The intelligence industry towards 2015 is heading to more sophistication, integration to business processes, impact to decision making, and visibility. This GIA White Paper looks into the trends and anticipated developments of the industry to help companies develop their MI programs accordingly. The findings are based on an MI trends survey conducted by GIA among 146 executives and intelligence professionals globally during May 2010.

EXECUTIVE SUMMARY
Market Intelligence by the very definition is about looking into the future and providing actionable insights. However what does the future hold in store for Market Intelligence itself as a discipline and profession? The GIA survey provoked lots of commentary and insights around the anticipated future developments of corporate intelligence programs. The survey results and the related discussion in this White Paper have been built around the Key Success Factors of MI as presented in the GIA World Class MI Framework. Some of the highlights of the survey results have been summarized below.

Intelligence Scope
- Customers, end users and competitors as the change drivers towards 2015
- Emerging markets presenting the biggest opportunities and hence driving the intelligence efforts

Intelligence Process
- Intelligence co-creation
- Decision point intelligence (MI integrated to major business processes)
- Social media tools becoming part of the intelligence process

Intelligence Deliverables
- Increasingly sophisticated intelligence deliverables
- Increased degree of future orientation
- More emphasis on providing conclusions, provocative arguments and executive briefings on strategic topics
Intelligence Organization
- Centralization & decentralization trends in parallel; both representing progress
- Intelligence networks and expert teams (fixed and virtual teams)
- Outsourcing of non-core activities

Intelligence Tools
- RSS feeds to desktop, free news aggregation and video webcasts
- Mobile devices will be used increasingly as tools for sharing intelligence
- Graphical approaches and dashboards ensure a high degree of visualization

Intelligence Culture
- Executive commitment
- Demonstrating the value of MI on an everyday basis
- Internal branding of MI, training of users
- Social media paving the way for increased virtual collaboration
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1. INTRODUCTION

The purpose of the GIA MI Trends 2015 survey was to identify key trends and uncertainties that will influence the MI industry until 2015 and beyond in order to help companies develop their MI programs accordingly.

The survey was conducted in May 2010. 146 respondents, of whom 83% were intelligence professionals and 17% end users, replied to 19 questions related to the six key success factors of world class Market Intelligence: Scope, process, deliverables, tools, organization, and culture. The survey contained both closed and open ended questions.

Using the survey results

The reader may want to use this White Paper for collecting the relevant trends identified in the survey to the GIA World Class MI Framework and determining whether the trends suggest specific development efforts on one or several of the MI KSF’s in the reader’s own organization (Exhibit 1). The trends should provide ideas and perhaps confirm existing impressions about how to direct the intelligence resources, what tools to develop, how to organize the intelligence function, and what kinds of processes, deliverables and capabilities should be enhanced, going forward.

The intelligence development needs and the subsequent efforts are unique to each company and its business, organization and culture. The trends presented in this White Paper can therefore only suggest direction and next steps, but the exact timeline and linkage between development efforts with regards to different intelligence KSF’s are necessarily case-specific each time. Highlighting this is the staircase graph on the right hand side in Exhibit 1. Each step in the staircase is reached through a combination of intelligence development efforts that are a unique set for each company’s specific situation.

The readers are also encouraged to find case examples of how different companies have gone about taking their intelligence operations to advanced levels from the earlier GIA White Papers. However the emerging trends may shape the intelligence industry, there are fundamentals that stay, and the survey respondents, too frequently referred back to basics that may not be new as topics, but whose importance may be even growing when the corporate intelligence programs mature.
Definitions and Terminology
Market Intelligence (MI, frequently also used interchangeably with “Competitive Intelligence, CI” or “Business Intelligence, BI”) is a distinct discipline by which organizations systematically gather and process information about their external operating environment (such as customers, competition, trends, regulation, or geographic areas). The purpose of Market Intelligence is to facilitate accurate and confident decision making that is based on carefully analyzed information about the above mentioned topics.

2. MI SCOPE 2015

Intelligence Scope - Introduction
Defining the scope of the intelligence operation translates as listing out corporate functions that should be using intelligence deliverables, and topics and themes that each of them are most interested in. Additionally, the degree of future orientation needs to be determined; Looking into the rearview mirror is a good starting point, but a mature MI operation also needs to spend a lot of time on outlining possible future scenarios of the operating environment.
Trends 2015 - Survey Results
Not surprisingly, the survey results suggest the emerging growth markets such as China, Asia Pacific, Latin America, the Middle East and Eastern Europe are rapidly becoming part the geographic scope of most companies’ intelligence programs (Exhibit 3). The primary focus in these areas is gradually shifting from looking at investment opportunities and market entry strategies to continuously keeping the areas under the radar screen. Many Western companies already have an established presence in the growth markets, and they now need to stay on top of the local market dynamics both on an everyday basis and looking into the future. As a result, processing and translating local language business information will most likely consume more resources than before.

Which areas in the business environment will be under the heaviest change and therefore have the most significant impact on MI efforts?

Geographical perspective

![Anticipated changes in the regional scope of the intelligence program](image)

Exhibit 3. Anticipated changes in the regional scope of the intelligence program

From a value chain perspective, customers, end consumers and competitors will continue to be under the primary focus of the intelligence efforts for most surveyed companies; Customers and end users since they drive the business whether in the mature markets or emerging ones, and competition since it typically influences the pricing and differentiation strategies. Suppliers and distributors, in turn tend to be heavily under the radar screen in industries undergoing rapid changes in the value chain, i.e. M&A activity, partnerships and joint ventures on the supplier side, or for instance shifts in manufacturing technology or distribution strategies.
The scope of the intelligence efforts is initially determined by the MI needs analysis that should be repeatedly revisited even if the company is not expanding to new geographic areas, or the value chain that it belongs to remains stable. User groups to the intelligence program are also part of the scope of the activity, and the existing intelligence infrastructure can be leveraged to serve additional corporate functions and activities, of which Risk Management is an emerging example.

Risk management emerging as an application area of MI

With the Sarbanes-Oxley Act in force since 2002 and the more recent major failures in corporate risk management, it’s becoming increasingly important for especially public companies to comply with strict risk control measures both financially and qualitatively. From the MI perspective, this means that for instance sizable strategic investment decisions should be backed up with sound research and analysis, not only to ensure business success in the first place, but also to avoid the management being held liable afterwards for bad decisions made based on improper or missing information.

The implications of risk management becoming part of the application areas of MI in the organization are not exotic; Deliverables will need to be tailored accordingly, but the processes and methodologies rarely differ from other intelligence efforts. Market Intelligence can bring an external point of view to the risk management discussion that is typically internally focused: On top of internal business risks, management should consider risks originating from the customer base, competitive dynamics, macroeconomic factors, political environment, or technological shifts.
Intelligence Process - Introduction

“Intelligence process” refers to the process of gathering, analyzing and reporting information about specified topics to users. The intelligence process should always be anchored to the existing corporate processes (strategic planning, sales, marketing, product management, etc.) within which information will be used. In practice, the output delivered by the intelligence process should find its place as part of the strategic planning process, sales meetings, marketing reviews and innovation management, or as part of simply maintaining current awareness in the organization about the developments in the external operating environment.

Exhibit 5 illustrates the phases in the cyclical intelligence process: A needs analysis leads to information gathering from both secondary and primary sources, after which the information is converted into analyses and conclusions, followed by delivery, utilization and feedback. The concrete output of the process, is in turn illustrated on the right hand side of the graph, where decision making is backed up by intelligence products of different purpose, format and level of analysis depending on the user groups.

Trends 2015 - Survey Results

The survey results suggest that social media applications will be used increasingly for collecting
and sharing information for MI purposes. Three perspectives were specifically brought up in the survey:

- **Information collection and analysis around individuals.** By monitoring the activities in social media of some key people at customer, competitor, and supplier organizations, it will be possible to identify projects, new competence areas, travel plans, business relationships, and open positions that combined tell a lot about the company’s strategy and initiatives.

- **Internal use of features from social media applications.** Competitor and customer wikis will be created in order to enhance the internal knowledge about them. Blogs will be used in order to provide internal context and alternative perspectives to relevant business signals, and crowd forecasting will emerge as a parallel tool to traditional forecasting methods.

- **Cultural shift triggered by social media.** As people get used to both networking virtually and communicating on the go through smartphones and pocket computers, it should become easier to engage different parts of the organization in the daily intelligence efforts.

The survey results give strong support to co-creation as an emerging trend also in the corporate world, i.e. intelligence deliverables are created jointly by MI professionals and various decision-makers and stakeholders. In practice, MI professionals will need to increasingly often give briefings and presentations and engage in facilitating workshops such as scenario planning, war gaming, crowd forecasting, and trend seminars.

From the MI perspective, the co-creation trend means two things:

- Decision-makers, i.e. the end users of the intelligence deliverables will engage more tightly in the process of actually producing the insights. This is typically rewarding and motivating for intelligence professionals who in turn get to be involved in reaching the often strategic decisions that the company takes based on the intelligence efforts.

- However, to claim their position as the management’s trusted advisor and co-worker, intelligence professionals must truly understand the company’s business fundamentals and the management’s mindset, and to incorporate this understanding into their deliverables in an analytical and thought-provoking manner. In practice, co-creating intelligence deliverables with management does not mean less work for the intelligence professionals, but more.

The survey results in Exhibit 6 suggest that ideally in the future, the intelligence team needs to use their time on taking the intelligence deliverables to a high analytical level, after which it is time for the management to get involved and reach the final conclusions jointly with the intelligence team. Not surprisingly, the analysis process as a whole is not something that many companies would see being outsourced, or that management would be using much time on turning information into analyses. Outsourcing other parts of the intelligence process than analysis will, on the other hand be considered by many of the surveyed companies in the interest of liberating time from the in-house resources to concentrate on working close to the management and decision-making.
Standardization of the MI process throughout the organization
Typically in large organizations, intelligence efforts first emerge in regional units, without any significant central coordination that would ensure uniform research approaches, analysis methods or presentation templates. Many companies have realized, however, that building a solid world class intelligence program that is recognized company-wide requires an HQ-centric approach to ensure that the local units have a common platform to base their own efforts on. By at least partly standardizing the presentation templates, analysis frameworks, and sourcing of data, companies will achieve cost savings, avoid doing double work, facilitate cross-functional cooperation, and maximize the benefits of the intelligence program for the entire organization.

Decision-point intelligence
One of the frequently mentioned topics in the survey – and indeed in any MI-related discussions lately – is the integration of MI to decision-making and corporate business processes. Considering the popularity of the topic, it is surprising how few companies to date can honestly say that their decision-point intelligence is in a good shape, i.e. that all strategic decisions are being backed up with timely and well prepared analyses. Two conclusions can be drawn:

- Intelligence teams still need to work further on proactively understanding the business fundamentals and growth drivers of the company - and the related decision-making processes
- Decision-makers in turn need to understand that the intelligence teams will need continuous visibility not only to the concrete assignments that are requested from them, but to the decision points in the background from which the intelligence needs are derived
4. MI DELIVERABLES 2015

Intelligence Deliverables - Introduction
When considering the quality standards to be set for intelligence deliverables, it is helpful to think of the entire intelligence operation as an organization that produces marketable products to end users just like any company. Ad hoc deliverables are hard to produce, manage, sell, or measure systematically in any organization, and the same applies to the organization that produces intelligence deliverables.

The more sophisticated the intelligence deliverables are, the more they should aim at generating insight, since plain information will not be impactful enough to drive strategic and operative decisions. Insight, instead combines the newly created understanding with anticipated business implications, and has the power of pointing at directions to where the organization should be steered.

Exhibit 7. Typical intelligence deliverables

Trends 2015 - Survey Results
In general, MI deliverables will become increasingly sophisticated in the future. The survey results (Exhibit 8) suggest that MI products in the future will feature an increased analytical depth, online availability and still greater future-orientation. The sophistication of the intelligence deliverables ties in with the overall stage of development of the intelligence program, however; By combining experience with tools and resources it is possible to concentrate on increasingly analytical and future-oriented intelligence output, such as analytical deep-dives, scenario analysis, and war gaming workshops, while in the early stages there’s typically more emphasis on rather basic deliverables.
The survey respondents do not seem to put as much emphasis on the face to face delivery and discussion about the intelligence deliverables as on the technical qualities such as analytical depth and future orientation. This is somewhat surprising considering the earlier discussed trend of increased co-creation and interaction between decision-makers and intelligence professionals. The results can perhaps be interpreted from a timeline perspective: The need to develop the technical qualities of the deliverables is more immediate for many companies than the face to face delivery that only comes as the next step.

How will the MI deliverables develop with regards to the following aspects?

Analytical depth
Variety of deliverables
Future orientation
Online / just-in-time / frequently updated content instead of one-time reports
Face to face delivery and discussion of MI output

Exhibit 8. The anticipated development in MI deliverables towards 2015

The survey respondents do not seem to put as much emphasis on the face to face delivery and discussion about the intelligence deliverables as on the technical qualities such as analytical depth and future orientation. This is somewhat surprising considering the earlier discussed trend of increased co-creation and interaction between decision-makers and intelligence professionals. The results can perhaps be interpreted from a timeline perspective: The need to develop the technical qualities of the deliverables is more immediate for many companies than the face to face delivery that only comes as the next step.

How do you see the end user value of the following intelligence deliverables developing towards 2015?

Numbers, figures and hard facts about competitors’ or customers’ performance
Comparison and benchmarking between our and competitor products and services
Ideas, thoughts and opinions from experts about how the marketplace is changing
Discussions, comments, dialogue between people within our network
Broad trends and themes about consumer and household behavior
Macroeconomic indicators and forecasts to help understand business cycles
Industry-level indicators, price data, market size and market share data

Exhibit 9. Value of MI Deliverables
Additional trends and developments that were raised in the survey through the questions and open comments included:

- **Increasingly visualized intelligence deliverables**: Using graphs, dashboards and scorecards to visualize the analytical output of the MI process as opposed to delivering results in plain text and figures format. This trend again ties in with resourcing the intelligence function adequately: Producing insightful visuals requires time, highly analytical thinking and a solid understanding of the company’s business fundamentals.

- **Measuring the impact of the MI deliverables**: Related to the increased investment in the intelligence program, companies are becoming increasingly aware of the necessity of keeping track of the benefits. In the future, the survey respondents expected to see more of measures such as communicated success stories, direct feedback requests, and usage statistics of certain intelligence deliverables.

- **Adding the Early Warning & Opportunity perspective to existing MI deliverables**: Interpreting market signals and analyses from the perspective of both negative and positive risks for the company will increase the strategic value of the intelligence deliverables. The early warning and opportunity perspective will also provide a framework for assessing the relative importance of different developments in the operational environment of the company.

- **Personalized delivery**: While it is not meaningful for the intelligence team to even aim at personally delivering all intelligence output, much of the greatest strategic value is typically created not alone by either decision-makers or intelligence professionals, but in groups of both. Therefore as the intelligence deliverables develop towards increased sophistication, the survey respondents expect to see more and more of briefings, workshops, and informal discussions as the delivery format of strategic level intelligence output.

- **Decision-point intelligence**: Referring to the already discussed topic of the linkage between intelligence programs and business processes, we need to once again stress that decisions drive intelligence efforts. Therefore the intelligence deliverables will need to be built around the decision points that the intelligence input is needed for. This is not possible without an open dialogue and through needs analysis conducted jointly by the intelligence team and the decision-makers themselves.

## 5. INTELLIGENCE ORGANIZATION 2015

**Intelligence Organization - Introduction**

Organizing the resources for producing the intelligence deliverables calls for balancing between the external and internal intelligence networks: What should be purchased from which external sources (and what will be the budget), and who should be involved in producing the deliverables internally. Also, a decision has to be made about the degree of centralization vs. decentralization of the intelligence program; There are numerous examples of companies where the entire intelligence function is operated from the headquarters, whereas other companies do not have any HQ-level MI coordination at all. This naturally depends on the size of the company: Some companies may be so large that for instance regional units alone are sizable enough to have their own centrally coordinated intelligence programs, or the company’s business lines are so different that it justifies them having independent intelligence programs.
Based on the survey results (Exhibit 11), there's growth to be expected in MI investment following the initial impact of the economic downturn. However, it is good to remember that many companies did not downsize their intelligence programs in the first place, as there has been an urgent need for companies to quickly identify new business opportunities to fill in the revenue gaps generated by the recession. As for the split of resources, the survey results suggest that there’s a balance between hiring professionals in-house and outsourcing parts of the process.

**Trends 2015 - Survey Results**

Based on the survey results (Exhibit 11), there’s growth to be expected in MI investment following the initial impact of the economic downturn. However, it is good to remember that many companies did not downsize their intelligence programs in the first place, as there has been an urgent need for companies to quickly identify new business opportunities to fill in the revenue gaps generated by the recession. As for the split of resources, the survey results suggest that there’s a balance between hiring professionals in-house and outsourcing parts of the process.

**How do you anticipate the investment in MI resources to develop in your organization?**

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<th>Increase significantly (+2)</th>
<th>Increase moderately (+1)</th>
<th>Remain the same (0)</th>
<th>Decrease moderately (+2)</th>
<th>Decrease significantly (+2)</th>
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**Exhibit 11. Development of MI investment towards 2015**
Interestingly, many respondents expected the degree of centralization to increase in the intelligence organization (Exhibit 12), while at the same time the open comments suggested the opposite; i.e. that the level of decentralization would increase.

The polarization of the responses can perhaps be explained by the increasing maturity of the intelligence programs in many responding companies: On one hand, centrally coordinating, branding and facilitating the intelligence program gained a lot of support – not the least since this typically also means the program has top management’s strong support. On the other hand, as the intelligence program becomes increasingly embedded in the organization, local and unit-specific intelligence activities also become more systematic, which in turn speaks of decentralization of the intelligence program. As a conclusion, both the centralization and decentralization trends can simultaneously take the corporate intelligence program towards increased sophistication.

**Increasingly independent corporate level MI teams**
Some respondents to the survey indicated that towards 2015, MI units might be becoming more independent than before, being no longer organized under a specific function such as business development, marketing or strategic planning. This development will likely make the intelligence teams increasingly neutral stakeholders in the organization, enabling their independent support to different business processes, which should serve the entire company’s interests.

**Outsourcing of basic MI activities to increase, while the internal focus will be on high-impact deliverables**

The survey respondents expected to see outsourcing activities around the following activities:

- **Collecting information from external sources**
  Monitoring news, blogs, websites and analysis reports will typically be outsourced. Increasingly, companies are also looking to outsource the management of their entire information source portfolio in the interest of optimizing subscription costs.

- **Structuring information**
  While IT tools already provide some help in structuring the regular flow of information, much of the work still needs to be done manually, and companies expect this part, too, to be a potential outsourcing area in the future. Examples of outsourced deliverables may be company or industry profiles, regular sales leads reports, or monthly industry briefings.

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**What will best describe the development of the organizational structure of MI in your company over the next 5 years?**

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<td><img src="image" alt="Graph showing the expected dynamics" /></td>
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*Exhibit 12. Expected organizational dynamics of the intelligence program towards 2015*
• **IT tools for MI**
  Despite the initial interest of many companies to tweak existing corporate IT tools to also serve MI purposes, the survey results suggest many have realized that developing and maintaining such in-house tools is so resource-consuming that the company’s internal resources are best used elsewhere. Hence IT tools were viewed as one of the typical areas where outsourcing would be considered.

• **MI process set-up**
  Especially companies with little previous knowledge about the intelligence processes and tools typically consider using external help in setting up the intelligence program. With the increasing maturity of the profession, however, it is also typical for a company to hire an experienced MI executive from another company to build up the capability, once the mandate has been given by the management.

• **Additional viewpoints and methodologies from outside of the own company**
  Many of the respondents to the survey also saw value in engaging external consultants in the high level analytical work: These companies considered that outsourcing would bring in additional analytical viewpoints and specific methodological skills such as scenario planning or war gaming.
6. INTELLIGENCE TOOLS 2015

Intelligence Tools: Introduction

While the intelligence activity always relies on human processes rather than on technology, software tools are vital for the success of an intelligence program in that they greatly enhance the efficiency of storing and delivering the intelligence that is being produced. Software tools are also something tangible, which make them a great marketing tool for the intelligence deliverables and the entire intelligence program.

Software tools are also essential for the continuity of the intelligence activity at times when either the producers or users of intelligence change. In addition, software tools facilitate two-way flow of information by encouraging the user base to not only use intelligence but to produce content as well.

An intelligence software tool should provide a single user interface to filtered intelligence content from internal and external sources. A technology tool specifically designed to support intelligence processes is typically linked with the organization’s intranet and hosted either in the company’s own IT infrastructure or by an external service provider.
Trends 2015 - Survey Results

The top four trends that surfaced from the survey results regarding the respondents’ preferences of receiving information in the future were:

- RSS feeds to individual desktop
- Information feeds from Google or other free information sources to the desktop
- Using smartphones for MI purposes
- Using video materials (through e.g., YouTube) for MI purposes

At the same time, delivering information in paper format or through radio and television was expected to further decrease in volume.

How do you expect your own preferences to develop over the next 5 years regarding receiving business information?

Exhibit 14. Development of MI-related IT tools

- Increase significantly (+2)
- Increase moderately (+1)
- Remain the same (0)
- Decrease moderately (+2)
- Decrease significantly (+2)
The survey also looked into the technologies that the respondents expected to be in MI use in the future (Exhibit 15), with the result that in addition to smartphones, crowd forecasting tools, Microsoft SharePoint and social media platforms will shape the way intelligence is being produced and communicated.

Several tools and technologies also provoked commentary in the survey:

- **Collaborative tools: Wikis, blogs and crowd forecasting**
  The internal use of wikis around for instance competitors, customers or key markets will increase towards 2015. The technology of course only provides the platform, however with people growing increasingly used to being part of virtual communities, the survey respondents expected the internal wikis to be adopted rather rapidly. Crowd forecasting tools are also emerging rapidly, as people have started to see their value in quickly facilitating the co-creation of insights on relevant business topics. Finally, blogs are not a new phenomenon, but their use for MI purposes is still in its infancy. The potential future impact of blogs is huge as people in general tend to be more interested in provocative viewpoints and opinions than plain newspieces and neutral business analyses.

- **Artificial intelligence and desktop text mining tools**
  While the technical tools to aid automated analysis have been under discussion for long already, there are few signs yet of any tangible developments in the area. The interest is there, however, especially as the intelligence teams are looking forward to drive their own work towards drawing analytical conclusions and discussing them with management rather than spending time on the early phases of analyzing data.

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**Exhibit 15. Technologies that will have an impact on MI activities**
• Geographical Information Systems (GIS) tools for providing geo-demographical and competitor data

The GIS applications to provide geo-demographic data about customers (and competitors) have gained ground rapidly over the last few years, and their value as an MI tool has subsequently increased. Further growth was expected in the survey results as well.

• Integration of different technical tools

With most companies already looking at several separate systems that all cater to intelligence needs (CRM systems, MI/CI software, intranets, social media platforms, etc), increasingly many are also seeing the necessity to integrate these tools, at the very least by arranging for a single point access to all systems.

7. INTELLIGENCE CULTURE 2015

Intelligence Culture: Introduction

Intelligence culture is essentially the glue that keeps the entire intelligence operation together, and by the very definition of culture, it is born and nurtured inside the organization. Perhaps the most important element in gradually generating an intelligence culture in any organization is senior management’s articulated support to the activity. Other important building blocks are demonstrated benefits of the activity as well as successful internal training and marketing efforts. These together typically take the organization from first being merely aware of the intelligence program through accepting it and recognizing its value to finally assisting the intelligence team in co-creating the insights that the company needs in order to stay competitive in the marketplace.

Exhibit 16. The elements and evolution of a corporate intelligence culture
Trends 2015 - Survey Results

The importance of executive commitment and active internal marketing of the intelligence program were also reflected in the survey results, suggesting that the above will continue to be the key success drivers for the intelligence program also in the future.

An intelligence culture, like culture in general, is much about social cohesion, common beliefs and common behavior. The fundamentals such as management’s support and marketing efforts will continue to drive the intelligence culture, but an interesting addition will be brought by not the social media tools themselves, but by people growing familiar with exposing their thoughts and views to large virtual audiences. The survey results indicate that this trend might bring significant changes to the cultural side of corporate intelligence activities, going forward.
8. SCENARIOS FOR MI TOWARDS 2015

In the GIA Conference 2010 organized in Helsinki, Finland in June 2010, a one-day scenario workshop was conducted on the topic of “MI Scenarios towards 2015”. The workshop involved intelligence practitioners from several countries and companies, and the idea was to come up with alternative development paths that the intelligence industry may follow over the next few years.

From a range of uncertainties identified in the GIA Trend 2015 survey, two were selected for the workshop purposes: The internal users of MI in a company, and the future availability of public information sources that are currently in use.

Three scenarios were constructed based on the uncertainties. One expected MI to serve the entire organization in the future (this scenario was named Collaboration). The second one assumed top management would be the primary internal user group of MI (this scenario was named Consulting). Both of these scenarios assumed relatively unrestricted availability of public information, either fee-based or free of charge.

In the third scenario, named the Dark Ages, there is limited supply of information available from public sources owing to several reasons. In this scenario, the working environment for MI would differ radically from the two other scenarios.

Most if not all of the trends presented earlier in this paper support scenarios 1 and 2, with the unrestricted availability of information. Therefore, it is interesting to look at scenario 3 more closely as the “improbable yet impactful” alternative.
What limited access to information would mean in practice:

- News media setting up pay walls for accessing news
- Social media content not widely shared (company policies, privacy concerns)
- Companies have adopted a stricter policy with regards to distributing information about themselves, both internally and externally
- Information providers implement stricter rules for using their products
- Regulators launch stricter rules about collecting, publishing and distributing people or company-specific information, or both
- Information warfare: Internet under frequent attacks by terrorists to disrupt usage

Impact and implications

- Need to look for and rely on informal sources
- Need to spend more time on verifying data
- Need to construct analyses from very small bits and pieces
- Illegal information sources/providers might emerge
- More time and resources will be required
- New skills demanded from MI specialists
- Scope of MI needs to be narrow and prioritized
- Tools for automated information collection and processing are not developing

Scenario 3, should it materialize, will be a tough challenge to handle. It will practically mean that the MI organization needs to rely on internal sources of information to a much greater extent than before. Primary information collection would also dominate the information collection process, significantly increasing the costs of the intelligence program.

For the time being, MI developers mainly focus on scenarios 1 and 2, and do so for solid reasons. However, it is good to be aware of scenario 3 in order to keep the radar out for any early warning signals about this scenario becoming reality, however improbable it may seem now.
For more information, please visit www.globalintelligence.com or contact the GIA representative closest to you:

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