



Global Market Intelligence Survey 2008

GIA White Paper 2/2008

The GIA White Paper “Global Market Intelligence Survey 2008” uncovers linkages between organizational decision-making and Market Intelligence operations. Differences by industries and regions were measured along with key success factors of MI. Responses were collected from 439 participants on five continents, making the survey the most comprehensive study that has been conducted in area of Market Intelligence to date.

EXECUTIVE SUMMARY

“MI infrastructure” in place, investments expected to increase

In the researched organizations, the average age of the MI operation was 7 years, and an average MI team consisted of 10 people. As many as 60 percent of the respondents expected the investment in MI in their organizations to increase over the next 2 years. The MI budget of an average organization amounts to 0.1 percent of annual revenue.

Investing in MI increases the quality of decision-making

Companies without an MI system in place are significantly more often concerned about making wrong decisions than those with organized MI activities: 45 percent of the respondents without MI operations doubted the quality of decision-making in their organizations, whereas only 30 percent felt the same in companies with systematic MI activities. This clearly indicates that investing in MI facilitates confident decision-making that is justified by analyzed facts.

The ultimate challenge for MI: Filling in the information gaps in decision-making processes

There is still work to be done in many organizations on fitting the right intelligence output to the right information gaps in decision-making processes. The survey results suggest that many companies may have a relatively sophisticated MI “infrastructure”

existing already, but improving its impact on strategic planning, sales, marketing, and product development could easily increase the return on the MI investment significantly.

Different levels of MI maturity across industries and regions

On the average, Market Intelligence operations are being utilized most actively in the knowledge intensive healthcare, technology, media and telecom sectors. Of the companies still without an MI operation, chemicals, trade, logistics and transportation industry companies are the most eager to launch one. Energy, utility and materials companies are investing heavily in MI partly in the wake of the environmental awareness trend. From the regional perspective, Europe and North America have progressed furthest in the field of MI, while especially Latin America will see strong developments over the next few years.

Market Intelligence operations currently at “Intermediate” level

An MI development framework developed by Global Intelligence Alliance was used when asking the respondents to evaluate their own company’s current state of MI development. Most of the researched companies turned out to already have relatively sophisticated MI operations, with all key success factors averaging at “intermediate” or “advanced” levels.

Culture is the most difficult KSF of Market Intelligence to master

In the survey MI culture was perceived as by far the most difficult key success factor to master. Considering how many respondents throughout the survey brought up the critical role of top management support (and often complained about the lack of it), perhaps the single most efficient booster towards a world class MI culture would come from the CEO giving his/her articulated blessing to corporate Market Intelligence efforts.

Outsourcing of Market Intelligence growing rapidly

Outsourcing is seen as a crucial tool in MI in the future. Nearly 50 percent of the participants in this study expect that the efficiency and quality of their MI operation will be improved in the future by outsourcing parts of the process to external partner companies.

Increasing need for Market Intelligence during weakening global economy

75 percent of the respondents saw the need for MI to increase during a global economic downturn. The challenge is to balance the MI efforts and their cost better than ever, and justifying any budget increases will require highly targeted Market Intelligence that ties in to decision-making processes on a very concrete level.

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INTRODUCTION

The majority of international companies today have at least some sort of Market Intelligence operation in place, whether formalized or not. The need to systematically gather and process information from the external operating environment is generally seen as a vital element in making justified business decisions. Yet the impact of Market Intelligence activities is hard to measure because of their “soft” nature, and many decision-makers have expressed a strong interest in improving their understanding of how their companies are benefiting from investing in systematic MI.

The Global Market Intelligence Survey 2008 looks into the current state of Market Intelligence activities in international companies, the perceived impact of them, and the gaps that should still be filled in order for decision-makers to feel that their business moves are always being backed up by timely and accurate information. The research focused on discovering how MI measures support decision-making on an everyday basis, and an assessment was also made about the future developments in the area of MI. To add an interesting and previously uncovered angle to the existing research base about MI, differences in the status of organized MI across geographical regions and industries were also studied.

Global Intelligence Alliance has previously conducted two studies about Market Intelligence activities in international companies.¹ While the Global Market Intelligence Survey 2008 in its approaches builds on the insights already created in conjunction with the earlier studies, it differs from them in three aspects:

- The 2008 survey was conducted as a web questionnaire
- The target companies included both large global organizations and smaller, regionally operating ones
- Differences in MI across regions and industries were studied

A total of 439 respondents from 29 countries took part in the Global Market Intelligence Survey 2008, making it the most extensive survey ever conducted about MI in international organizations. The main hypotheses driving the research were:

- The efficiency of corporate decision-making suffers from the lack of timely and accurate business information to back it up
- A sophisticated Market Intelligence operation can significantly improve the efficiency of decision-making
- Going forward, the need for systematic MI will still increase, as decision-making will continue to be distracted by random and non-processed data
- The level and age of MI operations differs significantly between regions and industries

Definitions

Throughout this report the following definitions will be used:

- **Market Intelligence:** Market Intelligence (MI, often also referred to as Competitive Intelligence or Business Intelligence) is a distinct discipline by which organizations systematically gather and process information from their external operating environment. The purpose of Market Intelligence is to facilitate accurate and confident decision-making that is based on well prepared homework, i.e. processed and analyzed business information. Insights generated through the Market Intelligence effort not only improve planning, decision-making, operations and performance, but also improve the clarity with which the voice of the customer is heard. Organizationally, Market Intelligence may be the name of the department that performs the roles of both market and competitor analysis.

¹ The Global MI Studies 2005 and 2007 have been published under the GIA White Paper series and are available for free downloading at www.globalintelligence.com.

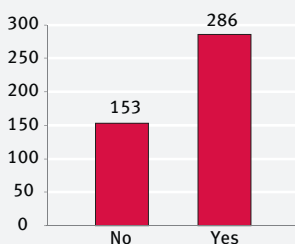
- **MI professional:** Persons that are primarily involved in the organization's activities to gather and analyze market information (as opposed to primarily using Market Intelligence for decision-making)
- **MI user:** Persons that are primarily involved in decision-making, therefore making use of Market Intelligence as end users

Design and implementation of the research

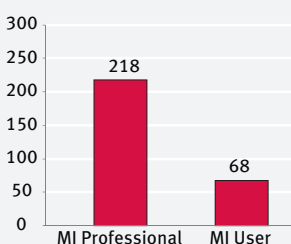
The survey questionnaire was designed by a project team at Global Intelligence Alliance Group, and finalized in a group consisting of all GIA Member companies that took part in conducting the survey. Most of the questions were of multiple choice format to facilitate quantitative analysis. Some open questions were, however also included to add to the level of insight. English was used as the survey language in every country to avoid potential differences in interpreting the questions.

Most of the survey respondents were invited through email send-outs, but the survey was also advertised among the global MI community. To ensure the relevance of the results, the essential target group only consisted of companies that could reasonably be assumed to have an MI system in place. Both MI professionals and MI users were targeted, with the aim of an 80-20 percentage distribution of responses between the groups, respectively. Additionally, the goal was to have the results divide across industries as evenly as possible.

Graph 1
Existence of MI operation in respondent's company

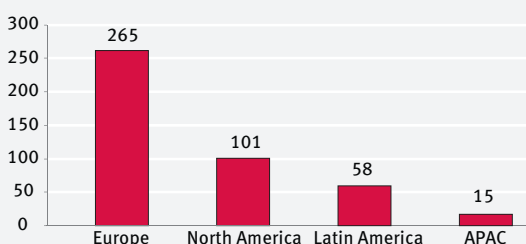


Graph 2
Role of respondent in company*

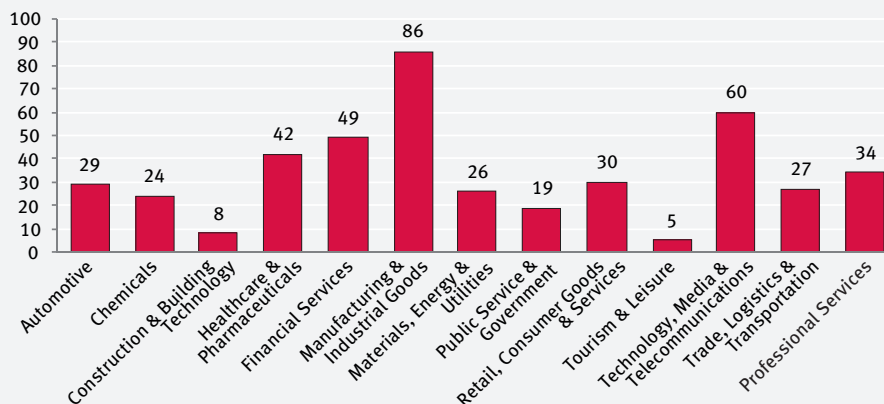


*) Responses only from companies with an MI operation in place

Graph 3
Geographic division of responses



Graph 4
Division of responses by industry



THE CHALLENGE OF DECISION-MAKING

One of the key ingredients in the success of any enterprise is the quality of decisions made in the organization. In the long run, it is quite self-evident that the quality of the information that backs up decisions is one of the key drivers of the organization's eventual success. Yet when asked about the perceived efficiency of decision-making in their respective organizations, most of the respondents saw plenty of room for improvement.

Decision-making in organizations is only moderately efficient

In its report published in September 2007, the Economist Intelligence Unit also asked corporate decision-makers about the perceived efficiency of decision-making in their organizations². The tone of the responses was even slightly more negative than in this survey. The slight difference may suggest that gaps in numerical data (traditional Business Intelligence) impede decision-making even more than those in qualitative market information. Regardless, the results of this survey echo those of the EIU one: Way too often decision-makers feel that they do not have all the information available that they would need in order to make well informed decisions.

Market Intelligence is being utilized poorly in decision-making

Based on the survey results, a sophisticated Market Intelligence operation is a vital support system to decision-making – provided that the MI output matches well with the decision-makers' true information needs. Interpreting the responses to the survey, there is still work to be done in many organizations on fitting the right intelligence output to the right information gaps in decision-making processes. This, combined with the findings about the average age and size of the MI operation (quite well established in an average respondent organization), suggests that many companies may have a relatively sophisticated MI "infrastructure" existing already, but improving its impact on decision-making could easily increase the return on the MI investment significantly. Tying in Market Intelligence to strategic planning, sales, marketing, and product development still closer than before was mentioned by many respondents as the means to take the operation's value and impact to the next level.

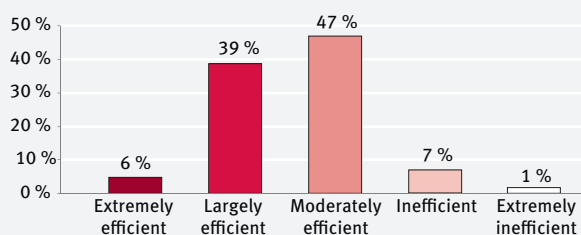
The challenge of making well informed decisions is most clearly evident from the responses by respondents in companies that do not have a formalized Market Intelligence operation existing at all. Many decision-makers feel clouded by the magnitude of information available, and are therefore compelled to make poorly supported and often delayed decisions.

Sophisticated Market Intelligence operation significantly facilitates decision-making

According to the survey, only 10 percent of decision-makers in companies that do not have an MI operation in place find accurate information exactly when they need it. In companies with Market Intelligence operations, more than 80 percent find the information at least after a short delay. Not surprisingly, nearly 50 percent of decision makers without access to timely market information obtain the needed information after a long delay or not at all. Clearly this should motivate any company to set up at least some sort of formalized MI activities to facilitate more efficient decision-making.

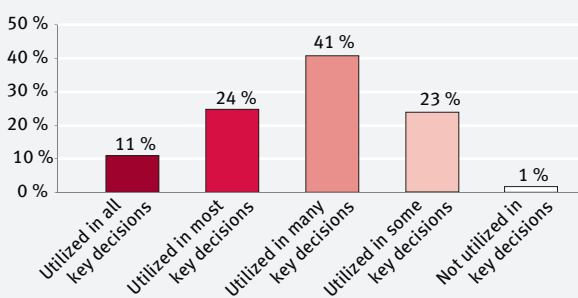
Graph 5

How efficient do you consider executive decision making to be in your organization?



Graph 6

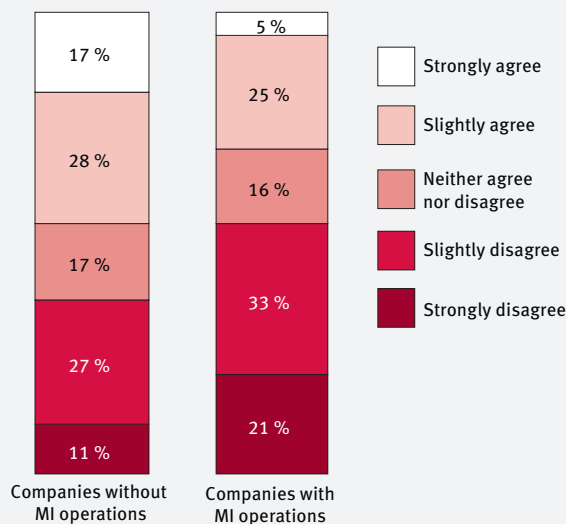
How well do you think systematic MI operations have been integrated with executive decision making in your organization?



² The Economist Intelligence Unit: In Search for Clarity, September 25, 2007

Graph 7

We are often concerned about making poor decisions because of faulty, inaccurate or incomplete information about the external operating environment



Companies without an MI operation are concerned about making wrong decisions

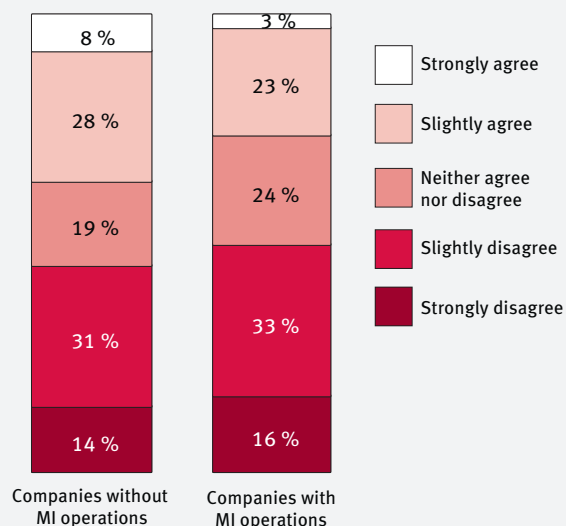
Already faced with inadequate and slow access to information, companies operating without the support of MI are also concerned about basing their decisions on inaccurate or even faulty information. Nearly half of the respondents fear that this will put the company's competitiveness at risk.

Information overload causes delayed decision-making in companies without a Market Intelligence operation

A third issue raised by companies without an MI function is the massive amount of information available. The useful pieces of data are surrounded by hundreds of irrelevant ones, and the lack of a filtering and analysis process often has decision-makers backing up strategic planning by gut feeling rather than researched facts. This is hardly thorough enough homework to support decisions that will direct the company to the future.

Graph 8

Our decision-making processes are often delayed by the huge volume of information about the external operating environment that we need to process

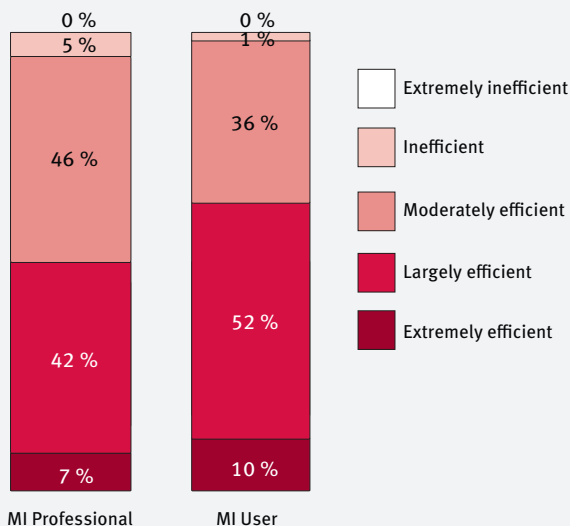


Disconnect between MI professionals and users in perception of decision-making efficiency

An interesting observation made through the survey is the notable difference in how MI professionals and MI users perceive the efficiency of decision-making. Most MI users find their decision-making largely efficient, whereas MI professionals who have the cutting edge knowledge of support mechanisms available, see decision-making as only moderately efficient. This suggests that there is demand for increased communication between those who mostly produce Market Intelligence and those whose primary role is to utilize what has been produced.

Graph 9

How efficient do you consider executive decision making to be in your organization?



This finding again relates to tightening the linkage between MI and business processes:

- Decision-making related to strategic planning, sales, marketing, and product development drives the needs for Market Intelligence
- Both MI users and MI professionals should have a shared understanding of these needs
- Based on the shared understanding, MI output should be able to back up strategic planning, indicate sales leads, help identify business opportunities and provide other types of concrete support to decision-making in different business processes

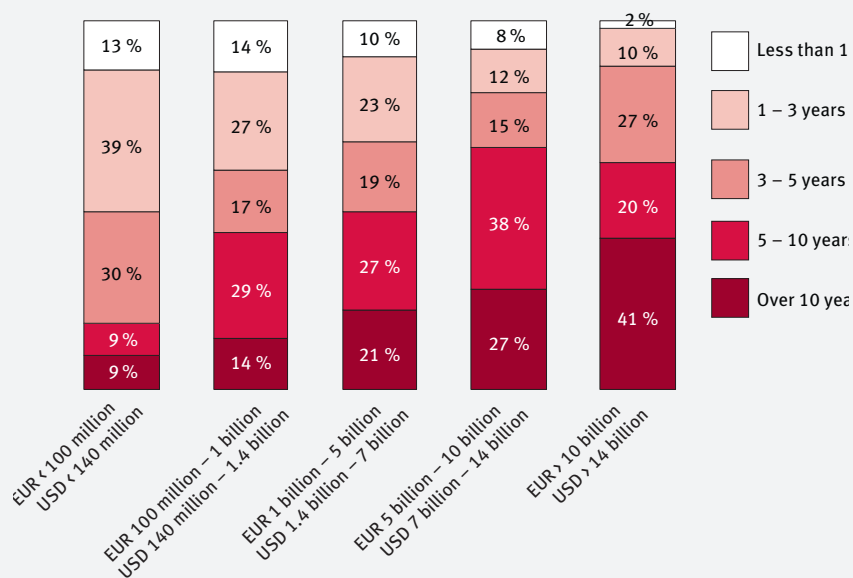
MARKET INTELLIGENCE OPERATIONS TODAY

Average age of Market Intelligence operations is 7 years

In the surveyed companies, Market Intelligence operations have been conducted for almost 7 years on the average. The organizational function in charge of MI includes an average of 10 people, yet the differences are significant among a survey group where some companies have very long roots to their MI activities and others hardly even have a term in use for the activity of monitoring their operating environment.

Graph 10

Age of MI Operation

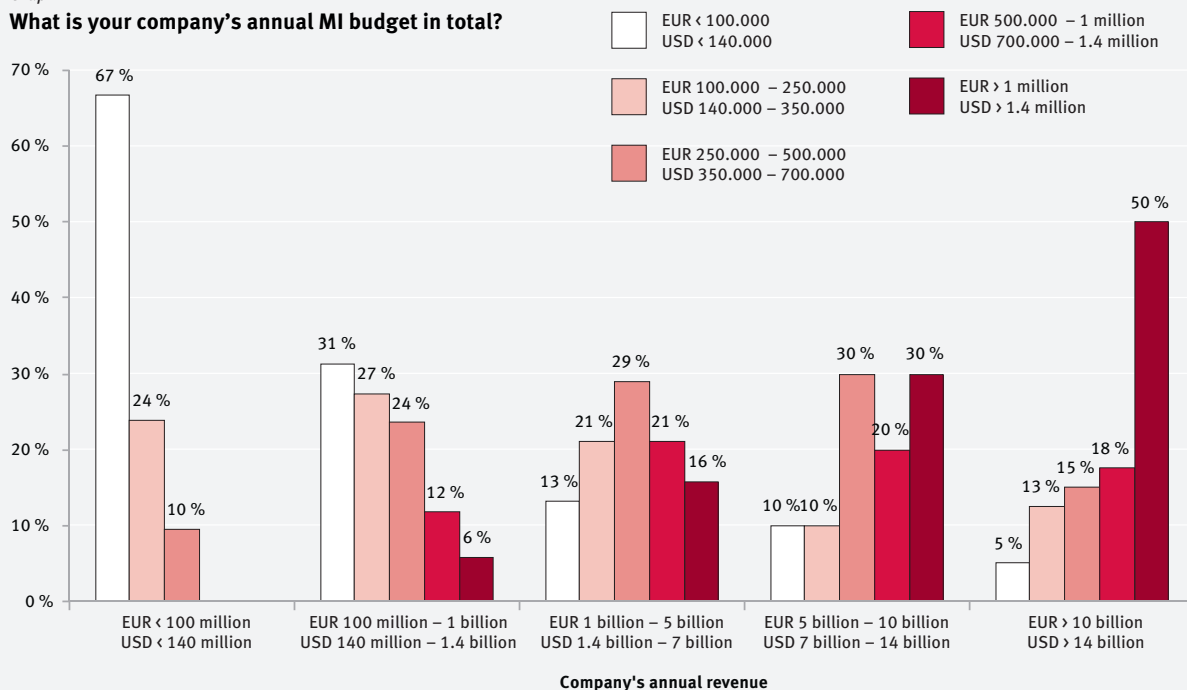


An average company spends 0.1 percent of its annual revenue on MI

A somewhat interesting finding from the research was that small companies that participated in the survey use a significantly larger proportion of their annual budgets on Market Intelligence than large ones. Calculated as a proportion of annual revenue, the MI budget of small companies was 0.2 percent, whereas the figure for large companies was only a tenth of this.

Graph 11

What is your company's annual MI budget in total?

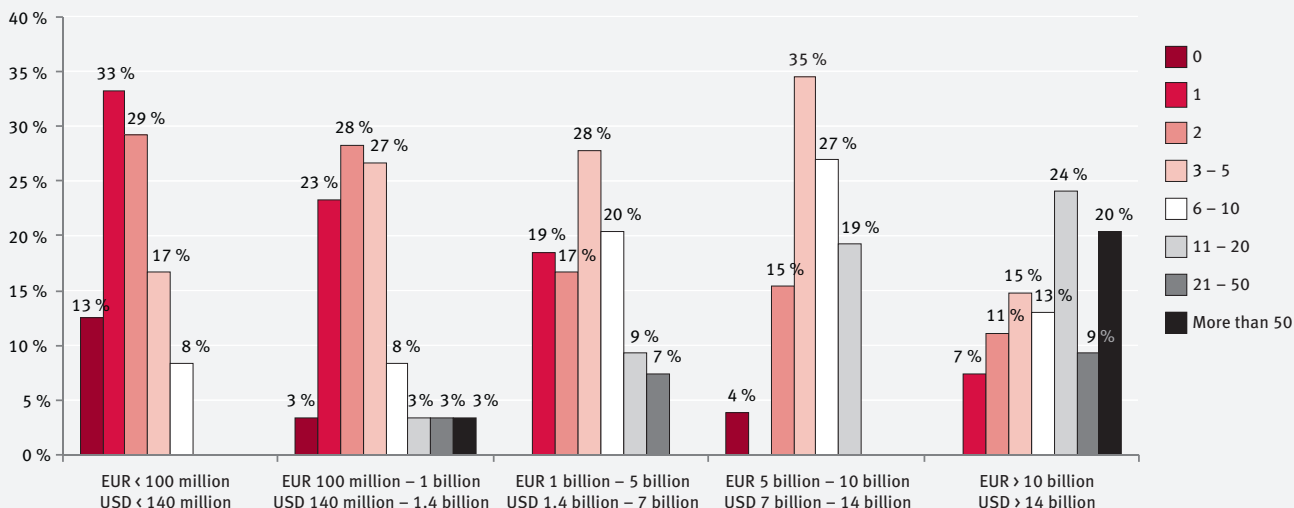


On top of information sources and software, organizing an intelligence operation requires human resources. Graph 12 below tells – not surprisingly – that generally speaking the size of the MI team grows with the size of the company and the length of the MI tradition overall.

With size however, the variation in the headcount of the MI team also increases, suggesting that the ways in which the MI operation has been resourced nowadays vary a lot with regards to the level of outsourcing. Using external services instead of increasing internal headcount has become a viable option for companies with the increasing availability and sophistication of MI services in the market.

Graph 12

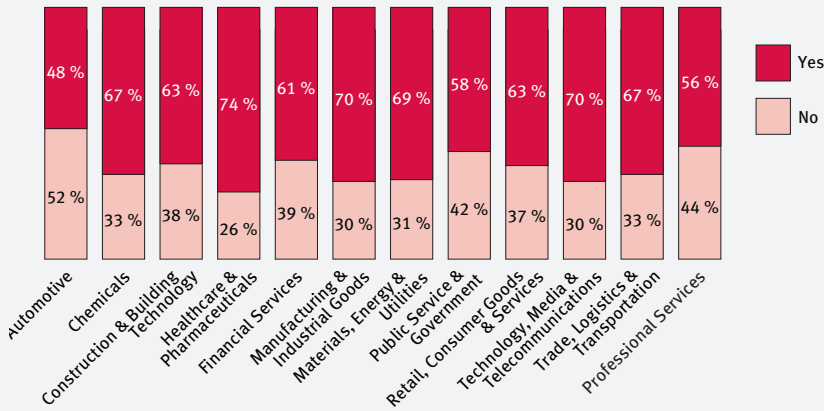
How many people in your organization have Market Intelligence as their primary job description?



MARKET INTELLIGENCE ACROSS INDUSTRIES AND REGIONS

Graph 13

Does your company have systematic Market Intelligence operations in place?



One of the popular topics in Market Intelligence has traditionally been the MI content services that are available in different industries. Countless MI content providers have specialized in certain verticals in order to be able to provide analytical enough content to customers' requirements.

At the same time, little analysis is available on how customer companies in different industries utilize Market Intelligence, and whether there are differences in the length of tradition and level of sophistication of the MI functions across industries.

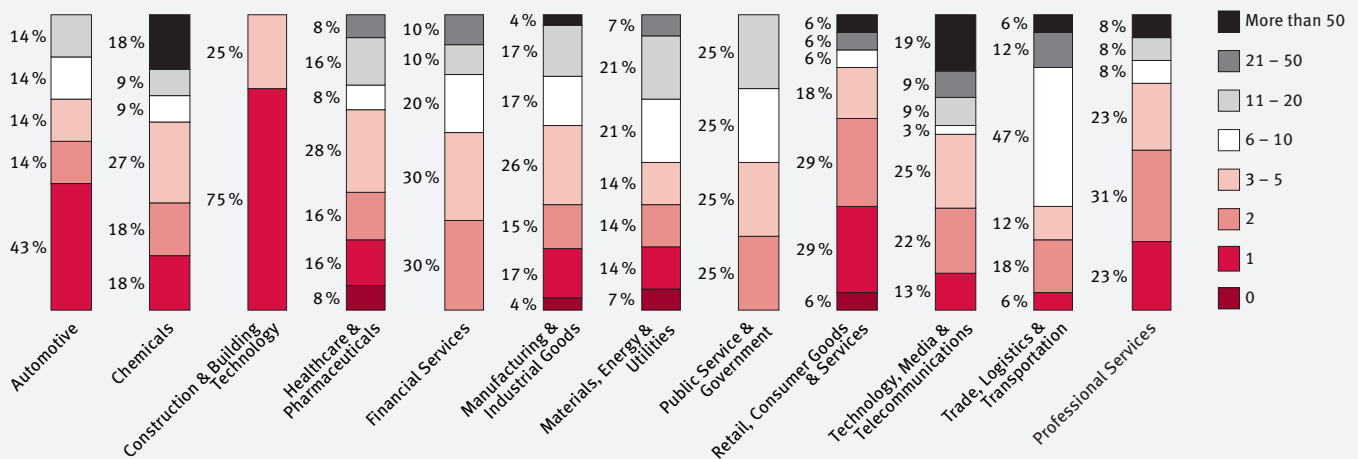
For the purpose of researching this, the participating companies were divided into 13 industry groups. Some clear contrasts were evident between the different groups.³

“Healthcare” and “Technology, Media and Telecom” are traditionally most active in Market Intelligence and have the largest MI teams

On the average, Market Intelligence operations are being utilized most actively in the healthcare, technology, media and telecom sectors. This is hardly surprising, given the highly competitive and knowledge intensive nature of these businesses already at the time when the brick and mortar industries still relied heavily on “gut feeling” intelligence. More recently, the more traditional industries have of course bridged the gap to a large extent, which is also reflected by the future investment plans discussed later in this chapter.

Graph 14

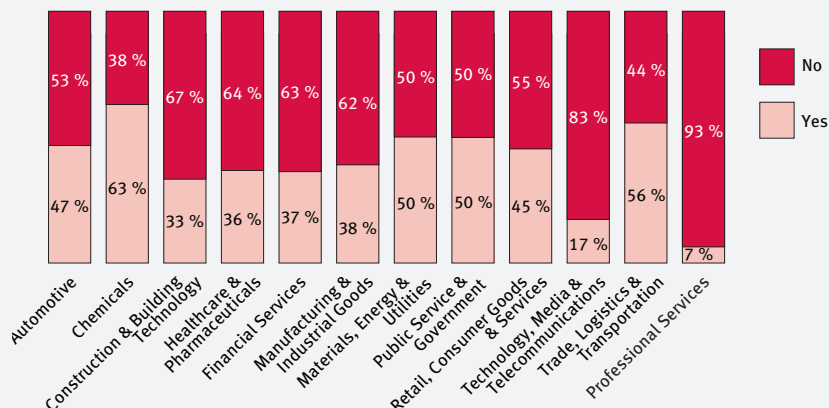
How many people in your organization have Market Intelligence as their primary job description?



³ The industry group Tourism and Leisure was left out from most of the comparisons because of the lack of statistically significant data.

Many companies in “Chemicals”, “Trade, Logistics and Transportation” plan on setting up Market Intelligence operations

Graph 15
Are you planning on launching systematic Market Intelligence operations?

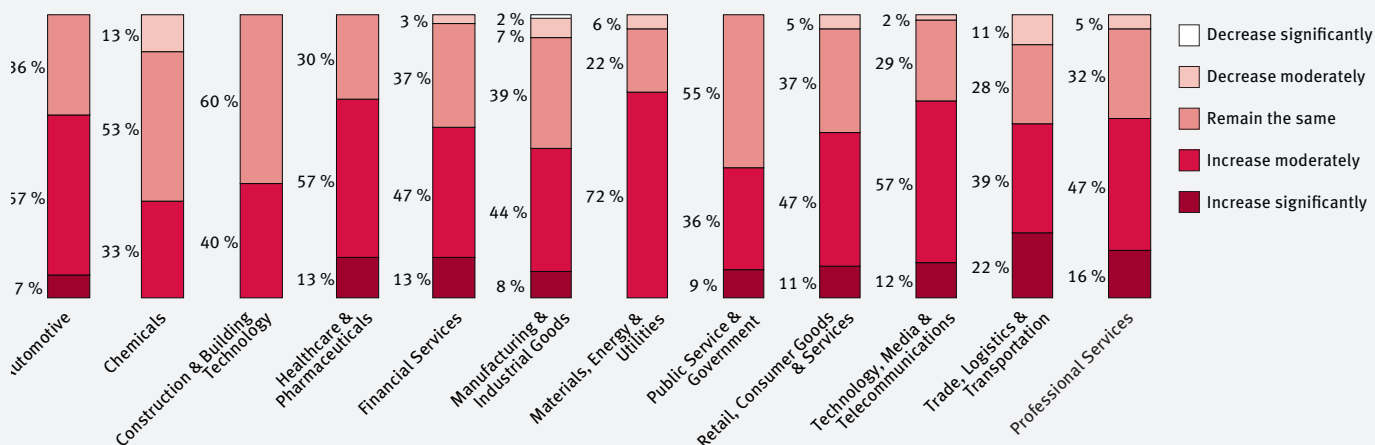


Of the companies currently without an MI operation, chemicals, trade, logistics and transportation industry companies are the most eager to launch one. What is common to these industries is that they are highly dependent on the developments of their customer industries, and the value chains in these industries are also evolving rapidly. Small wonder therefore that companies in these industries need to improve their understanding about their business drivers, and the need for high quality Market Intelligence has been recognized.

“Healthcare” and “Materials, Energy and Utilities” the heaviest investors in Market Intelligence in the next two years

The healthcare, materials, energy and utilities sectors in turn will invest the heaviest in MI in the next two years. Here, long term economic trends and strategic themes drive the development: All of these industries are heavily impacted by such megatrends as increasing environmental concerns and the aging of population. Of course in an economic downturn further investments also tend to concentrate on industries that are less dependent on short term business cycles than others.

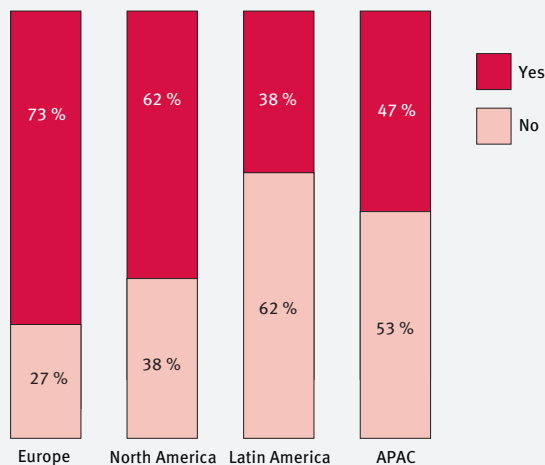
Graph 16
How do you anticipate the investment in Market Intelligence in your company to develop over the next two years?



Europe and North America lead the way in Market Intelligence, Latin America to increase Market Intelligence efforts most in the next two years

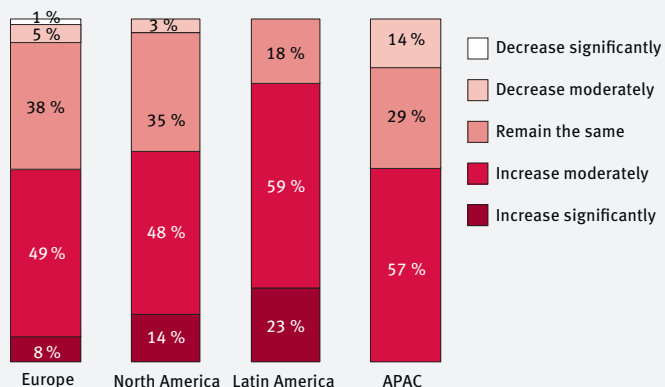
Graph 17

Does your company have systematic Market Intelligence operations in place?



Graph 18

How do you anticipate the investment in Market Intelligence in your company to develop over the next two years?



If differences are evident in the Market Intelligence traditions and future plans across industries, analyzing the research data from a regional perspective reveals even more significant contrasts. As was expected at the onset of the survey, Europe and North America have progressed furthest in the field of MI, with especially Latin America being anxious to catch up.

Judging by the open responses to the survey, the main bottleneck on the development path is limited support from top management and the directly related lack of available budget. If the Latin American companies want to catch up with their peers in the rest of the world, a solid process development framework will be helpful in generating the vision for a professional Market Intelligence operation and setting the milestones along the way towards that vision. The framework will ensure a step by step development approach and provide an opportunity for management to evaluate results - and benefits - after each step.

FUTURE OF MARKET INTELLIGENCE

Global Intelligence Alliance has developed a six-dimensional Market Intelligence development framework that builds on the key success factors of the Market Intelligence operation. The six key success factors included in the framework are defined as follows:

- **Process:** Systematic process by which MI ties in with decision-making
- **Organization:** The internal and external resources that form an intelligence operation
- **Scope:** The focus topics and organizational spread of the intelligence operation
- **Culture:** The shared understanding of the importance of Market Intelligence, practical activities built around this understanding
- **Tools:** Software and other tools to store and share Market Intelligence
- **Deliverables:** Market Intelligence output

By the above key success factors, companies will be able to measure their performance against their own Market Intelligence vision and objectives on the one hand and global best practices on the other.

Key Success Factors of Market Intelligence operations at “Intermediate” level on average

In this survey, the above described MI development framework was used when asking the respondents to evaluate their own company’s current state of MI development. Most of the researched companies turned out to already have relatively sophisticated MI operations, with all key success factors averaging at “intermediate” or “advanced” levels. The result was expected, given the average age of the MI operations of approximately 7 years.

Graph 19

How far have the dimensions of your company’s Market Intelligence operations progressed?

	Informal MI “Firefighters”	Basic MI “Beginners”	Intermediate MI “Coordinators”	Advanced MI “Managers”	Worldclass MI “Futurists”
Process	1,88 %	20,19 %	37,09 %	38,50 %	2,35 %
Organization	1,89 %	24,53 %	33,49 %	33,96 %	6,13 %
Scope	1,88 %	15,49 %	34,74 %	40,38 %	7,51 %
Culture	5,69 %	25,12 %	31,75 %	32,23 %	5,21 %
Tools	1,88 %	20,19 %	37,09 %	34,27 %	6,57 %
Deliverables	2,36 %	15,09 %	33,02 %	43,40 %	6,13 %

< 10 %
10 – 30 %
> 30 %

Strongest confidence in Scope and Deliverables of Market Intelligence

The respondents were particularly confident with the scope and deliverables of their MI operation. This is logical, firstly because MI practitioners are generally confident that they know what kind of intelligence is important to collect for their organization, and secondly because formatting the output is regarded as the easiest task in the MI operation. Also, of the six key success factors, Scope and Deliverables are at the tangible end of the group.

Culture is the most difficult KSF of Market Intelligence to master

Moving to the intangible end of the MI success factors, MI culture presents itself as by far the most difficult dimension to master, judged by the perception of the respondents. Even if all Market Intelligence output is firmly integrated to decision-making, it does not automatically mean that a “culture for MI excellence” exists in the company. Typically it takes years for an organization to adopt operational models that turn into what can be called cultures, and Market Intelligence is no exception.

Yet the respondents are confident that they are heading towards the right direction: When asked about their vision for the future in Market Intelligence development, nearly all respondents saw their MI operation moving towards further sophistication.

The amount of companies in the “advanced” and “world class” groups is anticipated to grow significantly over the next two years, and MI culture is one of the areas where positive developments are expected. That said, not very many respondents dare to bet on a “world class MI culture” in their own organization in two years’ time. Considering how many respondents throughout the survey brought up the critical role of top management support (and often complained about the lack of it), perhaps the single most efficient booster for world class MI culture would come from the CEO giving his/her public blessing to top notch Market Intelligence efforts in the organization.

Graph 20

How far have the dimensions of your company’s Market Intelligence operations progressed?

	Informal MI “Firefighters”	Basic MI “Beginners”	Intermediate MI “Coordinators”	Advanced MI “Managers”	Worldclass MI “Futurists”
Process	0,72 %	5,43 %	27,54 %	53,62 %	12,68 %
Organization	0,73 %	8,00 %	29,82 %	49,09 %	12,36 %
Scope	1,09 %	5,07 %	26,45 %	51,09 %	16,30 %
Culture	1,10 %	9,16 %	27,11 %	47,99 %	14,65 %
Tools	0,36 %	6,52 %	25,36 %	49,28 %	18,48 %
Deliverables	0,73 %	5,49 %	23,81 %	47,99 %	21,98 %

< 10 %
10 – 30 %
> 30 %

Graph 21

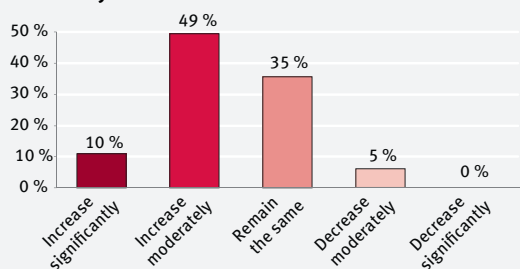
How far have the dimensions of your company’s Market Intelligence operations progressed?

	Informal MI “Firefighters”	Basic MI “Beginners”	Intermediate MI “Coordinators”	Advanced MI “Managers”	Worldclass MI “Futurists”
Process	-1,15 %	-14,75 %	-9,55 %	15,13 %	10,33 %
Organization	-1,16 %	-16,53 %	-3,67 %	15,13 %	6,23 %
Scope	-0,79 %	-10,42 %	-8,29 %	10,71 %	8,79 %
Culture	-4,59 %	-15,96 %	-4,65 %	15,76 %	9,44 %
Tools	-1,52 %	-13,67 %	-11,73 %	15,00 %	11,91 %
Deliverables	-1,63 %	-9,60 %	-9,21 %	4,59 %	15,85 %

Decrease
Increase

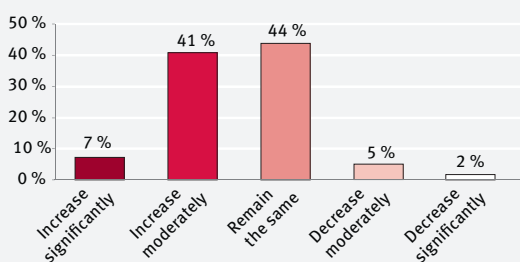
Graph 22

How do you anticipate the investment in Market Intelligence in your company to develop over the next two years?



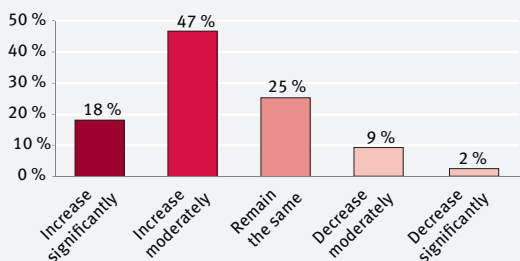
Graph 23

How do you expect the outsourcing of Market Intelligence research work to develop in the next two years?



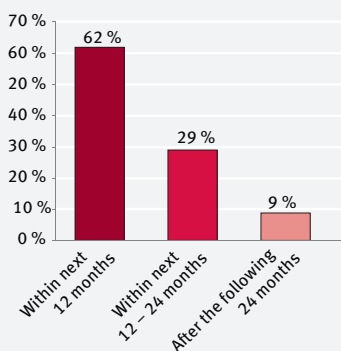
Graph 24

How do you see that the need for sophisticated Market Intelligence activities will change during a downturn in global economy?



Graph 25

When are you planning on launching systematic Market Intelligence operations?



Heavy investments expected in Market Intelligence over the next 2 years

The anticipated improvements in the sophistication of MI are going to be achieved at least by increasing investments, the survey results suggest. 60 percent of the respondents believe that their companies will increase investments in Market Intelligence, while only 5 percent anticipated decreases in the area.

Outsourcing of Market Intelligence growing rapidly

Outsourcing is seen as a viable option in MI in the future. Nearly 50 percent of the participants in this study expect that the efficiency and quality of their MI operation will be improved in the future by outsourcing parts of the process to external partner companies. Only 5 percent of the respondent anticipated that their organizations will be moving to the opposite direction, i.e. bringing more of the MI work back in-house.

Increasing need for Market Intelligence during weakening global economy

Reflecting the current economic sentiments of uncertainty and recession, the survey also addressed the respondent's expectations about how these will influence Market Intelligence needs in their companies.

Considering that weakening economy will limit the availability of profitable business choices, the need for accurate and targeted Market Intelligence about the operating environment will increase. How to find new opportunities while avoiding threats?

Indeed nearly 75 percent of the respondents saw the need for MI to increase during a global economic downturn, whereas merely 10 percent felt that MI would decrease in the order of importance. Hence the challenge is to balance the MI efforts and their cost carefully. Justifying the above anticipated budget increases in particular will require highly targeted Market Intelligence that ties in to decision-making processes on a very concrete level, that way demonstrating tangible business benefits.

Companies without a Market Intelligence operation are planning to launch one ASAP

Based on the findings of this survey, it is evident that companies still operating without organized Market Intelligence will find themselves at a disadvantage compared to their peers with a sophisticated MI operation. It is not surprising therefore that of the ones planning to launch their own MI operation, the majority will do so already within the next year.

CONCLUSIONS

Many companies already have lengthy traditions in MI (reflected in the age, resourcing and output of the operation), and the results can be seen from greater confidence in decision-making than in companies with little or no investment in MI.

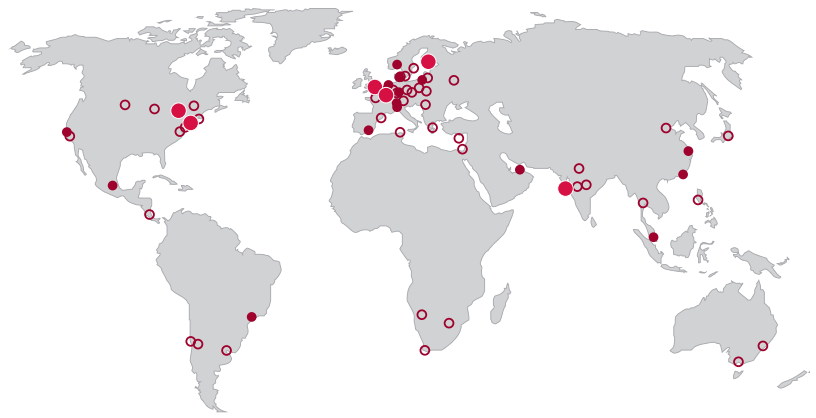
However, there is still room for improvement in virtually all companies that participated in this survey on the “impact of MI” front. One of the keys to improving this is to develop an intelligence culture – perceived by the respondents as the most challenging dimension in developing world class Market Intelligence operations.

Considering the anticipation by most respondents that the economic downturn will only increase the significance of MI, now is really the time to work on raising the status and concrete impact of high quality MI in organizations.

The above message is also strengthened by the fact that while most respondents saw the investments in MI to increase, along with outsourcing MI work, this may be challenging if budgets are constrained. Again, it is vital to make sure that any MI that is being conducted truly responds to the needs of decision-makers and helps them navigate through tougher times.

Using external MI services may be a good solution during economic downturn in the sense that purchased services will flex up and down, and it is relatively easy to measure and control both the investment in MI and the impact of it.

Overall, there are differences in the current level of MI maturity across regions and industries, but MI developments on the average are solidly on an upwards pointing curve. Gaining more support from top management still remains the challenge for many MI practitioners, however. There is only one recipe for tackling this challenge: Proving the value of Market Intelligence through processes and output that truly respond to decision-makers’ business information needs.



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