

Australian CI Practices: A Comparison with the US

Babette Bensoussan

Managing Director, The MindShifts Group Pty Ltd., Sydney, Australia

Edward Densham

Sydney Graduate School of Management, Australia

EXECUTIVE SUMMARY

Is there a difference between the practice of competitive intelligence in Australia with its practice in the US? While globalization is shrinking the barriers of distance, environmental differences in the two business arenas exist in the form of competition pressure, national and corporate culture, government and legal policies, and market alliances. Although the discipline may have originated as a formal and structured function in the U.S. back in the 1980s, it would appear that organizations in Australia have been slower to accept the value and benefits of a formalized approach to information gathering and analysis. Examples of best practice are often large U.S. companies with the resources to support the function. In some areas of the Australian business community, there exists dissatisfaction with sub par Australian competitive intelligence - a function of the 'quick fix' mentality that encourages 'bolting CI on' to existing functional structures. Australia also lacks a competitive intelligence training ground. There are few MBA graduates working in the field, few business schools teaching the practice, only

two consultancy firms dedicated to competitive intelligence in existence and the SCIPAust membership is small. The relative size, available resources, and level of national awareness have led to competitive intelligence being less formalized and structured in Australia when compared to the U.S.

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ABOUT THE AUTHORS

Babette Bensoussan is a Director of The Mindshifts Group, Sydney, Australia, a company specializing in competitive intelligence, strategic planning and strategic marketing projects in the Australasian region. She has undertaken major studies and consulted to Australian and global *Fortune 500* companies in strategic business and market planning, competitive intel-

ligence, and strategic analysis. Babette is a Founder of the Society of Competitive Intelligence Professionals in Australia (SCIPAust) and was awarded a Fellow of SCIP in the USA in 1996. She is an Adjunct Lecturer at the Sydney Graduate School of Management, University of Western Sydney, in Competitive Intelligence. She has published numerous articles on strategic planning, competitive intelligence, and strategic marketing and is an invited speaker and guest lecturer both domestically and internationally. She is the co-author of the best selling CI book - *Strategic and Competitive Analysis – Methods and Techniques for Analyzing Business Competition* (Prentice Hall, 2002).

Email: babette@mindshifts.com.au

Edward Densham is currently a full time student at the Sydney Graduate School of Management. Previously he was the Sudan Country Director for the international relief and development organization Samaritan's Purse. He has a background in implementing medical, public health, agricultural, educational and demobilized child soldier programs in conflict areas. He earned a BSc Hons. at Loughborough University, U.K., in the field of sport science and recreation management followed by a postgraduate certificate in secondary education focusing on physical education and science. Currently living in Sydney, he is married with one child.

Email: atibadensham@bigpond.com

Introduction

"Know your enemy and know yourself, and in one hundred battles you will not be defeated. . .much calculating, estimating, analyzing, and positioning brings triumph. . .little computation brings defeat . . .know the battlefield."

Sun Tzu in
The Art of War

It would not be surprising if most CEOs and Managing Directors both in Australia and the U.S. had not only heard of the Chinese war lord, Sun Tzu, but are able to quote some of the popular phrases. Books comparing Judo, chess, warfare, the CIA and even insects to business decisions and strategy can be seen poking out of golf bags and from the briefcases of business

leaders testifying to the value of being perceived as a strategist in the corporate environment. Yet, despite its revered position, the practical application of strategic concepts seems similar to that of driving and listening. Everyone thinks they do it well.

Competitive intelligence is all about 'managing the entire competitive battlefield' (Bensoussan, 2003). You need to know your organization, the competition, and the battlefield, and then be able to analyze and use this information in the decision-making process. The purpose of this paper is to look at how the practice of this process differs in Australian companies from those in the U.S. We will see that inherent differences in culture, the environment, management style, and best practice will all have an impact. However, it will also be evident that, as is the case with most of history, lessons from previous incidences are known about but often not acted on.

Competitive intelligence began to take shape as a formalized business discipline in the U.S. during the eighties. In Australia, it was not until 1990 that one lone voice rang out for CI - Vernon Prior of Kirk Tyson Inc. in Melbourne, Australia. One year later in 1991, Vernon Prior, Chris Hall, Bob Cain and Babette Bensoussan started SCIP in Australia (SCIPAust) with a total of four active members. Individual Australian managers and companies were practicing some of the ideas and concepts throughout the eighties and nineties but it was, as with other parts of the world, focused on competitor intelligence and not competitive intelligence.

In order to look at how competitive intelligence is and is not practiced, we need to understand why it is necessary in the first place. Much CI practice, whether formalized or informal, comes down to the presence and intensity of competition. Competitive intensity in the environment has increased as a result of technological developments, globalization, product availability and variety, distribution improvements, the Internet, and consumer sophistication.

In 1989 Korn/Ferry International and the Columbia University Graduate School of Business conducted a survey of business practice. (Korn/Ferry International and Columbia University Graduate School of Business, 1989). They found that the majority of companies in the US did not consider foreign companies to pose much of a threat in the 21st century. In 1991, Jan Herring noted

that such attitudes on the part of US management have relegated competitive intelligence or, as some preferred to call it then, business intelligence, to a low priority in US companies. He goes on to point out that while, at the time, 67% of companies planned to increase their efforts, only 3% actually had fully developed competitive intelligence systems (Herring, 1991).

Why did companies in the US fail to recognize the value that would be added by the implementation of competitive intelligence into their organizations? It would appear that they failed to recognize the threat posed by unseen competitors and how the environment was changing. Their confidence in their ability to make appropriate strategic decisions combined with complacency towards the competition had catastrophic consequences in many US industries during the early 90s.

For Australia, during this time, its distance from international markets and its small population protected it to some extent from the vagaries of intense competition; hence, a key driver for taking up any competitive intelligence system and/or process was mainly lacking.

Herring (1991) suggests four reasons why companies in the US did not heed the suggestions emerging from the developers of competitive intelligence to their peril:

1. The competition was not severe enough, and senior managers believed they knew the competitors
2. Senior managers believed that they already had the capability
3. They could not justify the costs
4. Ignorance of competitive intelligence

It is very interesting to note that these same reasons are apparent in Australia today. We are in the information age, books abound, professional journals exist in every discipline, and yet the cyclical characteristic of history seems to be repeating itself again. The only difference seems to be that Australian executives are taking longer to learn the lesson that competitive intelligence is not an optional extra - it is a core competency for the organization.

CI in Australia

As mentioned previously, the first gathering of CI

enthusiasts in Australia was in 1991 and the idea and discipline spread predominantly by word of mouth and networks. Ten years later, SCIPAust had over 136 active members, numerous interested parties on the periphery such as the Australian Librarian and Information Association (ALIA) and the Australian Institute of Professional Intelligence Officers (AIPIO), and held regular meetings, workshops and a conference on the topic every year.

Another management trend during this time, knowledge management (KM), was accepted more readily. As Australian managers and KM thought leaders moved down the KM path, some interest in CI grew as the need for understanding how to get everyone to contribute and add value to the competitiveness of the organization became a critical component in the overall effectiveness of KM.

Growth of the discipline itself by management in Australia was, however, still slow. The predominant users of CI in Australia were and still are the subsidiaries of large US multinationals who generally have a CI team at head office such as the pharmaceutical and IT companies. Whilst the teams in Australia are still small - often one person or part of someone's other job - providers of CI sought training, attended conferences, and workshops on the topic. They too, however, came up with a general lack of CI understanding at the most senior levels of the organization locally.

In 1996, Chris Hall and Babette Bensoussan conducted the first survey into the state of competitive intelligence in Australia. The study found that although 93% of firms claimed they were in competitive markets, and 83% saw the level of competition increasing in the next five years, most were not making the best use of the available techniques to monitor their environment, competitors and their own competitive position. Even though 60% used strategic plans on a regular or continuous basis, only about half that number used intelligence techniques (competitor audits, benchmarks etc) necessary to monitor their competitiveness effectively, and only 22% had any plans in place to improve their CI.

The methods used by a representative cross-section of Australian firms indicated a relatively unsophisticated approach to CI; typically managers would talk to a few people, read the papers, and keep their ears open for

rumors. It was not necessary to do much more to keep tabs on competitors. The manager, probably quite rightly, saw that he or she was the best person to have central responsibility for CI.

On the other hand, those that did use some CI techniques (30% of respondents) tended to rely on rather unsophisticated and unsystematic techniques. This relative lack of overall sophistication in CI approaches meant that it was not necessary to have CI professionals.

There was, as previously mentioned, a general recognition amongst CEOs and other managers that competitive pressures would increase in the future, and that more effective and integrated CI would be needed. CEOs and senior managers believed that they would remain central to this process, but there was widespread recognition that CI and strategy would need to be more closely integrated, and that to be effective, CI needed to be diffused more through the organization.

The survey then went on to ask what they thought would be most helpful to their organization to improve its ability to keep track of what competitors were doing and of their own competitiveness - the most important factors nominated, by just over 50% of respondents, were:

- the training of staff to gather competitive intelligence
- the use of competitor analysis and audits
- the integration of CI and strategy

"What is encouraging, though, is that about 50% of managers see the need to better integrate CI and strategy...this suggests that the unsophisticated and unsystematic approaches to CI will become less common in future," (Bensoussan & Hall, 1996). So while there was some certainty that, with increasing competition, the level of sophistication of CI would increase in the future, the key question was when and how this growth would occur.

Since 1996, there has been limited Australian CI research. One promising sign is that Hall and Bensoussan will be repeating the 1996 study in 2004-05 to measure changes in corporate Australia towards CI. A decade plus after its origins, there are still few experts in the competitive intelligence field in Australia. In a

presentation to SCIP Aust in 2000, Chris Hall noted that he found the use of competitive analysis tools by Australian firms was well below the benchmark in every area (Hall, 2000).

While it is understandable that there is a time lag between an idea's institutionalization in another country, more may be involved in the acceptance of new ideas than is at first apparent.

Firstly, The Society for Competitive Intelligence Professionals, based in the U.S. has 7,000 members while today only 125 of SCIP Aust's members could be classed as active. 84% of these members see themselves as practitioners of CI and this does represent an increase of 43% since 2001. SCIP Aust holds quarterly meetings for members and a full day conference every couple of years. There has been a growth in CI dedicated conferences being generated by the independent conference organizers such as Marcus Evans and Institute for International Research (IIR) over the years with one major CI conference per year in Australia. CI is also seen as a topic in a number of other conferences whose themes range from Knowledge Management to Strategic Planning to Market Research.

Secondly, the *Competitive Intelligence Review* and the *Competitive Intelligence Magazine*, both are published out of the U.S., the majority of conferences and seminars take place in the U.S., and information on best practices usually uses U.S. examples. There are no publications dedicated to CI in Australia nor is it easy to come across Australian best practice examples that are comparable to the U.S. There are very few authors and writers on this subject in Australia.

Thirdly, teaching of competitive intelligence in Australian business schools is rare, with CI journals non-existent in their library's databases and shelves. Of all the universities in Australia, Macquarie Graduate School of Management and the Sydney Graduate School of Management offer the only elective dedicated to the discipline of CI in an MBA program. Bond University and the University of South Australia teach it as an undergraduate subject in their Bachelor degrees and other universities - University of Technology, Sydney and Royal Melbourne Institute of Technology teach CI as part of other subjects.

Fourthly, the number of consultancies dedicated to CI is still small (about two to three) although numerous management and market research consultancies do

now claim CI as part of their repertoire. Interestingly, a scan of published materials and their web-pages suggest that most of these consultancies are unaware of SCIP or SCIPAust.

Australia versus USA

Why is competitive intelligence not as widely practiced in Australia as the U.S. despite its obvious value adding capabilities? What are the factors that influence this difference?

Gilad narrows it down to time, money, size, environment and culture (Gilad, 2003). "The U.S. is aggressive, competitive, and values individual excellence and success, and business education/ analytics is developed more than anywhere else in the world (note number of MBAs), so CI has been accepted there earlier than anywhere else" (Gilad, 2003).

The environment is a vital factor in the way in which an organism develops and survives. Environmental differences in the two countries will directly impact the acceptance and growth of competitive intelligence within them.

The business environment in the U.S. has the highest degree of competitive pressure of anywhere in the globe. The affluence and maturity of its consumers makes it an attractive market to both internal and foreign companies. There is a high degree of competition where many substitutes abound. Distribution networks have access to large volume of sophisticated buyers armed with the knowledge that in their environment, the customer is king. The power of the consumer's position of 'always being right' is evidence of the desperation attached to the desire to keep customers from going elsewhere. Free trade is proclaimed, although not always practiced, with a great deal of pride attached to capitalist tendencies.

This highly competitive environment led to the development of philosophies in the U.S. to provide ways of succeeding in this environment. Porter emphasized product differentiation, cost leadership, and focus as well as advocating and developing models to assess competitive advantage through understanding the marketplace. Drucker distinguished between effectiveness and efficiency aiding organizations to make the main thing the main thing. Peters encouraged a drive towards excellence as a means of winning. Kotler developed a structure with which to understand both

the market place and the forces driving it. It became increasingly evident that it was necessary to do more than produce a product to be successful in this highly competitive environment.

The Australian environment is different from the U.S. While this statement seems obvious, it is an important one whose relevance is not always realized. Australia has traditionally been isolated by distance. This isolation has had two effects on competition in Australia.

Firstly, the distance combined with the relatively small and dispersed population meant that it was not as attractive as an emerging market as others. This further meant that Australia did not have the same degree of intense competition evident in the U.S.

The Australian market place is small, the number of locally produced substitutes is limited, making the environment less complex. The egalitarian mind frame **overshadowed** capitalist attitudes. The lack of substitutes meant that the buying power of individual consumers lacked the luxury of always being right. Government protection combined with distribution expenses incurred due to the distances involved meant that foreign competition was perceived as non-threatening. The arrival of an increasingly intense competitive environment was slowed to a certain extent as Australia initially received less foreign attention than the U.S.'s more attractive market due to its immense size and the perception of a higher disposal income.

The second effect was the perception by Australian firms, or their decision makers, that this isolation provided a barrier to entry. This was a serious blind spot, which led to a slower uptake and understanding of the value-add in competitive intelligence.

Response to the level of competition encountered has had a different focus in the two countries. The U.S. initially responded with the drive to cut costs as the main focus of their defense but has since realized that this internal myopia was only effective in the short term. They have since moved towards growth strategies and product differentiation to counter competitive forces. Growth strategies require quality competitive intelligence to be effective and so there is an affinity towards the practice as a result.

Unfortunately, many Australian firms are still countering competitive pressure by striving to cut costs alone. This internal short-term view requires

little competitive intelligence and hence there is less demand for the discipline.

There would appear to be a direct relationship between the degree of competitive pressure felt in an environment and the attitude towards the value of competitive intelligence. However, this is not the only influencing factor in the environment.

The availability of public information in the form of database infrastructure, government statistics, trade association statistics and journals, and mediums of analysis will also have an effect. The environment in the U.S. includes an abundance of information available in the public domain. The availability of similar information in Australia is growing, but a difference does exist and this is one of the characteristics of the environment within which competitive intelligence exists. Hall and Bensoussan were surprised with the high proportion of respondents to their 1996 survey of Australian business who made little or no use of electronic sources, now much more available through the Internet.

Government philosophies and the resulting infrastructure also influence the environment. The U.S. has had alliances with other nations, but the sheer size of its own environment has meant that it generates its own approach to business. Australia has a different geographic alliance with a focus on south-east Asia. The Asian culture in turn has had an influence on the way that Australia does business. This relationship and proximity to Asia constructs a different business environment to the one faced by the U.S.

Culture is another environmental factor that influences in two ways - one through a national identity and the other is organizational.

Australian and U.S. cultures have been compared in their origins, although, as is core to any development, have grown into separate entities. Both countries began with vast expanses of land inhabited by indigenous people groups. Both were initially 'settled' by groups from Europe who were either physically or ideologically forced to emigrate. Both take pride in their individualism as a nation and adventurous spirit recognizing the isolation that existed in the early days. However, direct comparison of present day cultures reveals a divergence from similar beginnings.

Australia enjoys the reputation for being laid back and relaxed. Complacency in the form of 'she'll be al-

right' is a national catchphrase. Personal information sharing and open show of emotions is not common. Employment provides the means with which to enjoy times outside of the work place. There is the Australian 'Tall Poppy Syndrome' that enjoys seeing the successful being brought down to earth. The 'sickie', extended annual leave and 'going walk about' are often talked of and imbedded as part of the Australian culture (Sharp, 1996).

The U.S. culture is almost the opposite in many regards. Aggressiveness and assertiveness are core competencies given the right of the customer to have his way. The individual strives to be number 1 competing with all others to stay on top. Long hours, putting work ahead of relaxation, family, and non-work activities is common. Annual leave is often limited to 10 days and any extended periods not spent in gainful employment are frowned upon. The individual strives for excellence and idolizes high achievers. Communication is open often to the extent of being perceived as shameless by other cultures. Instead of cutting down the 'tall poppy', U.S. culture would strive to stand on top of the tall poppy so as to get even higher. And the final mass generalization of note is that often U.S. culture is so inward looking that it fails to comprehend or be sensitive to other cultures and the inherent differences.

Stereotyping and generalization is not accurate or empirical. However, there is some value in understanding the atmosphere within which the corporation exists. Culture has a very deep and implicit influence on behavior, whether we recognize it or not. What is key is to recognize that the direct transfer from one area to another without adaptation for the cultural environment will impact the eventual acceptance and success of the idea.

Management style and organizational culture are also going to be key factors in the degree to which competitive intelligence is accepted and used within an organization.

Simon (1999) identifies some key factors in this interaction - "Key cultural factors that can affect CI practices include the value attached to information, the rules around sharing information, and the perceived threat facing the firm...culture is one of the most critical factors in determining what the organization will use to accomplish its work."

Tied to this issue of culture is the whole aspect of ownership and belongingness to the corporation. Again, a generalization but one of interest, is that U.S. firms nurture loyalty, encourage a sense of ownership, and emphasize that we all do make a difference. Australian's egalitarianism and love of non-work activities competes for this sense of loyalty. Simon (1999) talks of the need to "determine the cultural factors that support competitive intelligence" as part of setting up the function in an organization.

On the issue of corporate culture, Jon Peddie (1992) identified three categories of corporate culture and their relationship to competitive intelligence. In comparing the practice across nations, the overall picture is made up of norms. Jon Peddie's "Isolationist" category describes firms who take their own council, think they know it all, are content in their isolation, and do not see the benefits of competitive intelligence. While Peddie's work was not related to international comparisons, it is interesting to note that the characteristics which lead to this segment being isolated and therefore unresponsive are also evident in descriptions of Australian firms today.

Peddie also talks of "Poorboys" being those firms too small to afford the expense of comprehensive competitive intelligence. Interestingly, this was one of the reasons that Ben Gilad (2003) gave for Australia's slow move towards the discipline. The size and availability of cash will impact the resources available to formalize the process in a firm.

Ownership, participation, un-threatening, accountability, recognition, and open communication are all characteristics of the culture needed if competitive intelligence is to be effective. In Australia the focus is often on life outside the workplace as opposed to the U.S. where people are said to live to work. This is going to affect the culture of the organization and hence the amount of information that flows across the organization.

The topic of intelligence analysis also brings us to another characteristic that would differentiate the practice of competitive intelligence in the two countries. It does not take much reading of authors such as Bensoussan, Fleisher, Gilad, Herring or Sawka to realize that analysis is the fundamental. Deficiencies in analytical ability will not only lower the quality of the intelligence produced, but it will also affect the

perception of its value. As mentioned previously, the proportion of MBAs in Australia is far fewer than those in the U.S. When you tie this to the fact that few business schools even teach the discipline of competitive intelligence in Australia, then a large source of differentiation emerges. It is very hard to formally practice something that you do not know even exists. Competitive intelligence requires experience, analytical competence and a sharp intellect, but it also requires training and recurring stimulation. A CEO in the U.S. will have a much higher chance of recruiting someone exhibiting some form of proficiency in competitive intelligence practices than in Australia.

In Australia, young business students are in short supply, and are not receiving any development in the area of competitive intelligence. Not only will this result in limited awareness of the field, but also their ability to provide intelligence of value will be severely limited. Perhaps the lack of training and ability to provide this level of analysis has resulted in poor practice and is why some Australian managers have a hard time placing value on their trials into competitive intelligence. Bob Galvin of Motorola states that "to be successful, it (CI) takes professionals!" The fact that there are only a couple of competitive intelligence consultancy firms in this country would explain why obtaining quality analysis would be more difficult in Australia. Either Australian firms are not aware of the discipline, or they have a difficult time finding anyone to perform the tasks.

This lack of awareness and skill in competitive intelligence would explain why some firms brush off attempts to encourage the introduction of a formalized approach with the statement that 'we already do it'.

This would also explain another reason for the lack of value placed on competitive intelligence perceived to be evident in Australia by its slower acceptance. Attempting to imitate a successful US model is not going to provide value in Australia. It is not surprising that the desired value is not realized. The culture and environment are so different between the countries that a bolt-on competitive intelligence system will fail to add value. "The challenges inherent in cross-cultural transfer may actually diminish competitiveness, instead of enhancing it. Managers need to understand the cultural context of best practices, both at the source and at the target, in order to overcome these challenges

and facilitate the transfer process" (Guimaraes, Sato, & Kitanaka, 1999).

Culture will shape the competitive intelligence model that is effective. U.S. models will not be directly appropriate in Australia, and managers that have tried to bolt them on may have blamed the practice of competitive intelligence for the shortcomings rather than the ensuing misalignment.

Conclusion

The conclusion is that there is a difference in the practice of competitive intelligence between companies in Australia and those in the U.S. The practice in the U.S. is more formalized, structured, applied more often, and studied. Australia had a later start with less of a sense of urgency to its approach but is moving in the same general direction as the U.S. More and more Australian firms - not just the subsidiaries of large U.S. multinationals - appear to be taking up CI today and are looking at how to formalize and apply it to their organizations. However, there are cultural and environmental differences that have an impact on the practical application of competitive intelligence including management styles and examples of best practice.

Australia has the opportunity to learn from the lessons learnt the hard way in the U.S. and hence be proactive in their initiation of the discipline. While in the past, an unsophisticated and unsystematic approach to CI worked, for Australia it will not work well in today's increasingly complex, increasing competitive, and fast changing global markets in which we participate.

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