based articles, if only non-US writers had submitted material. A total of 432 articles from CIR were reviewed. It was discovered that none of the relevant CIR articles concerned UK firms, and the concentration was heavily of American or Canadian origin.

Indeed there is little evidence in the literature to

Table 2: Number of CI Articles in UK Publications

Number (Year)	Publication Title
3 (2002)	<i>Marketing Intelligence & Planning</i>
1 (2001)	
1 (2000)	
1 (1999)	
1 (1998)	
1 (1997)	
1 (1996)	
1 (1995)	
2 (1994)	
1 (1989)	
1 (2001)	<i>Long Range Planning</i>
1 (2000)	
2 (1998)	
7 (1997)	
1 (1994)	
2 (1993)	
1 (1991)	
1 (1989)	
1 (1998)	<i>Strategic Change</i>
1 (2002)	<i>R & D Management</i>
2 (2001)	
1 (1998)	
1 (2002)	<i>European Journal of Marketing</i>
2 (2001)	
1 (1998)	

show that UK companies have acknowledged the very existence of competitive intelligence or have developed competitive intelligence units within their organizational structure, yet the UK membership of SCIP would suggest otherwise (see Section 2.1). It was found that a total of 38 articles had appeared in UK journals since 1989 and these are itemized in Table 2.

The sporadic nature of such appearances is notable with only *Marketing Intelligence & Planning* and *Long Range Planning* covering the topic with any frequency. Both *R&D Management* and *European Journal of Marketing*

Table 3: The UK Attitude towards Competitive Intelligence

Immune Attitude

- Too busy thinking about today to worry about tomorrow.
- Think that the firm is either so small, so big, or so special that it enjoys immunity from competitors and thus CI is a waste of time
- Minimal or no support from either top management or other departments.

Task Driven Attitude

- Finding answers to specific questions and extending what the firm knows about its competitors, usually on an ad-hoc basis
- Departments more excited about CI than top management which does not realize the benefits.

Operational Attitude

- A process, revolving around the company as its centre, trying to understand, analyze, and interpret markets.
- Top management usually trying to develop a positive attitude towards CI because they can see it might increase profit, and therefore personal bonuses.
- Unwilling or unable to think about the application of CI for the long term.

Strategic Attitude

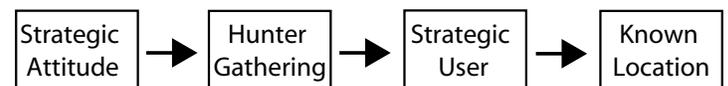
- An integrated procedure, in which competitors are determined as those who are satisfying our customer's needs, current and/or future
- Monitoring competitors' moves, anticipating what competitors will do next and working out response strategies
- CI receives top management support, co-operation from other departments and is recognized by all as essential for future success

have declared a relatively recent interest in CI, but nevertheless, have included 4 pieces each since 1998. This in itself is not significant, but as a percentage of the overall situation, these two newcomers to CI, represent 16% of the entire UK publication output in nearly 15 years.

The only sensible conclusion which can be drawn from the scholarly literature is that UK companies either do not wish to share their CI experiences or that they don't have anything to share. Alternatively, it could also confirm what we know through our professional colleagues and contemporaries, that CI is carried out under another name or that the term "competitive intelligence" does not mean much to UK firms.

It could be argued though that the very nature of CI encourages firms not to report on their activities and this is a view which the authors would support. Therefore, maybe UK firms are just as active, but are more guarded in letting their competitors know about it. This is in contrast to the conclusions of a unique study (Wright, Pickton & Callow, 2002) which developed a typology of CI in UK firms. The findings revealed that UK firms operated at many different levels with regard to the four strands of study: Attitude, Gathering, Use, and Location. The results for each of the strands are shown in Tables 3, 4, 5 and 6 in turn.

While appreciating that not all firms can immediately go from a cold start to the ideal situation (nor would it make sense to recommend this as universally ideal), the authors did, nevertheless, conclude with a structure for a utopian CI situation:



If the results of this survey are extrapolated, then it could be assumed that while UK companies are aware of the necessity of CI activities, they do not fully implement this into their organizational structure.

The first doctoral study ever to be undertaken in the UK on CI, was carried out by Badr (2003), using the Wright, Pickton & Callow (2002) study as a foundation. Badr concentrated on "The Role of CI in Formulating Marketing Strategy".

1.2 Government Support

The chasm between UK government and business is

Table 4: UK Intelligence Gathering Strategies

Easy Gathering

- Firms which use general publications and/or specific industry periodicals and think these constitute exhaustive information
- Unlikely to commit resources to obtain information which may be difficult or costly to obtain
- Always looking for an immediate return on investment

Hunter Gathering

- Firms knowing that Easy Gathering information is available to all who care to look
- Realize that if CI is to have a strategic impact then additional, sustained effort is required
- Resources are available which allow researchers to access sources within reasonable cost parameters, back their instinct, follow apparently irrelevant leads, spend time talking, brainstorming, and thinking about CI problems without always being pressured for "the answer"
- Firms which appreciate and support intellectual effort

wide. The involvement of government in UK CI is thus minimal. At a meeting with the Department of Trade & Industry on gathering information for competitive purposes, and with the aim of applying for grant funding, the opening quote from the state representative was "you do realize that it is my job to prevent you from getting any money don't you?". Needless to say, the project was not pursued.

Firms which operate in relatively controlled sectors such as water supply, electricity, telecommunications, gas, and other utilities, have to suffer regulators which make rules about mergers, acquisition, pricing, service provision, territory, and the like. Firms in these industries also have to respond, within fairly strict time lines, to

legally requested, detailed company information. This does, however, make the task of seeking company information somewhat easier than elsewhere where such requirements do not exist.

A notable exception is the support given to exporters and small businesses. The UK government actively encourages export activity via a series of booklets outlining information sources on target countries and provides country specialists to help exporters (HM Government, Department of Trade & Industry, 2003). Support is also given to small and entrepreneurial businesses via The British Chambers of Commerce organization (2003) and the Business Link (2003) network.

1.3 Historical Timeline

Competitive intelligence in the UK is not new, as evidenced by Nathan Rothschild's timely intelligence to make a fortune on the London Stock Exchange following the Battle of Waterloo in 1815. Among Rothschild's intelligence network was an agent who watched Napoleon's defeat at Waterloo, subsequently sent carrier pigeons to Rothschild, who the following morning sold large volumes of shares. Observers wrongly concluded that the French had won the battle, and shares slumped. Rothschild then bought back and awaited the news, which arrived conventionally that Wellington had won. The market correction helped Rothschild to his fortune (Ferguson, 1998)

This is but one of many anecdotal stories, largely unsubstantiated. Nevertheless, competitive intelligence as an identifiable business discipline within the UK is much more recent, although it is difficult to give a precise year. Table 7 sets out the significant dates.

The Open University (OU), commissioned the development of a module entitled P679: Managing in the Competitive Environment for its Diploma in Management in 1987. (Open University, 1987). The author of this module was Andrew Pollard, at the time a Lecturer with the OU. His innovative approach to education and teaching produced a module which was not only refreshing in its attitude, but also in terms of timeliness of content.

This module was the world's first program of CI instruction to be offered at post-graduate, management

Table 5: Use of CI by UK firms in the Formulation of Strategy

“Keeping up with the Joneses” User

- Firms trying to obtain answers to disparate questions with no organizational learning taking place
- Has commissioned a CI report from a consultant because that is what everybody else has done

“Knee Jerk” User

- Firms which obtain some CI data, fail to assess its quality or impact, yet act immediately
- Can often lead to wasted and inappropriate effort, sometimes with damaging results
- Such firms are most vulnerable to planted misinformation by competitors who are more CI aware

Tactical User

- Firms which use CI mostly to inform tactical measures such as price changes, promotional effort
- Some firms can successfully argue that CI loses its impact and timeliness if it gets stuck at the strategic level but are, nevertheless, acutely aware of its potential value to the business

Strategic User

- CI is used to identify opportunities/threats in the industry and to aid effective strategic decision making
- All levels of staff, both management and operational, are aware of critical success factors (CSFs) and their attendant CI requirements
- Continuous, legal measures are used to track competitors, simulate their strengths and weaknesses, build scenarios, and plan effective counter attacks
- Decision makers are involved in a high number of “what-if?” discussions to which CI data is applied
- Contingency planning and counterintelligence is a part of normal strategic thinking
- Action plans are implemented and mistakes are seized upon as learning rather than firing opportunities
- Open and facilitative management culture which displays trust and encourages involvement

level (EMP, 2003) and as such was eventually studied by over 10,000 managers enrolled on the Open University’s post-graduate programs (Pollard, 2003).

On leaving academia in 1988, Andrew Pollard founded the first dedicated CI consultancy in the UK (EMP, 2003). EMP Intelligence Service was a pioneer in the development of CI in the UK from the late 80’s onwards and its staff continues to develop new ideas. EMP concentrates on *how* CI can improve business performance rather than a simple re-working of old ideas and runs regular workshops which have a highly practical orientation. The EMP brand is well known in both the UK and Europe with its courses having been attended by over 6,500 practicing managers. Its inaugural workshop, “*Know Your Competitors*”, has been

running for 15 years.

Prior to the formation of EMP, competitive intelligence would have fallen under the category of marketing research or business information research, as evidenced by colleagues practicing during that time.

In 1989, a second organization of relevance to UK CI professionals was founded - the City Information Group (CiG) based in London. Although CiG was not aimed specifically at CI, its membership consisted of information specialists, researchers and analysts, many of who would embrace CI in their activity. City Information Group (2003) is closely linked to other information industry groups in the UK including those serving the business library and online information communities. Although CiG has hosted events relevant

Table 6: The Location for Intelligence Gathering in UK Firms

Ad-Hoc Location

- No dedicated CI unit within the organizational structure
- Intelligence activities, where undertaken, are done on an ad-hoc basis
- CI activity is subsumed into the marketing or sales department, with intermittent or non-existent sharing policies

Known Location

- Firms supporting a specific CI Unit, with staff working full-time on monitoring competitors and the competitive environment at the SBU or corporate level.
- Also involved in addressing particular issues specified by the Strategy Unit.
- Staff have easy access to decision makers and status is not a barrier to effective communication.

to CI, it has not sought an association with SCIP or the CI community as such.

The information industry, in general, and CI, in particular, has remained linked. Subsequently, the London Business School (1990), through its Information Service, organized a seminar entitled *Competitive Intelligence: Europe*, focusing on obtaining and using competitive information.

Probably the key feature of organized competitive intelligence within the UK was the founding of the UK Chapter of SCIP Europe in 1992. SCIP Europe started two years earlier, in 1990, as a sister society to SCIP in the USA but was steadfastly called the Society of *Competitor*, not *Competitive* Intelligence Professionals. This was not a semantic issue, as in the views of UK and European practitioners, *Competitor* Intelligence better described the work they were undertaking.

In 1992, a third organization of relevance was born, The Association for Global Strategic Information

Table 7: Timeline of Significant Events in the UK

Year	Event
1987	Open University: ' <i>Managing in the Competitive Environment</i> '
1988	EMP Intelligence Services formed
1989	City Information Group established
1990	London Business School Seminar: <i>Competitive Intelligence: Europe</i>
1990	Formation of SCIP Europe
1992	UK Chapter of SCIP Europe established
1992	The Association for Global Strategic Information (AGSI) founded
1996	SCIP Europe membership transferred to SCIP USA
1997	Online Conference Workshop: <i>Using the Internet as a Source for CI</i>
2000	SCIP Europe Conference, London
2003	SCIP Europe Conference, London
2003	Sunday Times Enterprise Network: <i>CI for Business Development</i>
2004	Vision in Business: Business Intelligence 2004

(AGSI), founded by Harry Collier of Infonortics. Its membership included Michael Belkine, Israel and from the US, Ruth Stanat and Ben Gilad, all of whom are now leading figures within SCIP. AGSI found membership recruitment difficult and ceased to operate after a valiant effort - which had included several conferences, and a well respected, high quality journal.

The On-Line Information Conference and Exhibition held annually in London, often includes speakers on CI issues (On-Line Exhibition, 2003). The 1997 conference included a full day workshop entitled "*Using the Internet as a Source for Competitive Intelligence*". Led by Arthur Weiss of AWARE (2003) and attended by 100 delegates, it is believed to be the first in-depth seminar covering the nascent use of the Internet for CI in Europe. Similar workshops covering both competitive and market intelligence were led by Amelia Kasse from the US, and took place during 1999 and 2001.

In 1996 SCIP Europe became a legal affiliate of SCIP and the two memberships combined. Since then, SCIP in the UK has essentially been an outpost of SCIP in the

US, apart from a short-lived period at the turn of the century, when SCIP opened up an office in London to promote and serve European membership.

Currently SCIP activity within the UK focuses on London, with the Thames Valley Chapter of SCIP which holds events every few months. The Northern Chapter which started a few years ago, now appears moribund, and is reported to have folded. The fifth (SCIP, 2000) and eighth (SCIP, 2003) Annual SCIP in Europe Conference took place in London and it is probably these types of event which will provide a vehicle for increased CI acceptance and membership within the UK.

Outside SCIP, the City Information Group continues to flourish with increased activity and interest while the Association of Independent Information Professionals (2003) expands its UK membership and is supporting CI through its highly regarded network of experts.

Various conference presentations have been made by the Competitive Intelligence and Marketing Strategy team at Leicester Business School, in an effort to promote the cause of, and report on, CI in the UK (Wright, McNidder & Pickton, 1997; Wright & Pickton, 1998b; Wright, 2001).

More recently, Sheila Wright of Leicester Business School was invited by the *Sunday Times*, a national newspaper, to be a guest speaker at their Business Development Conference series (Sunday Times Enterprise Network, 2003). Alongside senior representatives from Cisco Systems, BDO Stoy Hayward, and American Express, over 400 delegates were introduced to the concept of CI, business continuity, strategic alliances, and preparing a team for growth (Wright, 2003). This generated significant interest and 47 firms made further contact. To date, this has resulted in presentations to senior managers and board members of two large and four medium sized firms, marketing consultancy with a start-up technology business, business development consultancy for the trading arm of a major UK charity, joint projects with one of the country's leading management consultancy firms, an acquisition and CI consultancy study for a major international firm and job opportunities placed before students who had studied CI at Leicester Business School.

Although not entirely a CI Conference, the Online Information Conference and Exhibition (2003) again featured CI related topics with a "competitive

intelligence" trail highlighting exhibitors of relevance to CI professionals. Over 250 firms committed to the event, which attracts an international audience in excess of 11,000 visitors.

Similarly, a major Conference is being organized by Vision in Business (2004) in London. This is not necessarily advertised as a CI Conference but all of the 17 scheduled sessions are either titled as relating to CI, or contain a CI component.

To complete the circle, it is interesting to note that Sheila Wright was one of the first managers to benefit from Andrew Pollard's teaching on the P679 module when she was studying for the Open University's Diploma in Management.

1.4 The 'Founding Fathers' of CI in the UK

Liam Fahey is perhaps the only internationally regarded name in the CI community who originates from the British Isles. Fahey & Randall (1998) encouraged the community to consider how to learn from the future, and this was followed by *'Competitors'* a year later (Fahey, 1999).

There are a number of other practitioners who are widely known as CI experts. These include Andrew Pollard of EMP, Arthur Weiss of AWARE, and Chris West of Competitive Intelligence Services (CIS). Ann-Marie Lang, currently at Reuters, was made a fellow of SCIP at the 2003 annual conference and is highly regarded among her peers.

Other UK authors of repute have also written on areas of relevance to CI professionals. These include Brown & McDonald (1994), who focused on the types of strategy available to companies and used several UK case studies as illustrations.

In the corporate strategy arena, Gary Hamel is a pre-eminent UK based author. His highly regarded text (Hamel & Prahalad, 1994) became an international best-seller. At the time of publication, Hamel held the position of Professor of Strategic and International Management at London Business School. Other corporate strategists writing on competitive strategy include Hooley, Saunders & Piercy, (1998) on competitive positioning.

In terms of quantity and quality of empirical research into CI in the UK, one would look to the Competitive Intelligence & Marketing Strategy team (CIMS, 2003) at

Leicester Business School (see Section 2.4). In all other respects, there have been few new entrants of note in recent years.

1.5 Major UK Consultancies

There are currently only a few dedicated CI consultancies operating within the UK. These include EMP Intelligence Service founded in 1988, AWARE founded in 1995 and Fuld & Co. established in the UK in 2000. Alongside these organizations are: CIS and EMEA Consulting. The European Management Group offers CI as part of its portfolio of services.

Other organizations and companies based in the UK which support CI are: Derwent, now part of the Thomson organization, selling patent information, and Factiva, offering news information. Factiva is a joint-venture with Reuters in London and Dow-Jones in the US and is an essential service for secondary news sourcing.

1.6 CI Practitioners and the Uniformed Services

In some countries, CI practitioners hail from the uniformed services. This is not the case in the UK. The authors know of almost nobody in the UK CI community who has come out of the military or law-enforcement areas. That is not to say that they do not exist, it is just that they are not advertising their previous experience. The one known exception is Richard Withers, the Managing Director of the Fuld & Co. UK subsidiary. The tendency is for CI to grow from within marketing or information science departments. In the more covert areas, military and ex-police officers may be employed, but that is not a significantly visible activity. Unlike the US, past military service is not especially regarded as either desirable or valuable in the UK.

An examination of destination records at Leicester Business School (2003) revealed that of the 232 relevant Masters degree students graduating in the last 10 years, who had been taught CI on their Program, only 4 had entered military service and they were all reluctant recruits to the Greek or Turkish Armies to satisfy National Service requirements. None had any desire whatsoever to enter military service. It can therefore safely be assumed that the military is not an attractive

Table 8: Extract of Job Expectation of UK Retiring Police Officers

Constables

Chauffeur, Handyman, Coroner's Office, Salesman, Gardener, Loss Adjuster, Private Detective, Drugs Trainer

Sergeants

Victim Support, Golf Caddie, Barman, Police Trainer, Insurance Claims Investigator, Magistrates Court

Inspectors

Gaming Board Inspector, Legal Services, Accident Investigator, Benefits Investigator, Driving Examiner

Chief Inspectors

Safety Officer, Part Time Solicitor's Clerk, Catering, Taxi Driver, VSO, Victim Support, First Aid

Superintendents

Marketing Consultant, Risk/Crisis Management Advisor, Strategy/Management Consultant, Security Consultant

career option for business graduates.

The number of military strategists or intelligence officers in the UK is few. The Defence Intelligence Staff is the main provider of strategic decision intelligence to the UK with a staff of 4,500 both military and civilian. (HM Government, Ministry of Defence, 2003). On leaving the service, those who are attracted to the business and CI community, would be considered quite exceptional and would most likely be found at the Chief Executive Officer/Managing Director level.

Retired Police Officers have several options on retirement from the service (Off-Duty 2003), but the "areas likely to be of most interest" are private detective or driving instructor (Off-Duty 2003a).

Research carried out by the Home Office's Police Research Group revealed that of 100 officers approaching retirement, over 75% wanted to continue working, but only 4% had actually found work at the time the survey

Table 9: Comparative Analysis of SCIP Membership Retention 1998-2003

Location	Member Numbers 1998	Member Numbers and Names Retained into 2003
Aberdeen	1	0
Aberystwyth	1	0
Bedfordshire	1	0
Berkshire	7	0
Bristol	1	0
Buckinghamshire	3	0
Cambridgeshire	2	0
Dorset	1	0
Cheshire	14	John Harkin 1
Cleveland	1	0
Derbyshire	2	Jane Wisher 1
Edinburgh	4	0
Essex	4	0
Farnborough	1	0
Fyfe	1	0
Glasgow	1	0
Gloucestershire	3	0
Hampshire	3	David Brunnen 1
Hertfordshire	8	3 Constanza Galindo, Anne-Marie Lang, Rosie Litchfield
Humberside	2	0
Kent	2	0
Leicestershire	4	Sheila Wright 1
London	60	8 Roger Dawson, Olivia Freeman, Anita Goodzeit, Norman Jones, Robin Kirkby, Anthony Lynch John Pearson, Owen Wilson
Merseyside	1	0
Middlesex	8	2 Jonathan Gordon-Till, Arthur Weiss
Norfolk	1	0
Northamptonshire	3	2 Andrew Pollard, Nigel Whitmore
Oxfordshire	4	0
Surrey	11	Charles Stancomb 1
Sussex	3	Mark Hamson 1
Tayside	1	0
Warwickshire	1	Michael Young 1
Wiltshire	4	Dai Jones 1
Total	164	23

was conducted (Off-Duty, 2003b). The results are shown in Table 8.

It can be seen from Table 8 that the only grade likely to consider a post-service career in business would be from the Superintendent grade. Such individuals are not, to the best of our knowledge, active in the UK CI community. If they are then they are not openly talking of their law enforcement experience.

Organizations which employ retired police officers in the UK can be found in the insurance, retail, legal services, security, forensic science, debt management, recruitment, and education sectors. Some also work for the Ministry of Defence, local councils and organizations such as the Gaming Board for Great Britain (Off-Duty, 2003c)

Recruiters of CI practitioners in the UK normally expect a suitable candidate to hold a Bachelor's degree in business or a related academic subject. A Masters degree is increasingly a requirement, as is an industry based qualification or membership of a Chartered Institute (Pode, 2003). This also works against the recruitment of ex-uniformed service personnel, who have followed an entirely different career and educational pattern.

Section 2 - Current State of CI In the UK

2.1 Firms Engaged in CI

The SCIP Membership directory is perhaps not the perfect basis upon which to conclude the level of interest in CI in the UK, but it is a good start. Apart from anecdotal or informal knowledge of others involved in CI, the SCIP directory is probably the only official version of CI representation in the UK.

Since 1998, UK membership of SCIP has dropped from 164 to 130, representing a significant revenue shortfall (SCIP Membership Directory, 1998; 2003). While the UK is but a small section of SCIP's revenue stream, this situation represents a rather distressing customer retention rate of just over 14% and if that figure does not at least set off alarm bells in any business then it certainly ought to be an area for concern. The fall in membership also coincided with a 100% price increase for no apparent benefit to UK members (see Section 4.1).

Table 10: SCIP Membership Analysis by Industry Sector

Industry Sector	Number of SCIP Members 2003
Aerospace	2
Banking	2
Bio-sciences	3
Cars/ Automotive Products	4
Chemicals	2
Computing	5
Education	5
Electronics	4
FMCG	8
Healthcare	4
Heavy Engineering	3
Industrial Products	2
Information Services/BI/CI	26
Law/Government	3
Light Engineering	1
Management Consulting	21
Oil/Gas/Energy	8
Pharmaceuticals	10
Publishing	2
Telecommunications	8
Tobacco	2
Unknown	5
Total	130

A comparative analysis is shown in Table 9. Having been compiled in the US, locations have been taken from where the address line fell. For example, Parkstone Poole is shown separately, as a location when in fact it is a town in Dorset. A number of such inaccuracies have been adjusted and data amalgamated into recognizable English counties, and regions of Scotland and Wales.

Table 10 illustrates the areas in which UK SCIP members are working.

From dealings with colleagues, discussions with peers and conversations with CI providers, the authors are aware that not all CI activists in the UK are members of SCIP. Membership of similar organizations, subscriptions to CI focused newsletters, attendance at Conferences,

and the buoyancy of training courses and workshops suggested a re-assessment was required. Consequently an estimate of at least 60 times the numbers represented by the SCIP membership list is considered to be a more realistic estimate of CI practitioner numbers in the UK. As shown in Section 1.3, EMP Intelligence Service alone, has welcomed over 6,500 managers to its workshops (50 times SCIP UK member numbers), and EMP's figures are rising annually (EMP, 2003).

2.2 Growth of the CI Community

As stated above, CI in the UK is visible both through SCIP and the information industry organizations. The former is probably less active than the latter, where CI is not a priority, but just part of the overall activity.

A recent addition to UK activity has been the launch of a new CI magazine focusing on competitive and strategic intelligence within Europe. *Critical Eye* is a subscription-based magazine and website but it also offers networking benefits alongside subscriptions, and the publication organizes a number of breakfast meetings a year.

Overall, CI membership in the UK appears to reflect SCIP membership globally, having fallen by a third over the last few years. The danger is that any continued contraction could risk the viability of regular networking activity within the UK, further reducing the benefits of membership. This already appears to have happened with the Northern Chapter of SCIP in the UK being reported to have folded.

As mentioned in Section 1.3 above, this is not in line with reality. Over the past 18 years, Andrew Pollard has been responsible for training 16,500 managers in the skills of CI alone. This is an outstanding achievement for one person and is thus a reliable market size statistic for 2003. The market is still growing at a pace and has far greater potential than most external commentators acknowledge. It can also be fairly safely assumed that each one of those managers has shared their experience with at least one other in their firm, so instantly, the potential market doubles to 33,000 either practicing managers, or interested parties. This excludes the activities of all other CI specialist consultancies in the UK, firms offering training programs, management consultancies passing work out to market researchers or students studying CI at university.

Even using the 80/20 rule, if a professional support organization offered real benefits to UK practitioners, then 20% of those 33,000 people who have either learned about CI, or are interested in CI for improved business performance, would join - an instant membership list of 6,600 with the potential for it to grow with very little effort. However, such an organization would have to have professional standing (see Section 4.2).

2.3 Consultancy Growth

A number of recent developments suggest that the CI consultancy market is expanding, although there are no firm figures available to confirm this. Apart from Fuld's move into the UK in 2000 (described above), other notable new entrants include EMEA Consulting and FreshMinds.

EMEA Consulting (2003) is linked with the launch of *Critical Eye*. Although *Critical Eye* appears independent of EMEA Consulting and takes articles from authors working in other consultancies, the managing director of EMEA Consulting is also the editor of *Critical Eye*.

FreshMinds, takes a different and novel approach. Founded in 2000, the company has grown to over \$2m annual revenues, employing 18 people (FreshMinds, 2003). Winners of a 'Growing Business, Small Business' competition, the firm outsources most research to a team of top graduates, MBAs and PhDs.

Other consultancies also appear to have grown. Competitive Intelligence Services (CIS) is believed to have taken on a number of staff, and whereas a few years ago, only the founder, Chris West, would attend conferences, now other CIS staff are seen. CIS has also expanded outside the UK and established a US office (CIS, 2003).

2.4 Involvement of Universities

The only university undertaking empirical research of academic standard is the CIMS team at Leicester Business School. It was under the auspice of Sheila Wright and David Pickton that Ahmad Badr successfully completed the first and only Doctoral study in CI in the UK (Badr 2003). Dr Badr has now joined the CIMS team and with Pickton and Wright is developing the subject at post-graduate level.

Two further full-time MPhil/PhD students are now enrolled with the team, carrying out research into

the “Implementation of CI into the Organizational Structure” and the “Effect of CI on UK Banking Strategy”. Another student is in the application stage for part-time doctoral study into the “Potential for CI in Marketing Communication”. To this must be added an industry-funded study into “The Case for CI in Non-Profit Organizations”, and several MSc dissertation topics still under consideration.

In 2003, the CIMS team was awarded a research grant by the UK Chartered Institute of Marketing. The awarding panel used a triple blind refereeing process and concluded that just three of the potential six awards should be made. The results of the study, entitled, *The Role of CI in Implementing Marketing Strategy*, will be presented to the 2004 Academy of Marketing Conference. The other two awards were for general marketing studies and went to the University of Glamorgan and the British Broadcasting Corporation

Aside from this, the authors are aware of a PhD study being undertaken on Business Intelligence at the University of Loughborough although that is not yet complete. It will be submitted under the auspices of the Department of Information Science, not Business or Management.

The UK SCIP membership records identified members at the Universities of Strathclyde, Loughborough, Lancaster, Cranfield, and Henley Management College, as well as Leicester Business School. Otherwise, no central database exists to track such PhD theses other than through the information provided by individual universities on their own websites. On that basis we are as confident as we can be that Dr Badr’s thesis was indeed the first in the UK on CI.

Leicester Business School is also the only UK University to offer competitive intelligence as a dedicated module at any level which is taught, uniquely, by lecturers with practical experience. It is a core subject on the MSc Strategic Marketing degree and is a popular program of study.

The authors are aware that CI is included elsewhere by UK universities, but only at an elementary level, as a one or two week topic within a corporate strategy module. A module on *competitor* intelligence is taught at Loughborough University but as this appears within a library sciences program, its direction is more toward data sourcing than strategic analysis.

The lack of practical experience also hinders the development of CI within UK universities. It is not a subject that can be completely theorized, nor can it be taught from a book.

2.5 The Business Press

CI regularly appears in the business and trade press in one form or another but not necessarily with CI in the headline. When CI is reported in the trade press, the tone is generally positive. In contrast though, mention in the quality national press still tends to dwell on the espionage connotations associated with CI (Tillier, 1995; Faligot, 1996; Times, 1999). Infrequent articles have appeared in the *Financial Times* newspaper but genuine CI is rarely reported in the quality press.

2.6 CI Meetings and Conferences

Within SCIP there are two UK chapters. The London/Thames Valley Chapter holds a number of meetings annually, attracting between 20 and 40 attendees. The Northern chapter is smaller, and is reported to have closed down due to lack of interest. Competia has a London Circle, but this appears to have only ever held one meeting.

Apart from SCIP and Competia there are a number of organizations that include CI as part of their activities. Mostly these are commercial conference and training firms such as Vision in Business (2004). Such conferences are aimed at a wider geographic audience, although they are frequently held in London.

Another example would be the inclusion of a free session on competitive intelligence at the 2003 Online Information Exhibition and Conference. There are also several commercial training firms which offer CI but few of these trainers are active in, or members of, SCIP.

2.7 Significant Names

There are a number of individuals who are prominent within the CI community. However, in most cases, these individuals have not yet succeeded in expanding CI to new areas. Several UK authors have written relevant articles in the CI and trade press. It is difficult to single out any particular individual as having actively moved CI forward except within the narrow confines of the CI community. In this regard, consultants are excluded from consideration due to their vested interest in selling

services, but they have been given prominence elsewhere in this report.

The following people have made an above average contribution to CI within the UK: Anne-Marie Lang (SCIP Fellow); Robin Kirkby, London SCIP Chapter co-coordinator, Sheila Wright and the CIMS team at Leicester Business School, Jonathan Gordon-Till who links CI with the information communities, and Ian Turner of Henley Management College. Other names of note include Jane Attwood of BAE Systems who is listed as the Chapter coordinator for the London circle of Competia and Matthew Blagg and colleagues for their launch of the *Critical Eye* magazine.

Within the consultancy community both Arthur Weiss of AWARE and Andrew Pollard of EMP Intelligence Service spread CI through training. EMP offers regular publicly available workshops, and is the only organization in the UK which provides computer-based workshops for intelligence production. AWARE's training courses are predominantly in-house. Apart from these two, Chris West is also highly visible and links CI with the market research community. Gordon Donkin of the European Management Group has helped spread CI through his software services companies. Both West and Pollard have also helped spread CI through their books on the subject.

However, most CI is not carried out by CI consultants; it is carried out in businesses - good, bad or indifferent. Large consulting firms are often engaged and they subcontract to market research firms. They lack the strategic ability to integrate or use their findings so the whole process becomes one of data collection and reportage rather than a value-added activity, as described by Wright & Pickton (1998a).

Nevertheless, there are a handful of CI consultancies which show leadership. In alphabetical order they are:

- AWARE whose managing partner, Arthur Weiss, writes frequent articles in both the CI and non-CI press on CI related topics
- EMP through their training courses, articles and book on competitor intelligence written by EMP's director Andrew Pollard
- EMEA Consulting through their publication of *Critical Eye*

- CIS owing to the reputation and expertise of its founder Chris West
- Fuld & Co., as the UK subsidiary of the market leading CI firm based in the United States

Section 3 - How CI is organized in the UK

3.1 Unique Facets of UK CI

CI is typically located in the marketing department of a firm and thus is carried out by staff as an additional activity to another named job role (Badr 1998; Badr, 2003). This supports the previous comments regarding the employment of ex-uniformed services staff in the UK. It would be highly unusual to find an ex-military or ex-police officer which could satisfy the educational or business experience requirements to work in a commercially orientated CI role.

Work done by Mackenzie, Wright, Baron and Ball (2002) revealed the information sources of 47 practicing managers. The sample was revisited for the purposes of this review. In order to include those journals which were now identified as carrying CI relevant articles in the UK, (see Table 2), follow-up questions were asked to ascertain whether they had heard of, or seen a copy of, *R & D Management*, *Strategic Change* or *Long Range Planning*. The opportunity was also taken to include two SCIP publications: *Competitive Intelligence Review* (CIR), now ceased, and the *Journal of Competitive Intelligence & Management* (JCIM).

The updated results shown in Table 11, were entirely in line with the previous study. The one manager who responded in the affirmative, was the same respondent who had responded affirmatively in the original analysis. This individual is clearly one of very few managers who takes updating and information gathering seriously. Interestingly though, he had been a member of SCIP, which does explain why he was familiar with the publications, but he had in recent years not renewed his membership.

It could be argued that the wrong people were being asked this question with regard to CIR and JCIM, but experience and knowledge of the sector suggests that it is in the marketing discipline where CI activity, if

Table 11: Journal Awareness

Journal Title	Number of respondents who had either never heard of, or had heard of but not seen a copy (sample size = 47)
<i>Competitive Intelligence Review and/or Journal of Competitive Intelligence & Management</i>	46
<i>European Journal of Marketing</i>	38
<i>International Journal of Advertising</i>	46
<i>International Journal of Bank Marketing</i>	45
<i>International Journal of Retail Distribution and Management</i>	46
<i>International Marketing Review</i>	46
<i>Journal of Database Marketing</i>	46
<i>Journal of Marketing Management</i>	43
<i>Journal of Marketing Practice</i>	43
<i>Journal of the Market Research Society</i>	40
<i>Long Range Planning</i>	43
<i>Marketing Intelligence & Planning</i>	45
<i>R & D Management</i>	47
<i>Service Industries Journal</i>	46
<i>Strategic Change</i>	46

it is undertaken at all, is located in the UK. Despite being a sample of modest size, it was considered sufficiently diverse to give a meaningful assessment of how managers gain information on developments and current issues in their profession.

A somewhat unconventional approach to analysis was advocated by Wright & Pickton (1995) in their paper entitled "What Marketers Can Learn from Photography". Not to be confused with satellite imagery or photo interpretation, they suggested the employment of visual arts graduates with the expectation that they might be able to look more creatively at situations and think in a less formulaic or structured manner. In this respect, the UK is probably more willing to look at alternative ways of reaching a solution to a situation and is less likely to continually rely on management theories.

3.2 The Organization of CI in the UK

A survey of 178 UK organizations reported in Wright Pickton & Callow (2002), examined the ways in which CI active firms structure their efforts. These findings

were further corroborated by Badr (2003), with the resultant findings.

Most respondents with a dedicated CI unit believed it was essential to have one. Reasons included the need to have a centre of expertise to which information can be channeled, and the need for an unbiased, specialist skill set devoted to company-wide CI. However, 30% of those with CI units indicated that their company's performance had not really improved.

All respondents who were not part of a dedicated CI unit, indicated that their colleagues were aware of CI and that they showed an active interest and offered help if asked. For both the services and manufacturing sectors, the targeted CI practitioners were mainly based in marketing related departments and this had a major impact on the educational background of UK practitioners as previously discussed.

Analysis revealed that those firms with a dedicated CI unit could be found in firms with a turnover in excess of £10 million. 48% of the units had only one or two members and lack of resources represented only

12% of all major hurdles in establishing the unit. The other major hurdles highlighted constantly recurring themes such as the need for evidence of the benefits of CI (44%), problems of integration and acceptance by other departments/managers (41%) and location and responsibility issues (44%). Also, the lack of experience in CI and scarcity of UK models of CI in action caused 44% of respondents to have a problem of knowing what was expected from the unit.

Section 4 - Challenges for the Future

4.1 Challenges to the Growth of CI in the UK

Perhaps the single biggest barrier to CI being seen as a legitimate, recognized, and distinct profession within the UK is a misunderstanding, by those uneducated in the subject, of how CI can improve business performance. Although SCIP plays its part, the organization has not capitalized on UK interest and this is currently being satisfied by other organizations. Thus, CI is seen as a legitimate and important practice for businesses, but as part of a marketing or informational function rather than as a separate discipline in its own right. This is because most CI activists have grown into CI from the marketing and/or information science communities. Hence, CI professionals in the UK will describe themselves as business information professionals, or marketing intelligence professionals in preference to CI professionals, even if that is what they do.

If SCIP hopes to grow its membership in all Europe locations, then the US bias has to be diluted. A strategy, which recognizes differing countries, cultures, and practices, is required, but written and implemented by local experts, certainly not US academics or ex-MI5 officers.

An active program linking the information, knowledge management, and marketing communities is required. Essentially, if CI is to become a recognized profession within the UK, then its practitioners need to recognize themselves. It would also be beneficial to the growth of CI in the UK if SCIP were able to publish a plan of support outside the US. To date, the traffic is definitely one way. SCIP USA takes European membership fees,

but gives little in return. It is very difficult to persuade CI practitioners to belong to SCIP when the organization is so US-centric, dominated by consultants, and tangible benefits are minimal.

The activity in the UK which takes place under the SCIP banner is already open to non-members which further begs the question 'why should I pay?' For an intelligence-based professional body, SCIP seems remarkably inept at recognizing the problem.

Notwithstanding the number of businesses in Europe, the population, and the GDP, the UK, in particular, and Europe, in general, have buoyant economies (HM Government, Department of Trade & Industry, 2003). It is an area ripe for increased CI recognition.

The fact that SCIP is generally unknown in Europe is not a sign that CI does not take place, but that SCIP and the US approach is not acceptable. In this context, the merger and subsequent disappearance of SCIP Europe can be seen as a huge mistake. Europeans positively reject being treated simply as a revenue stream, nor do they appreciate being part of any organization where activities, prices, benefits, and policies are entirely US centered.

4.2 What Needs to Happen?

For CI to become recognized, it needs to follow the routes taken by other professional organizations. This includes greater emphasis within management and business education, especially within business schools. Ideally, there should be a career path and recognition for membership such as permitting the use of MSCIP (Member of the Society of Competitive Intelligence Professionals), but only if that status is earned. Without such a shift in attitude, SCIP will be seen as irrelevant and having little reputation as a professional body. Organizations in the UK, which allow the use of letters after the name when the holder has simply paid a members fee, are ridiculed.

The profession needs to look at equivalents, and equivalent member benefits, from the various UK competing professional bodies such as the Chartered Institute of Marketing, the Chartered Management Institute, the Chartered Institute of Management Accountants, and many more. Without exception, these organizations have grades for different levels of experience and their own Certificate, Advanced Certificate, and Diploma style of qualification programs

for membership. Chartered organizations also hold the Royal Warrant.

All similarly recognized professional bodies operate Continuing Professional Development (CPD) programs which are necessary in order to retain 'Chartered' status. Thus, the letters used after the name, actually mean something and have status.

As a starting point, SCIP should work alongside these organizations to encourage affiliate membership - perhaps offering discounts for joint membership, and initiating interest groups within the professional societies.

4.3 The Future of CI in the UK

Competitive intelligence is essential for individual business survival, and UK businesses recognize this reality. However, whether the CI profession is seen as a separate profession is more doubtful. Unless SCIP acts to raise the profile, the role will be seen as fairly low-level with the real power being in the hands of marketing intelligence professionals who would naturally affiliate with the Chartered Institute of Marketing or the Strategic Planning Society. In this context, it is important to separate people calling themselves CI professionals from the CI activity - the two are not synonymous.

Conclusion and Future Prospects

The role and acceptance of CI could probably be improved if the activity widened and received greater recognition. It is, after all, an incredibly attractive area to work in. Those graduates who have benefited from CI education in the UK have found employment in the field and are having a wonderful time. (Leicester Business School Destination Records, 2003)

If recognition is not forthcoming, then, at best, the CI community will stagnate and, at worst, it will fold. A vibrancy is needed to re-start organized activity. SCIP has not helped in this respect. As the only dedicated CI support organization in the world, it has failed spectacularly to recognize the needs, or the thirst for CI in the UK. New organizations are offering exciting rewards in terms of conferences, networks, information exchange, and discounted subscriptions to key publications and/or information sources.

The 2003 SCIP Conference in London was hailed as a great success, reporting attendance at 160 delegates from

across Europe, but this figure represents less than 2% of what we know to be practicing CI managers in the UK alone, not including Europe. It is impossible to analyze the attendance at this event because the delegate list, and proceedings have still to be published.

Key individuals are speaking on CI at many different occasions, attracting audiences of up to 400 in the UK alone, and thousands through workshop attendance. The time is ripe for a surge of support activities and recognition of CI as a key element for improved business performance. Empirical research has proven that a thirst for CI exists. Informal discussions with peers and colleagues active in CI, along with enthusiastic workshop attendance also underscore this promising reality. It is an explosion waiting to happen, if only something or somebody would light the fuse.

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