

Journal of Competitive Intelligence and Management

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Journal of Competitive Intelligence and Management

The Journal of Competitive Intelligence and Management (JCIM) is a quarterly, international, blind refereed journal edited under the auspices of the Society of Competitive Intelligence Professionals (SCIP). JCIM 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 in Spain: a Situational Appraisal

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Executive Summary

This paper describes the evolution of competitive intelligence (CI) in Spain by looking at the specialized literature available on the subject and analyzing how CI has been adopted and developed in Spanish firms. The second part of the paper introduces the key findings of a survey carried out at the beginning of 2004. Multinational firms and identified best practice firms were studied and compared against an identical CI framework. The paper concludes with a description of the potential barriers to full development of CI in Spain and some of the conditions required in order for this development to be achieved. A perspective for the future is also introduced.

Key Words:

barriers to growth, best practices survey, competitive intelligence, current status, future, literature, multinationals, opportunities for growth, phases of development, small and medium enterprise, Spain, trade associations, unique facets

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Evolution of Competitive Intelligence (CI) In Spain

Terminology

There is no unanimous agreement in Spanish literature regarding the name given to CI. Labels used by practitioners and scholars to refer to the field, include Competitive Intelligence (Tena, 1992; Tena & Comai, 2001), "Vigilancia Tecnológica" or "Technological Intelligence" (Palop & Vicente, 1999a, 1999b; Escorsa & Maspons, 2001), "Economic Intelligence" (Cetisme, 2003) and even "Business Intelligence" or "Company Intelligence" translated as "Inteligencia Empresarial" (CIC, 2003). It has been observed, that all of these labels refer to the same activity, which can be summarized as a systematic method of planning, gathering, analyzing, storing and distributing information on the external environment and improving competitiveness. (Palop & Vicente 1999a and 1999b; Tena & Comai, 2001; Postigo, 2000, Cetisme, 2003; CIC, 2003). Generally speaking, companies which do at least some market research, agree, fully or partially, with the process. Inquiries show that an understanding of meaning is crucial to pinpointing exactly how established a CI unit is within a firm. (Tena & Comai, 2004, a and b). Postigo (2000) observed, from a sample of Spanish companies, that 33% of firms involved in exporting claim that they identify the concept and know the meaning of CI.

Review of Spanish CI Literature

The amount of literature produced in Spain on or referring to CI is relatively small and what there is has only appeared over the last twelve years or so. A small number of Spanish publications on strategic management have recognized the importance of CI as part of the strategic planning process, more or less explicitly, since the early nineties; when dealing with environmental scanning or external business analysis, for example (Tena, 1992). More recently, Spanish companies have tended to accept that CI is one of the best ways of gathering important external information which can then be harmoniously introduced into

the different phases of the whole strategic decision making process. (Tena & Comai, 2003a).

Specialized CI literature¹ can be divided into several main periods reflecting the different stages of the concept's diffusion in the business community. For the purposes of this review we have specified four phases, which are also shown in Figure 1:

1. The "Initiation" or "Discovery" Phase (1991 - 1994)

This period began with just a few scholars, who applied an information system approach in order to illustrate the importance of a business intelligence system. The first book of notable mention is the translation by Lesca (1991), from French, which dedicates an entire chapter to how external information interacts within the firm using an information system lexicon rather than an intelligence lexicon. More specifically, the book on environmental scanning by Tena (1992) includes a chapter which describes how to gather and analyze information on competitors. Also within this phase, IESE Business School in Barcelona had published a number of cases dealing with competitive and competitor information (Aguirre & Vila, 1993; Agell, Carrasco & Segarra, 1990) and Prat (1994) made a video on how to organize competitor intelligence.

2. The "Business Information" Phase (1994- 1998)

The books by Cornella (1994a, 1994b, 1995) and Cornella and Rucabado (1996) encouraged other information experts to consider external information as a key resource for the firm. In the mid-nineties, Alfons Cornella taught several courses on CI to undergraduate students at ESADE Business School in Barcelona. Information resources for business use also became a main topic of discussion and various publications were dedicated to it, such as Portela (1996), Portela and Escobar (1997), Baiget (1999a, 1999b) or Gasull (1999), for instance. The Spanish business information association (ASEDIE) published several studies on the use of business information in Spain carried out by the Statistical Institute of Catalonia (Baiget, 2000).

3. The "Technology" Phase (1998-2001)

If we were to classify the literature in question into three main areas according to central emphasis

(marketing, technology and financial), this period would correspond to the development of the technology side. The COTEC Foundation published two guides by Palop and Vicente (1999a & 1999b), which paid particular attention to technology intelligence. They emphasized how CI can benefit the technological progress of the firm. Both books focus on technology watching. Other contributions in this area include the works by Rodríguez (1999), Escorsa, Rodríguez and Maspons (2000) and Escorsa and Maspons (2001).

4. The “Strategy” Phase (2001 to the Present)

This period refers to the integration of competitive intelligence into the strategic process. Escorsa and Maspons (2001) discuss technological aspects and recognize the importance of the change from surveillance activity to the intelligence process. Indeed, the previous period focused mainly on collecting the information as opposed to the “strategy phase” which emphasized analysis of information with the objective of integrating the resulting knowledge into the strategic process as discussed by Tena and Comai (2003a). There are several works that can be classified in this period. In spring, 2001, the specialist magazine, *El profesional de la información*, which focuses on information and library science, published a special issue on competitive intelligence in which several articles appeared, including those written by Tena and Comai (2001) and Giménez and Román (2001). Cornella (2001) also devoted a chapter of his book to this subject, which focuses mainly on the role of information in the new digital era and the Internet. Subsequent references include the European study made by InfoAct (2001), followed by the work of Cetisme (2003), the study by Sánchez (2002) on software and other CI tools and two

surveys proposed by Tena and Comai (2004a and 2004b). At the same time, the Center for Research into the Knowledge Society (Centro de Investigación sobre la Sociedad del Conocimiento - CIC) at the University of Madrid published a new work (CIC, 2003), which was a summary of its CI experience as discussed by a panel of 9 experts at a workshop, and, at the recent business intelligence conferences “Verite”, CI was discussed using 4 main topics.

This review described several major works on CI which have been published in Spain by a variety of contributors. Some of these contributors are scholars with some practical connection to CI, from consulting work or participation in European projects, for instance. Others are practitioners involved in academic activity. It has also been observed that there has been a visible increase in the number of publications focusing on CI over the past few years. For instance, a new digital CI magazine *PUZZLE* (<http://www.revista-puzzle.com>) has recently been launched, with the purpose of promoting CI throughout the Spanish speaking world. Moreover, an increasing number of publications currently use the terms “competitive, business or economic intelligence” in order to identify the subject they are dealing with.

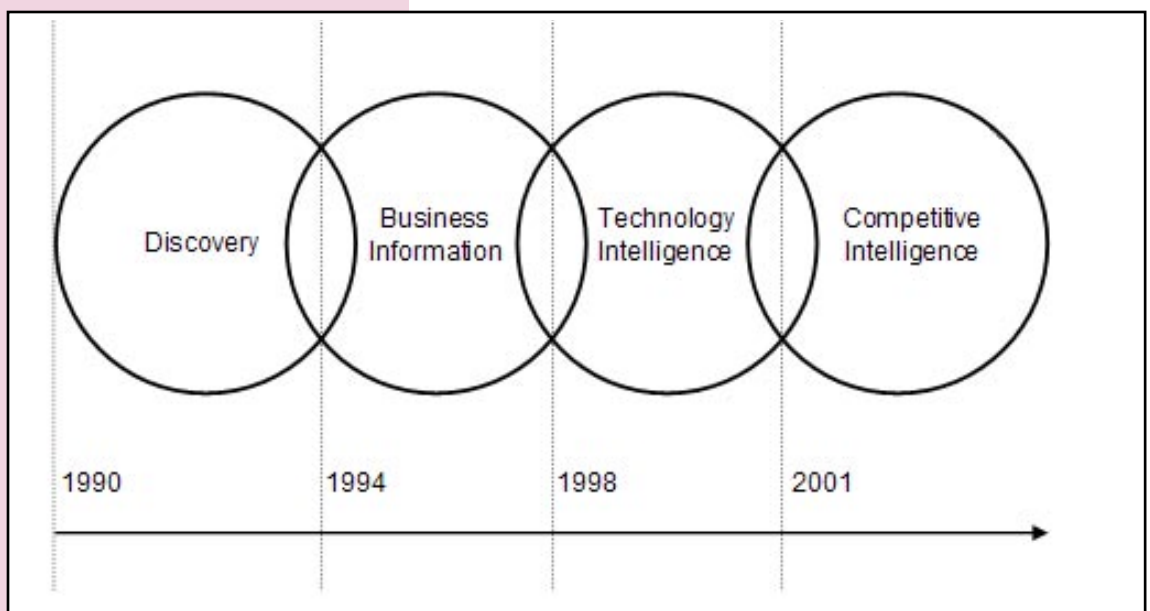


Figure 1: The Four Periods of CI in Spain

Current Status of CI in Spain

Type of Companies Doing CI

Empirical studies show that the majority of Spanish firms do not carry out CI in any systematic manner. Postigo (2000, pg.71) argues that “despite growing interest in the area, competitive intelligence as a business discipline is not popular in Spain”. He also observed that “three-quarters of the firms surveyed claim that they monitor the competitive landscape informally or sporadically”. The recent study by Cetisme (2003) observed that a large number of European and Spanish small and medium size enterprises (SMEs) have precise guidelines for gathering strategic information but that these are not followed in any systematic manner. Small and medium size enterprises find it harder to define a CI program and hence, the smaller the company, the weaker the level of CI activity. The same report states that larger firms tend to handle the management of external information far better (Cetisme, 2003). However, SMEs may carry out CI in a cost-effective way by buying competitors’ products, for instance, or by obtaining information from the sales team on competitive sales and practices. The Internet is also a good source of intelligence and, according to Palomeras (2002), is inexpensive and thus particularly suitable for smaller firms. A practical example of how a SME can apply these concepts can be found in Sicilia (1997).

The way information is managed in large companies seems to be fairly different. Catalan multinational companies are more familiar with the application of CI in their business practice, as was demonstrated in the recent survey carried out by Tena and Comai (2004a). The study reveals that approximately half of the multinationals are using coordinated programs for collecting, classifying, analyzing, and distributing information. However, the survey indicates that CI is mostly being carried out in the marketing department and only a few companies have a centralized system to enhance cross-functional CI activities.

Number of Companies Conducting Formal CI Operations

There is currently no data available regarding the number of companies carrying out CI in a systematic manner. The various studies that were made in Spain (Postigo, 2000; InfoAct 2001; Cetisme 2003; Tena &

Comai, 2004b) do not describe the extent of CI practice in sufficient detail, given the rather different research goals and methods used from one firm to another. Cetisme (2003) focused on a number of Spanish companies which were involved in innovation process acquisition, Postigo (2000) surveyed 716 export-oriented companies, and Tena and Comai (2004a) studied 156 Catalan multinational companies. These studies found that Spanish companies were in the initial stages of establishing ongoing CI processes and coordinated activities. A study by PricewaterhouseCoopers (2002) showed that companies have dedicated their resources primarily to internally focused projects, making CI a lower priority.

Trade Associations Conducting CI Activities

There are several trade associations working as CI units for their members. A good example is ASCAMM, in the plastics sector, which provides various types of information and services to its members, such as carrying out specific market research, selecting suppliers and testing products (Saurina, 2003). Another example would be Aidima (association of furniture makers in the Valencia region). They have developed a number of CI products for SMEs. They offer a service in the economic intelligence area called “Smart Furniture”, which delivers recent information reported by EuropaPress (2003) to associated SMEs. These two cases show that trade associations can replace the CI unit for those companies which do not have sufficient resources to carry out CI activities in an ongoing manner. In fact, the associations are able to solve key intelligence issues for their members. As discussed earlier in the paper, although a SME may not carry out any systematic CI directly, it can apply the CI approach in a project-based system through a trade association.

Potential Indicators

Although there are few indicators available to help us define the current status of CI in Spain, the following two indicators can be used as proxies for expanding CI activity: the number of CI consultancies and the courses and training sessions offered. First of all, there are few small consultancy firms in Spain (employing 2-3 people at the most), and these are located in the areas where most technological firms operate, that is, in Barcelona, Madrid, Valencia and the Basque Country. On the other

hand, the courses offered usually take place in the same areas.

The universities or colleges that are known to offer courses in CI are, in Barcelona, the Higher Institute of Marketing (ISM), the Institute of Catalan Technology (ICT) and the Open University of Catalonia (UOC); and in Valencia, the Polytechnic University of Valencia runs a seminar on technology intelligence, offering students 4 credits.

Some Findings from a Best Practices Survey

This section of the paper will put forward the key findings of a survey on competitive intelligence operations in 9 Spanish best practice firms carried out by Tena and Comai (2004b). Its main purpose was to examine the type of system these best practice companies apply when planning, gathering, analyzing and distributing economic intelligence within their organization.

A survey was circulated in the second quarter of 2003. The main objective of the survey was to collect a significant amount of data in order to build a comparative model of best practice and to provide relevant clues for other Spanish companies in the early stages of CI program development.

Since CI is a relatively new discipline in Spain, the authors have used different sources to identify a potential group of companies that could be part of the sample using direct and indirect contacts. Companies were selected on the basis of 3 key indicators:

- the degree of knowledge regarding competitive intelligence practice
- the age of the firm's CI unit (more than 2 years old),
- the number of full time or equivalent staff involved in the activity (more than 1 person)

At the onset, it was assumed that the concept of CI was properly understood and that a CI process had been applied in the company. Nine companies from different sectors were found to pass these selection criteria and were, therefore, suitable candidates for participation in the survey. A web-questionnaire was used to elicit

information on the CI program as a whole. The survey can be summarized in 6 key findings:

Key Finding 1: Focus and Clients

The competitor, the product and the industry (market-sector) are the main focus of the CI best practice units. For instance, 89% of companies showed that information regarding direct, indirect and potential competitors is crucial to their business decision-making process and has become an integral part of future planning. However, other types of external information, such as global environment data and technological information are collected to serve different needs. In fact, information regarding competitors, markets and products is gathered mainly to cover marketing and strategic needs, although special attention is also paid to R&D and product development needs, covered by technological and scientific information.

Key Finding 2: Position

CI best practice units adopt a fundamental, centralized model for coordinating and developing CI activities. Each unit seems to employ a different number of staff although one quarter of best practice companies have between 2 and 3 full-time equivalent employees whose job is to research, classify, analyze and distribute information. However, two of the companies surveyed employ more than 6 specialists.

Key Finding 3: Source Value and Frequency

External networks play a central role in the Spanish best practice firm's collection activity with regard to benefit/contribution to corporate intelligence. However, external reports, the Internet and online databases also play a central role in the Spanish best practice firm's collection activity. The Internet is used as a primary digital information source, such as competitor web pages, for instance, as well as a medium for acquiring information from business information aggregators, such as databases or subscriptions pages. For instance, pharmaceutical companies, which constitute the main group of the companies surveyed (44.4%), make extensive use of external "information banks" offering online information services. However, Spanish best practice companies rated external "hard information" sources such as newspapers or reports as highly important.

With regard to the most frequent means of information collection, best practice firms rate the Internet higher than any other medium, even though contact networks are given greater value by best practice companies than Internet sources. In fact, interviews and primary information techniques are rated lowest even though they are used regularly by best practices companies. Document subscription and on-line information are used quite often.

Key Finding 4: Analysis Models

SWOT is the analysis tool most widely used although other models are employed to produce intelligence for the decision making process, such as benchmarking, product comparisons analysis, scenario analysis, competitor profiling analysis and patent analysis, for instance. All companies report that CI plays an important role in their strategic planning process and in the formulation of the firm's strategy.

The primary objective of the best practice CI unit is indeed to support strategic management. A second group of objectives are to have a better understanding of the competition and to support tactical decisions. Other objectives, such as anticipating external threats and understanding competitors' products and markets are quite important for best practices companies even though the diversity between them is becoming more perceivable.

Key Finding 5: Information Technology

Information technology (IT) plays a key role in the gathering, delivering and sharing of competitive information within the organization. The two preferred IT tools for communicating formal and informal information between the CI staff and internal clients of best practice companies are email and the corporate intranet. Other communication mediums are less frequently used, such as, hard copy or voice, for example. Moreover, 88.9% of best practice companies have a specialized web space (intranet) dedicated to competitive intelligence through which they collect and distribute intelligence.

Key Finding 6: Process and Protocols

There is a different balance between CI primary activity, which focuses on the intelligence cycle, and support activity, which focuses on the administration or

management of the CI program. Best practice companies are in the process of establishing various procedures, which will allow them to coordinate the primary CI operation. For example, corporate security, CI protocols, and education programs are more frequently developed than CI audits and counterintelligence operations. However, the majority of these activities are in the early stages of their development in most best practice companies. On the other hand, best practice firms tend to conduct qualitative and quantitative studies regarding the effectiveness of the CI unit and the CI projects in order to measure, principally, the level of general effectiveness and tangible benefits.

Comparison of Best Practices

This section makes a small number of comparisons between the CI practices of two corporate survey groups and offers a major conclusion and recommendations. The main difference between two groups of companies - the best practice Spanish company survey group (Tena & Comai, 2004b) and a Catalan multinational survey group (Tena & Comai, 2004a)² are:

- Best practices firms cover different types of strategic and tactical needs in the various organizational areas whereas multinational firms cover primarily marketing needs.
- Best practice companies have centralized CI units, in contrast to half of the multinationals' CI departments that are part of the marketing research department
- The Internet has been accepted as the most exploited source and medium for both sample groups. However, a significant difference can be perceived between the value ascribed by best practice companies and multinationals to external networks as opposed to the Internet.
- Best practice firms employ a greater number of analysis models and at a higher level of frequency than the multinationals.
- With regard to IT infrastructure, best practice companies and multinationals make extensive

use of email. However, approximately one third of multinationals employ a CI web page whereas almost all best practice companies have adopted a personalized competitive intelligence portal.

- Finally, there are no significant differences between the best practice survey group and the multinational sample regarding the development of primary activities that support the CI function, which, in both cases, appears to be in its initial stages.

The survey reveals that no universal CI framework is used in Spanish best practice firms. Indeed, there are significant differences between sectors with regard to sources, priorities and models used to analyze competitive information. It is the marketing department that embraces the majority of CI activity. Indeed, the marketing function seems to be one of the best initial and natural places for CI to grow. However, there are a few technologically-oriented companies that make significant use of competitive and technical intelligence.

On the other hand, information technology is widely applied in best practice companies and it plays a major role in all the companies. In fact, a digital intelligence repository seems to represent a common standard for any Spanish CI unit. However, particular attention should be paid to the reinforced security policies applied not only to IT but also to intangible knowledge. The intensive application of IT, for those companies that are CI oriented, seems to have contributed to the unit's strategic position. The supposition is that part of the centralization strategy of the unit originates from the degree of IT application in CI.

A final thought that can be made from the study is the fact that the main CI activities are widely developed in Spanish best practice firms. However, most Spanish companies need to emphasize CI management activities and protocols, such as, the development of a code of ethics or a formalized measurement system to assess the performance of the CI function and its value contribution to the firm. All of these methodologies have the potential to improve management practices and increase company competitiveness.

Unique Features of CI in Spain

Like other European countries, Spain's economy is characterized by an industrial structure consisting primarily of small and medium enterprises (SMEs)³. The Ministry of Industry in Spain considers that almost all Spanish firms are SMEs.

This structure has given rise to a large number of trade associations, which join together similar SMEs from the same industry or sector and provide a wide range of information services. Approximately 15 and 20 associations have been identified that provide different intelligence services, from technical to commercial information or from the general to the very specific. For instance, the Ascomm mould and plastic association, based near Barcelona, has developed a systematic activity for carrying out technical surveillance with the aim of giving some attention to new solutions which can directly or indirectly improve the equipment used by their associates. Moreover, Acamm has developed an "ad hoc" service which can provide competitive intelligence to its associates using market research or the development of new technology. Another example is Aidima, a furniture trade association, which provides intelligence to 600 members and uses 4,000 different information sources (Postigo, 2000).

Moreover, there are several government services, in some Spanish regions, which offer systematic information on demand. An interesting example is the case of Zaintek, based in the Basque region, which offers 5 types of products to 450 SMEs, such as information regarding firms, markets, products, technology or state subsidies. The 4 people on the Zaintek team use numerous secondary sources and an extensive network of experts to answer the different types of enquiries. The model they have developed is considered a benchmark for other similar projects currently under development in other regions.

Challenges to the Growth of CI

Barriers and Conditions

There are several issues to be studied when looking at the way in which CI is developing in Spain. Postigo (2001) argues that there are three main reasons why CI is failing to attract attention:

- The concept of CI has not been clearly defined among Spaniards and it can easily be confused with industrial espionage
- CI is a global activity and cannot be treated as part of the marketing function
- CI requires a formalized process.

We believe that there are some other additional issues that are hindering the development of CI in Spain.

1. The formalization of CI is the expression of an advanced strategic culture. If there is no strategic management planning, then there is no need for a formalized intelligence process. During the latest research project of Tena and Comai (2004a), it has been observed that those SMEs which have no marketing unit, or at least no person who is in charge of this area, also have no systematic environmental scanning activity. Although this does not prove that SMEs are not using intelligence in their business practice, it does, however, induce us to believe that they are not using a formalized intelligence process. Companies which displayed formalized CI activity accomplished this activity mostly through the marketing department and, in some cases, the CI department was a spin off of the marketing department.
2. Over the past few years, most attention seems to have been given to knowledge management in companies which have succeeded in developing an effective intellectual capital practice. For instance, a study by PricewaterhouseCoopers (2002), focusing on the use of knowledge management (KM) and intellectual capital in Spanish firms, discovered that CI activity occupies a low relative priority on corporate project lists. The same study observed that firms showed more interest in projects that are internally focused, such as intranet development, best practices adoption or e-learning, to give a few examples. On the other hand, experience shows that knowledge experts place CI practice under the KM umbrella.

3. CI has long been associated with technology watch or surveillance in Spanish literature (Palop & Vicente, 1999a and 1999b; Escorsa & Maspons, 2001). In this context, some instruments were developed (Sánchez, 2002) to enhance technology intelligence effectiveness.
4. Finally, Spanish managers seem to be suffering from information myopia. "A significant number of businessmen will admit that they know very little about their competitive environment, yet they see no need to implement intelligence systems. In some cases, this is because they consider their current systems to be sufficient and, in others, it is because they are unaware that any alternative systems exist." (Postigo, 2001). On the other hand, most SMEs seem to be interested in adopting a CI system (Cetisme, 2003). During the survey of the multinationals, we also observed a positive attitude towards CI.

We think that there are a few external conditions which can bring about an increase in the rate of CI application, since innovative sectors can be an important factor in encouraging the adoption of CI. Cetisme (2003) observed that those "companies which come from innovative sectors pay more attention to the management of strategically important external information than their counterparts in traditional sectors".

Other research showed that technical surveillance has a positive impact on the innovation process and product development (Portela, 1999; Solé, Valls & Condom, 2003). Furthermore, systematic monitoring of the competition allows firms to improve current or new products by providing ideas for new, more advanced solutions (CIDEM, 2001). Anecdotal observation also demonstrates that CI is often promoted in technological centers, such as Madrid, COTEC and LEIA, to give a few examples, and by important sector associations, as discussed previously in this paper.

Conclusion – The Future of CI in Spain

It is assumed, given recent developments, that CI, in its various forms, will have an increasing presence in Spanish companies, especially the largest ones. We

consider that the growth in CI will be significant, for two main reasons. First, the number of innovation programs developed by companies will increase, which is directly related to CI (Tena & Comai, 2003b). Secondly, there will be an increase in the general consensus regarding the value of knowledge management, of which CI is often considered to be an important component.

It is more likely, however, that the diffusion of CI practice will take place gradually, starting with the largest and more technologically dependent companies. The relatively small number of companies of relevant size coupled with the large share of the Spanish economy held by multinationals (which carry out most of their CI in their home countries) makes it difficult to be openly optimistic about the future.

Notes

1. An additional bibliography of Spanish CI literature can be obtained from: <http://www.incontrointeligencia.com/central_rec_res.htm>.
2. This study was carried out by Joaquín Tena Millán and Alessandro Comai simultaneously to the development of the Best Practice survey. The study was based on 156 multinationals based in Catalonia (Spain).
3. The European Community defines any firm with less than 250 employees as a SME.

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