

Journal of Competitive Intelligence and Management

Special Issue *on Country-Specific Competitive Intelligence*

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Journal of Competitive Intelligence and Management

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

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Competitive Intelligence in Canada

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Executive Summary

This article reviews Canada's involvement in competitive intelligence (CI). In particular, it provides insights into how the Canadian CI infrastructure has evolved in terms of government initiatives, consultants, corporate practice, education and academic contributions. In a sense, this paper represents an attempt to begin an inventory of Canadian intelligence practice. The Canadian approach to growing competitive intelligence has been more a function of the work of key individuals at a regional level than that of a systematic national program for intelligence. As such, for the most part, this article focuses on the regional infrastructure for competitive intelligence. The paper is organized as follows. After the introduction, the second section

provides information on governments initiatives and CI. The third section presents data on consultants in CI. The fourth section discusses organizational practices. The fifth section provides information on academic contributions including an extensive Canadian CI bibliography. Concluding remarks are presented in the last section.

Key Words

competitive intelligence, environmental scanning, Canada

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Introduction

In 1989, Ian Gordon (a Canadian), published an easy-to-use guide on marketing intelligence. The book, complete with easy-to-fill-in forms, was one of the first of its kind in Canada, and represented one of the first formal Canadian forays into competitive intelligence. Today, competitive intelligence programs can be found in Canada from coast to coast, consultants abound, and there has been a plethora of academic articles and studies written on this subject. The Society of Competitive Intelligence Professionals (SCIP) boasts 172 members in Canada as of November 2003 - 55% corporate, 13% small consultants, 6% large consulting firms, 13% government, and 6% academic.

The objective of this article is to look at Canada's involvement in competitive intelligence. In particular, how the infrastructure has evolved in terms of academic contribution, education, consulting, and corporate practice. In a sense, this article represents an attempt to begin an inventory of Canadian intelligence

practice. As this is the first attempt of this project, there will undoubtedly be omissions. The authors apologize in advance for any missing information and should readers be aware of contributions that should be part of this inventory project, please let the authors know so that subsequent versions of this article can be more thorough.

The Canadian approach to growing competitive intelligence has been more a function of the work of key individuals at a regional level than that of a systematic national program for intelligence. As such, for the most part, this article will focus on the regional infrastructure for competitive intelligence.

The article is organized as follows. After the introduction, the second section provides information on governments initiatives and CI. The third section presents data on consultants in CI. The fourth section discusses organizational practices. The fifth section provides information on academic contribution. Concluding remarks are presented in the last section.

Governments and Competitive Intelligence

Federal Level

With a strong federal infrastructure, it is natural to assume that in Canada there should be a strong national program for competitive intelligence and to a certain extent this has been true. In 1992, at the request of a Parliamentary sub-committee, several key economic ministries were asked to improve the information products offered to their clients. The result, was a training program created in market information and intelligence, a classic introduction to competitive intelligence program. This program was offered to embassy personnel around the world and to federal government staff across Canada who had economic and business reporting responsibility. In several of these provinces, local federal government officers in turn started developing intelligence programs for their province. These typically included training initiatives offered locally, the development of intelligence awareness materials, and, in some cases, the commissioning of intelligence projects. Typically, within a month of the commencement of these initiatives, a SCIP chapter would be

formed. The departments principally responsible for these initiatives were Industry Canada, Agriculture Canada and Department of Foreign Affairs.

Beyond the initial round of training, however, there was no central coordination of intelligence initiatives; rather, each province was left to adapt intelligence programs as they saw fit. For example, in Manitoba, British Columbia and on the East coast of Canada, Agriculture Canada brought intelligence training to companies; in Quebec, Industry Canada contracted the development of an intelligence web site on Strategis (Industry Canada's web site). In British Columbia, training was offered to Industry Canada staff while in Alberta, Industry Canada had the course given to provincial economic departments (Economic Development and Agriculture and Food). This in turn led to the development of a provincial training initiative and joint federal-provincial intelligence initiatives (these are described in great detail in SCIP literature).

Agriculture Canada recently experimented with a trade show intelligence program, offering training to staff and companies attending the following trade shows: SIAL 2003, Foodex 2003, ABIC 2003, Fancy Food Show 2003, and BIO2002.

At the same time, the National Research Council (NRC) was also taking an active interest in competitive intelligence. Significant training arose in Ottawa with the Canadian Institute for Scientific and Technology Information (CISTI) which in turn brought the concept to various parts of the National Research Council - most notably the Canadian Technology Network (CTN) and the Industrial Research Assistance Program (IRAP). The NRC commissioned the first ever survey of Canadian Technology company intelligence practices in 1996 and used the CTN infrastructure to coordinate roundtables on the survey results. Each region of the National Research Council then undertook local initiatives, again, with little central coordination.

The result of regional initiatives was that in British Columbia, the National Research Council helped to create the Canadian Institute for Market Intelligence (CIMI); and a Manitoba Institute called the Prairie Centre for Business Intelligence established with NRC assistance and housed at the University of Manitoba serving Manitoba and Saskatchewan.

Established by NRC, CIMI was incorporated in 1998 as an initiative of the National Research Council's

Industrial Research Assistance Program (NRC-IRAP). The Institute's staff work side-by-side with Industrial Technology Advisors (ITAs) in delivering IRAP. CIMI was set up to provide British Columbia companies with key information products and assist regional NRC officers in the conduct of technology assessments. Specifically, CIMI's objectives are:

- Improve the IRAP clients' understanding of markets and business development requirements as they advance their technology toward commercialization.
- Increase the competitiveness of small and medium-sized enterprises (SMEs).
- Expand the reach of Canadian SMEs to international markets.

The Prairie institute was set up to conduct intelligence projects for Manitoba and Saskatchewan companies. In Alberta, the NRC experimented with training designed to help their officers mentor Alberta companies in competitive intelligence. In Ontario and Quebec, the NRC has sponsored several competitive intelligence workshops geared mainly towards industry.

What is evident from the approaches of the National Research Council, Agriculture Canada, and Industry Canada is that there is significant regional variation in the role of the Canadian federal government in competitive intelligence.

Provincial Level

At a provincial level, significant differences could also be seen in programming. No initiative was evident in British Columbia (except for CIMI which was a federal initiative). In Alberta, several provincial initiatives were developed. Under the Department of Agriculture, training was offered to companies and an intelligence unit was created. Alberta Economic Development offered training to its employees and then using matching funding provided by a Federal program delivered project intelligence and trade show intelligence training and assistance to Alberta companies. Under the Heritage Program, Alberta Economic Development is coordinating a program with Alberta colleges to develop a provincial intelligence training program. The Alberta initiative at the provincial government level can best be described as project work and

company training. These initiatives recently received provincial awards recognizing them for their success and excellence in helping companies develop intelligence capabilities.

In Saskatchewan, STEP (Saskatchewan Trade and Export Program) has in the past few years developed an intelligence department. The role of the department is to produce market intelligence for STEP members (STEP is a quasi government organization that assists companies in their international activities). In 2002, Competia gave the STEP CI unit an award, recognizing it's excellence. This shows not only an interesting provincial government initiative but an example of a well-run intelligence unit. STEP has also been instrumental in providing training to Saskatchewan companies but this has been a very small part of their role in intelligence.

Manitoba is a relative newcomer to provincial based intelligence initiatives and while there has been talk at the provincial level about intelligence training and project work, nothing has been formalized. However, there was one initiative sponsored jointly by the federal government and the provincial government that provided intelligence training to economic development officers from small Manitoba communities.

In Ontario, two ministries have offered training to employees. The Economic Ministry, Economic Development and Tourism Ministry also offered seminars to businesses and is attempting to get various industry groups interested in intelligence. However, there is no specific program geared towards intelligence.

When the 1999 Society of Competitive Intelligence Practitioners (SCIP) annual conference was held in Montreal Quebec, members were told by a senior politician about the impressive provincial business intelligence infrastructure. The Quebec provincial government adopted a program called Fonds de partenariat sectoriel volet 4: Veilles concurrentielles (FPS4), (which funded the creation of fourteen Centres de veille concurrentielle (CVC) (CI centres). The program lasted 5 years (1994-1999). The CVC support the practice of CI in entreprises, mainly small-and-medium size entities (SME). Industrial clusters covered by the CVC include plastics, chemistry, metallurgy, environment, construction, communications, fashion and textile, information technology, among others.

Specifically, CVC's objectives are to:

- Bring together the expertise of key players in a given industrial sector to ensure a concerted effort in the area.
- Give to enterprises in an industrial sector access to information and services to help them to increase their competitiveness and growth and to support their strategic decision-making.
- Propose a proactive approach to encourage and facilitate the use of operational and strategic information by industrial sector enterprises, to stimulate project developments and reduce their uncertainty.
- Help enterprises to develop their own CI capacity and integrate it into their regular activities.

The CVC program suffered from lack of awareness and was over-optimistic on the self-financing capabilities of the CVC after three 3 years. At this time, only a handful of CVC are still relatively active in their industrial sector. Nonetheless, the CVC certainly contributes to increase the awareness of CI in Quebec.

In another project, *Projet de veille intégrée sur les politiques publiques* (government-wide environmental scanning of public policies), each Quebec ministry had an officer responsible for competitive intelligence. This officer in turn reported to a central government business intelligence committee.

Nova Scotia (one of Canada's eastern provinces) has recently introduced programming in competitive intelligence. Nova Scotia Business Inc., (NSBI) a provincial agency responsible for economic development used business intelligence as a major pillar in their business plan. Within the past two years, NSBI has run educational programs for government employees and companies similar to those created in Alberta. In addition, with the assistance of the Atlantic Canada Opportunity Agency (ACOA), NSBI has started a trade show intelligence program for companies.

Consultants and Competitive Intelligence

Canadian consultants in competitive intelligence, while not being numerous, have certainly made their mark on the international intelligence consulting scene.

Based in Canada, Competia claims to be the world's premier portal for competitive intelligence. They are an integrated company offering conferences, training, publishing, and consulting. Competia also has a chapter structure called circles of which there are currently 7 (three in Canada, two in the United States, one in London, UK and one in India).

There are two other consulting firms in Canada with significant size and international scope - IBIS with offices in Ottawa and Vancouver and EMR based in Calgary Alberta. Both of these companies have successfully led client projects in both public and private sectors throughout North America.

There are a host of other consultants in the intelligence field, several of whom have developed significant reputations for their practice. For example in Toronto, David Lithwick from Market Alert has written extensively about competitive intelligence and has been very involved in marketing intelligence. David Gibson, founder and chair of SCIP Toronto, teaches a York University executive seminar on competitive intelligence and was a founding partner of Gibson Kennedy & Company, a Toronto based consulting firm specializing in competitive research and strategy development. Gibson Kennedy & Company is the exclusive authorized correspondent for Kaiser Associates, Inc. in Canada. Jonathan Calof and Craig Fleisher have also established extensive international consulting practices in competitive intelligence. Both are professors in Ontario universities who work with international companies and governments in offering training in intelligence, organizational capability development, and project assistance. Dr. Fleisher is best known for his work in intelligence analysis, co-authoring a best selling book on the topic. Dr. Calof is known for his work with governments, and the development of trade show intelligence programs.

Quebec could count on a handful number of relatively small size CI consulting firms. Among others, we could mention Richard Legendre, founder and chair of SCIP Québec, Service d'information industrielle du Québec inc. and Robert Lacas, DsciD Inc. Even if the Centre de Recherche Industrielle du Québec (CRIQ) downsized most of his CI consulting activities, they are still relatively active in providing services and CRIQ continues to sell its CI software, VIGIPRO.

The development of intelligence consultancies in

Canada is very similar to that seen in other countries. For the most part, initial development arose from government officers from the intelligence community who retired from the Canadian intelligence establishment and brought their techniques to industry. Academic and marketing personnel have also been involved in the effort. In terms of the big 4 consultant firms, all Canadian firms have formally gone into competitive intelligence at some point in time - Deloitte & Touche, Ernst & Young, KPMG and PricewaterhouseCoopers.

Organizational Practices

Organizational practices could be divided between companies and non-profit entities. When the government intelligence initiatives were undertaken in Canada in 1992, few firms had active intelligence programs. In fact, when a talk was given on intelligence in 1994 to the largest technology companies in Canada, the response of the attending executives to competitive intelligence was very negative with comments such as "Why would I want to know what my competitors are up to?" dominating the discussion. However, the survey of Canadian company capability (Calof & Breakspear, 1996) revealed that while few programs had formal intelligence capabilities many did conduct activities consistent with low level intelligence activities. Nortel was frequently used at that point as an example of a company with a top level intelligence program. Nortel had a central intelligence unit, conducted regular training for employees interested in intelligence and created an intelligence guild, a club of sorts where company employees could take part in intelligence initiatives.

Today, many Canadian companies have intelligence units. It has become common in the banking industry, within high technology companies, mining companies, and pharmaceutical firms. There has been a significant evolution in the practice of competitive intelligence in Canadian companies. The extent of this will be examined in an upcoming competitive intelligence study.

Non-profit entities are also active with CI activities. Examples could include museums, (Observatoire des musées du Québec, Musée d'Art Contemporain de Montréal), public administration (Observatoire de l'administration publique), geomatics (Centre de développement de la géomatique), economic development

(Observatoire de la technorégion Québec-Chaudières-Appalache-GATIQ). Some governmental agencies have set up their own CI unit like the Centre d'intelligence économique (Economic Intelligence Centre) of Investissement Québec.

Academic Contribution

The academic contribution of Canadians in CI is a story of selected individuals championing intelligence in their institutions rather than a coordinated academic program. Identifying Canadian academic contributions to competitive intelligence is perhaps more difficult a task than examining other aspects of the intelligence infrastructure. To identify research contribution, the authors conducted literature reviews using ABI inform/Proquest and Emerald databases and solicited input from leading Canadian intelligence researchers. The authors have sent an email to Canadian academic researchers to obtain a recent resume listing of their publications related to competitive intelligence and activities related to CI and a list of academics in Canada that they felt were involved in CI related research. Emails were sent both in English and in French. The list of publications received were completed by the CI bibliography of the authors.

The bibliography is organized by type of publication and by author. The categorization scheme uses five different publication types. We adopted a modified version of the classification used in Dishman, Fleisher and Knip (2003):

- Books and Doctoral Dissertations - This category is composed of full-length manuscripts that have International Standard Book Numbers (ISBN) and dissertations by Canadians.
- Scholarly Articles - This category is composed of articles that were written primarily for academic audiences. We distinguish between peer-reviewed journals and those journals which are not peer-reviewed. Only peer-reviewed journals are included into this category.
- Conferences - This category is composed of refereed academic proceedings and conferences in recognized academic conferences.

- Study - This category is composed of research reports without a specific ISBN.
- Professional and Other - This category is composed of writings that are primarily targeted at professional or practitioner readers and audiences. It could include major business magazines as well as writings in less popular industry and specialty publications. Journals which are not peer-reviewed are included into this category.

As mentioned in Dishman, Fleisher and Knip (2003), "in any comprehensive bibliographic effort such as the one that served to develop this listing, the authors must make important decisions about the items that are chosen for inclusion in the list, and those which are excluded". The following guidelines are used by the authors:

- Explicitly referred to "competitive intelligence", "business intelligence", "environmental scanning", "veille stratégique" or "veille".
- Related directly to the CI process cycle. Excluded were items that were not clearly focused on CI and management topics even though the general topic may have been related to the CI cycle (e.g. knowledge management).
- Were longer than two printed page or greater than 500 words to capture substantial items.
- Were included items with at least one Canadian author.

While academic programs can be found throughout Canada, principle research activities appear to be limited to the Atlantic Provinces, Quebec and Ontario. Research appears to be conducted by close to a dozen researchers, many of whom have taken active roles within the Society of Competitive Intelligence Professionals. In all, well over 100 publications were found from Canadian researchers from coast to coast. Authors come from business schools and information studies schools.

Atlantic Provinces

The principal researcher from this area is Connor Vibert from Acadia University. His research focuses primarily on the use of the Internet for intelligence and utilization of technology for teaching intelligence. While no specific training program in intelligence exists at Acadia, Professor Vibert has integrated intelligence within his courses. He has also taken an active role within SCIP, for example he is coordinating the SCIP 2004 Academic Conference. An integrated intelligence program did exist at the University of New Brunswick but a departure from that University appeared to have reduced the ability to deliver the program.

Quebec

This province has been very active in intelligence research. Several universities offer training in intelligence and have active intelligence research programs. Université Laval could count on Josée Audet, Gérald d'Amboise, and Raymond Poisson to look at CI practices of small and medium sized entities (SME). No specific training program in intelligence exists at Laval.

The Université du Québec à Trois-Rivières (UQTR) with researchers like Pierre-André Julien, Louis Raymond, and Réal Jacob (now at HEC Montréal) has published many studies regarding environmental scanning and technological intelligence of small and medium sized entities (SME).

Three doctoral students work on business intelligence and information gathering. François Brouard developed a diagnostic tool to evaluate intelligence capability of SMEs. Léonard Dumas looked at implementing marketing intelligence systems in hotel industry. Ivan Vaghely looked at how SMEs deal with weak signals and information processing. Some continuing education training sessions in intelligence exists at UQTR on demand. Pierrette Bergeron at the Information Studies department (École de bibliothéconomie et de sciences de l'information - EBSI) of the Université de Montréal is a prolific author in Canada. She has published on a variety of topics focusing on information resources management and governmental policy regarding CI in many countries. A Masters Degree level course (Veille stratégique) exists at EBSI since 1996. It is a required course in the Strategic Information Management op-

tion in the Master's Degree in Information Sciences. Her colleague Charles Ramangalahy is also interested in environmental scanning of SMEs. France Bouthillier at Graduate School of Library and Information Studies, McGill University works on technologies in CI. No specific training program in intelligence exists at McGill.

Ontario

Similar to Quebec, active training and research activities exist in Ontario both within business programs and information studies programs. At the University of Ottawa, Dr. Calof has for several years taught an MBA level course on competitive intelligence. This program is among the more popular options at the University. Dr. Calof has also conducted extensive research on competitive intelligence practices in Canada, United States, South Africa, and Germany. Dr. Calof also assisted in the opening of SCIP chapters in various parts of Canada, Mexico and South Africa and co-founded the Canadian Institute of Competitive Intelligence. He has given close to 500 talks on competitive intelligence around the world. His trade show intelligence program is currently being offered throughout Canada, South Africa, China and Ireland.

Also in Ottawa, at Carleton University, Francois Brouard has been active in competitive intelligence training and research activities. Although the Eric Sprott School of Business at Carleton University does not offer intelligence courses to their students, it has an executive level seminar offered as part of its executive development program on competitive intelligence. The course is available as either a one- or two-day course and is offered on an as requested basis.

Carleton University also houses the Canadian Centre of Intelligence and Security Studies (CCISS), an interdisciplinary research unit on Intelligence Studies, with a particular focus on Canada's experience and requirements. CCISS is Canada's first research centre dedicated specifically to Intelligence Studies. Its director, Professor Martin Rudner, is a member of the Norman Paterson School of International Affairs.

In Toronto, both the University of Toronto and York University have offered programs in competitive intelligence. The York program has been delivered to executives only by David Gibson while University

of Toronto offers an Internet-based competitive intelligence course. This seven week program is offered by the University's Faculty of Information Studies Continuing Education Program. It has open admission meaning that anyone can take the program and is offered online twice per year. Professors Choo from the Faculty of Information Studies University of Toronto has been a prolific writer in the area of environmental scanning. Ethel Auster, Anu MacIntosh-Murray and Christine Marton are other researchers from the Faculty of Information Studies, University of Toronto.

Wilfrid Laurier University in Waterloo, Ontario

has had intelligence research and training for several years. The program, initially coordinated by Professors Craig Fleisher and David Blenkhorn consists of a full term graduate level business course called Managing Competitive Intelligence. The program is offered once a year both in Waterloo and in Toronto to Wilfrid Laurier MBA students only. The University has also been an active center for intelligence research generating books and articles dealing with intelligence practice.

The University of Windsor in Windsor, Ontario also has an active program in competitive intelligence. Their involvement began over a year ago with the hiring

Table 1: Summary of Canadian Academic Contribution to Competitive Intelligence

Province	University	Course	Research
Newfoundland		No	No
Prince Edward Island		No	No
Nova Scotia	Acadia University	Yes - Integrated	Yes - Vibert
New Brunswick	University of New Brunswick	Yes - Integrated	No
Québec	Université Laval	No	Yes - Audet, D'Amboise, Poisson
	Université du Québec à Trois-Rivières		Yes - Julien, Raymond, Brouard, Dumas, Vaghely
	McGill University HEC Montréal	No No	Yes - Bouthillier, Shearer Yes - Jacob, Chokron
Ontario	University of Ottawa	Yes - 1.5 credit MBA	Yes - Calof
	Carleton University	Yes - Continuing ed.	Yes - Brouard
	University of Toronto	Yes - Continuing ed.	Yes - Choo, Auster, MacIntosh-Murray, Marton
	York University	Yes - Executive ed.	No
	Wilfrid Laurier University University of Windsor	Yes - 3 credit MBA Yes - 2 special seminars	Yes - Blenkhorn Yes - Fleisher
Manitoba		No	No, but Prairie Institute generates projects
Saskatchewan	University of Regina	No	Yes - Nkongolo-Bakenda
Alberta	University of Alberta	Yes - 2 seminars part of continuing education	No
British Columbia	British Columbia Institute for Technology	Yes - Continuing education	No
	Royal Roads University	Yes - Integrated in KM	Yes - Breakspear

of Professor Fleisher. He has introduced special topic MBA courses in competitive intelligence and executive development programs in competitive intelligence as well. Dr. Fleisher has played a pivotal role in competitive intelligence, as editor of the *Journal of Competitive Intelligence Management*, recent board member for the Society of Competitive Intelligence Professionals, and as a prolific writer and editor of intelligence anthologies. His more recent publication on strategic and competitive analysis with Babette Benoussan (2002) is among the best sellers in the competitive intelligence field and has led to an active global lecture program.

The Prairies

The authors are not aware of intelligence training or research in Manitoba or Saskatchewan, with one exception. At the University of Regina in Saskatchewan, a Université Laval alumnus, Jean-Marie Nkongolo-Bakenda is interested by environmental scanning in globally oriented SMEs.

Alberta is currently experimenting in a few colleges with the development of an introduction to competitive intelligence course but no formal research or training program has been developed. At the University of Alberta, two courses are being offered at the continuing education level, corresponding to an intro to competitive intelligence course and an intermediate level course on competitive intelligence. These programs are offered over three weekends and are taught by competitive intelligence consultants from the Calgary and Edmonton area.

British Columbia

Two intelligence training programs exist in British Columbia. The British Columbia Institute for Technology has a one day introduction to competitive intelligence course offered as part of its continuing education program. Royal Rhodes University has a program on knowledge management developed in part by Alan Breakspear from IBIS. Intelligence is introduced within the program as knowledge management topics and as a process which has overlap with knowledge management.

Table 1 provides a summary of Canadian academic contributions to competitive intelligence.

Conclusion

Canadian involvement in competitive intelligence has steadily increased over the past 10 years. Today, research output, course delivery, SCIP involvement, company practice and government involvement are growing. Canadians are taking significant leadership roles in competitive intelligence and are exporting this expertise around the world. However, these activities suffer from lack of coordination. Further, intelligence is still at its early stage and so there exists a need to increase the awareness of intelligence throughout the country.

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