

COMPETITIVE INTELLIGENCE: AN INSTRUMENT TO ENHANCE SOUTH AFRICA'S COMPETITIVENESS

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Abstract

The case for Competitive Intelligence (CI) as an instrument that can enhance the competitiveness of South African companies and South Africa as a country is strong. Various global competitive rankings measurements have indicated over a number of years the areas in which competitiveness is lacking. Moreover, these rankings have indicated that South Africa has failed to improve its position year on year. The fact that the world is becoming increasingly competitive for South African entities is undisputed. Coupled with a fluctuating exchange rate and the country's geographical proximity, this poses unique challenges facing South African managers who have to deal with various regulations and legislative matters. In order to create and sustain an effective knowledge economy and to enhance global competitiveness, South Africa however has to put appropriate strategies/measures in place to stimulate, encourage and grow knowledge practices. Competitive Intelligence (CI) as a means of making more sense of the competitive business environment and to identify opportunities and risks in time to act upon can be effectively used as a means to enhance competitiveness. Valuable lessons from successful CI practices in the business sector and government can be learnt from elsewhere in the world. CI should be investigated and adapted for South Africa's business environment. It is therefore the aim of this article to first attempt to describe the role of CI in enhancing competitiveness, specifically in South Africa and secondly, to stimulate thought on how to secure momentum in enhancing CI as an academic field by developing relevant CI courses as well as demonstrating the value of CI to companies in South Africa through research and collaboration between academics and the private and public sectors.

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1 Introduction

Competitive Intelligence (CI) is a means to create actionable knowledge necessary for companies and institutions to create competitive knowledge about their business environment, build and sustain a competitive advantage and enhance global competitiveness (SCIP, 2004). Competitiveness could be defined

as the ability of a country or a company to generate more wealth than its competitors in world markets (Dolegowski, 2003). The World Competitiveness Yearbook (IMD, 2004) states that competitiveness is the ability to create added value and thus increase wealth by managing assets and processes, attractiveness and aggressiveness, globality and proximity, and by integrating these relationships into an economic and social plan. The US President's Commission on Industrial Competitiveness

defined it as “the degree to which a nation can, under free and fair market conditions, produce goods and services that will meet the test of international markets, while simultaneously maintaining or expanding the real income of its citizens (Travers, 2001). It is also about the ability of countries and companies to compete successfully internationally and to achieve sustainable development (AcademicDB, 2004).

The need to enhance companies’ and by extension, countries’ competitiveness has grown rapidly. With the globalisation of markets, emergence of new technologies, price wars, the continuous emergence of new, unfamiliar competition, demanding customers and with the ever-increasing speed of business and constant pressure to innovate and differentiate, it is no coincidence that CI is growing worldwide, also in South Africa (Viviers, Saayman, Calof & Muller, 2002).

The global economy is increasingly characterised as a knowledge and innovation economy where knowledge and innovation are the new currencies. There is an overload of information, the Internet has made information accessible to most and companies have come to rely on making better use of information to create and sustain a competitive edge. How to differentiate one company from the next is the ongoing challenge (Fleisher & Bensoussan, 2002).

The conversion of knowledge to intelligence and action is the critical task underlying CI process. This conversion requires competence and is enhanced by knowledge of the company and its competitive environment, knowledge of competitive drivers in a particular industry and knowledge of what would lead to competitive advantage (Herring, 1996). Knowledge, and its application, is acknowledged to be amongst the key sources and drivers of growth and development in the global economy. In today’s competitive global business environment, companies need the skill to translate indicators in the competitive environment into business opportunities. This also requires the skill to apply the intelligence in decision-making and develop competitive strategies (Porter, 1996). It is therefore the aim of this article to first

attempt to describe the role of CI in enhancing competitiveness, specifically in South Africa and secondly, to stimulate thought on how to secure momentum in enhancing CI as an academic field by developing relevant CI courses as well as demonstrating the value of CI to companies in South Africa through research and collaboration between academics and the private and public sectors.

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The role of CI in enhancing competitiveness

CI is a crucial and integral part of the emerging knowledge economy. By analysing and interpreting the macro environment, CI enables companies to anticipate and plan to exploit market developments rather than merely react to them. It is therefore an important tool for creating competitive advantage and enhancing competitiveness and is decisive in determining whether an entity (company, country, organisation, region) will be a market leader or follower (SCIP, 2004).

2.1 South Africa’s competitiveness rankings

A strong case can be made for CI as an instrument to enhance the competitiveness and by extension, the innovation capability of South African companies, organisations and institutions and South Africa as a whole.

South Africa does not seem to be able to improve on its global competitiveness rankings. In the latest Global Competitiveness Report 2004 – 2005, released by the World Economic Forum (WEF, 2005), South Africa was placed 41st out of 102 economies on the Growth Competitiveness Index (GCI). South Africa slightly improved on its 2003/2004 ranking of 42nd out of 102 economies. The GCI is one of two indices used by the WEF measuring a country’s national competitiveness in terms of macroeconomic environment, the equality of public institution, i.e. institutional capacity and technological progress. Finland was first for the second consecutive year, the US second position, followed by Sweden, Taiwan,

Denmark and Norway, consecutively. In the African rankings (2004) of the WEF, South Africa was third in the GCI at 42nd place overall after Botswana (achieving 36th place overall) and Tunisia (achieving 38th place overall) (WEF, 2005).

South Africa was ranked higher in the other WEF index i.e. the Business Competitiveness Index (BCI). The BCI is developed on the basis that a country's productivity depends equally on micro factors like basic infrastructures (telecoms, transportation, power and water supply) developed banking system, skilled manpower, vocational training, more effective governmental support for the private sector, better information/technological base and fair competition. South Africa is ranked 25th in the BCI (WEF, 2005).

Another competitiveness index, the Heritage Foundation's 2005 Index of Economic Freedom (which measures 161 countries against a list of 50 independent variables) placed South Africa 56th with an aggregate score of 2.78. These 50 variables are grouped into the following categories: trade policy, fiscal burden of government, government intervention in the economy, monetary policy, capital flows and foreign investment, banking and finance, wages and prices, property rights, regulation, and informal market activity (Heritage Foundation, 2005).

South African does not seem to be able to significantly improve its position having scored 2.78 in 2004 and 2.58 in 2003. In Africa, only Botswana (37th place, scoring 2.44) and Madagascar (48th place scoring 2.68) achieved better results than South Africa (Heritage Foundation, 2005). The Index of Economic Freedom is a theoretical analysis of the factors that most influence the institutional setting of economic growth. The countries with the most economic freedom also have higher rates of long-term economic growth and are more prosperous than those with less economic freedom. The economic freedom categories used by the Heritage Foundation are 'free' (scores between 1 and 1.99), 'mostly free' (scores between 2 and 2.99), 'mostly unfree' (scores between 3 and 3.99) and 'repressed' (scores between 4 and 5.)

With the afore mentioned as background, CI as a business discipline, could form an integral part of efforts to enhance the competitive behaviour of South African companies and society as a whole.

2.2 What is CI and how can it improve competitiveness?

CI is the process of enhancing marketplace competitiveness through a greater understanding of a company's competitors and the competitive environment (SCIP, 2004). With the advent of globalization, identifying new markets, lowering production costs and increasing productivity are not enough for an enterprise to prosper and grow in the new global economy. Monitoring industry and market trends, assessing the impact of political and economic changes, collecting information on competitors and knowing your company's strengths and weaknesses are all essential ingredients of a successful CI capability.

The CI process is the systematic continuous and focused process of acquiring, analysing, and evaluating information process involving the legal and ethical collection of information, analysis that does not avoid unwelcome conclusions, and targeted dissemination of actionable intelligence to decision makers. CI is more than just a process. It is also a product or the end result. CI as a product is actionable information that can be used to take specific strategic or tactical actions (e.g. launching a new product or entering a new market).

CI is also concerned with the methods companies use to monitor their competitors, their own competitive position, and to improve their competitiveness. CI provides actionable and reliable input to decision-makers when they are making tactical or strategic decisions (SCIPAUST, 2004). Many companies use CI to take market share from known competitors. A more productive use is to use it to help formulate long-term, competitive strategies (Graef, 1993). Calof defines CI as "actionable recommendations arising from a systematic process involving planning, gathering, analysing and disseminating information on the external environment for opportunities or developments

that have the potential to affect a company's competitive situation" (Calof, 1998).

CI is more than just information about competitors that is sometimes referred to more narrowly as competitor intelligence (sometimes market intelligence). Competitive intelligence is concerned with the organisation's ability to compete, especially in the context of its immediate competitors, but also more generally in the context of innovation, its people, its ability to remain ahead of the competition and in terms of market image and brand. Sometimes the term Business Intelligence is used to specifically refer to the more general competitive context, which includes such things as stakeholders (shareholders, community groups etc), regulations etc.

SCIP (2004) further describes CI as an instrument that enables senior managers in companies of all sizes "to make informed decisions about everything from marketing, R&D, and investing tactics to long-term business strategies." CI typically provides insight into who is winning market share and why; the competitive strategies of competitors; developing the right products for the changing market and customer preferences, market and brand image and a competitive culture that can enhance innovation and ultimately competitiveness.

3 CI status

3.1 Globally

CI is not an activity limited to a few countries or companies in certain industries; it is a worldwide phenomenon. Most of the Fortune 500 companies use CI extensively (Calof, 1998). Literature shows some countries, including France, Japan, Sweden and the USA, to be more advanced in their embracement of CI as a means to enhance competitiveness (Kahaner, 1997). In these countries, CI is a recognised business discipline and has become a major source to achieve competitive advantage. They are also developed in terms of the role government plays in supporting and advancing CI activities.

Another indicator of CI as a growing practice worldwide is the development of the Society of Competitive Intelligence Professionals (SCIP). Globally, SCIP chapters have taken root in all continents. The SCIP Annual Conference in the USA and Europe annually attract knowledge and intelligence managers and academics from all over the globe. Moreover, SCIP Europe, SCIP Italia, SCIP Australia, SCIP China and SCIP Deutschland are part of a growing worldwide network of SCIP affiliates, i.e. independent organisations that have formally affiliated with SCIP.

With the growth of CI in the business environment, the education and training needs have grown. Leaders in the field of CI education are France, Japan, Israel, Sweden, and Korea while Europe is beginning to appreciate the importance of CI as an instrument to enhance competitiveness. Some practitioners suggest that in the near future, all MBA programmes in Europe will include CI as a core subject area and that the investment community will be looking at companies' track record in terms of CI (Blagg, 2002). Prominent formal education programmes in CI include the following: a course in CI for global business at the Macquarie University: Graduate School of Management, Sydney, Australia, a masters programme in CI at the University Aix-Marseille, France and a PhD in CI at the Lund University, Sweden (SCIP, 2004).

3.2 CI in Africa

Limited research has been conducted or published on CI practices in African countries. The case for CI as a means to enhance competitiveness in Africa is strong especially in light of the fact that the IMD, in its latest competitiveness study, states that regions, and not countries, are the new players (IMD, 2004). Regional economies were included in the 2004 IMD World Competitiveness Yearbook rankings since they show pockets of competitiveness with different profiles than countries e.g. Bavaria, Catalonia, Ile de France, Lombardy, Mahasahtra, Rhône-Alps, Scotland, the state of Sao Paolo and Zhejiang in China.

The state of CI remains fragmented for

Southern African decision makers who need reliable information to deploy innovative policies for economic development in the sub region and for providing impetus to the continent's New Partnership for African Development (NEPAD). NEPAD is an undertaking by African leaders that they have a duty to eradicate poverty and to place their countries, both individually and collectively, on a path of sustainable growth and development, and at the same time to participate actively in the global economy (NEPAD, 2004). For Southern African decision-makers who need reliable information to deploy innovative policies for economic development in the sub-region and for providing impetus to the continent's NEPAD, the state of CI remains fragmented. However in South Africa, CI has become a topical issue in the beginning of the 1990s.

3.3 CI in SA

In South Africa, there is a clear distinction between competitiveness pre and post the political change that occurred in April 1994 and the country's re-entry into the international marketplace. The significance of that change is notable when examining the development of CI as a strategic business tool in South Africa. Before 1994, South Africa was economically, politically and socially isolated from the rest of the world. A wide range of sanctions and exchange control regulations and a generally inward-looking culture were in place that inhibited the growth of international trade in South Africa (Calof & Viviers, 1995: 72-73). Coupled with that was the withdrawal from South Africa of a significant number of multinational companies as a means of protest or forced by pressure. Local companies developed a warped sense of competition (becoming "locally competitive") as there were many protectionist measures in place. Furthermore, the economy was highly regulated. South African exporters e.g. had to devise creative means to get their products on the global market, often resorting to illegal sanction busting measures.

Within a short period of time after the April

1994 elections, the international market became more accessible for South African products. The full force of internationalisation and globalisation severely hit South African companies that were ill prepared for global competition. It is perhaps not surprising that this was the time that CI started growing in significance as an instrument tool companies started to use to become more competitive.

SCIP was launched in South Africa in the mid 1990's and albeit slowly, companies became increasingly competitively minded. Limited growth in CI was noticeable until the beginning of this century when growth became evident. In the late 1990's, CI consultancies started growing in stature and number and this growth coincided with the emergence of complementary management instruments including Knowledge Management, Total Quality Management and the Balanced Scorecard. CI gradually shed its initial negative perceptions as being an unethical and illegal activity and the business community started embracing it as a legitimate and necessary strategic business discipline.

Until that time, research into CI in South Africa had also been limited. The first comprehensive research projects were launched in the beginning of the century. Before that, only a few papers were written on CI (Viviers & Muller, 2004).

By 2004, CI became part of many companies across all industries. The benefits of CI became evident as the intensity of competitiveness and the pressure on strategic decision makers to make accurate business decisions fast, increased.

3.3.1 CI in South African companies

By 2001, when the first in-depth research into CI practices was conducted, CI was still in its infancy (Calof & Viviers, 2001: 63). The first empirically research project resulted from a need to assess the way in which South African companies conduct CI and this led to the first in-depth project in 2001 led by Viviers. The aims of the study were to determine the CI practices of South African companies and to test the generalisability of the Calof and Breakspear 1999 Canadian CI study. At the time,

little had been published globally and in South Africa about the holistic intelligence model.

The research was built around the six key areas which collectively form the intelligence model as identified by Calof and Breakspear, i.e. planning and focus, collection, analysis, communication, process and structure and organisational awareness and culture (Calof & Breakspear, 1999). Research findings suggested that South African companies showed a general lack of appropriate processes or structures for CI. Companies were particularly poor in the formal organisation and process for intelligence and there was little evidence that systems in companies support the CI activities. There was also a lack of intelligence tools such as Knowledge Management and the Intranet and little information sharing took place. Few companies had a central coordinating point for receiving competitive information and few had dedicated CI units. The core CI activities resided mostly in the marketing function with either the marketing manager or the CEO taking ultimate accountability (the latter particularly true in smaller companies) and companies were spending too much time collecting information and too little time on adding meaning and value to information and making it actionable intelligence, i.e. analysis (Viviers, Saayman, Muller & Calof, 2002).

The positive outcomes of the study included the fact that companies in South Africa acknowledged that CI can enhance competitiveness and regarded it as a legitimate business activity. Also encouraging was the fact that the focus of CI activities extended beyond analysing competitors to include regulatory matters and customers and suppliers and this was a positive observation. The overall conclusion was that by 2001, South African companies were not yet as well equipped to conduct good intelligence practices as their counterparts in the United States, Japan, Sweden, French, Israel and others.

The trend toward regarding CI as a continuous and formal activity in order to gain optimal benefits did however emerge since that first study. The number of companies developing intelligence units had risen

noticeably. In 2002, a second comprehensive study into the CI practices of South African companies confirmed these trends (Viviers, Saayman & Muller, 2003). This comparative project researched the CI practices of South African and Flemish exporters and was conducted in cooperation with two Flemish universities. Some interesting new insights into the constructs of CI developed and included the following: More than 50 per cent respondents indicated that they had an organised CI activity in their company and CI was mostly housed in the sales and marketing division of companies. Most of the CI time is spent collecting information rather than planning and analysing but a positive aspect was that people inside the companies were recognised and used as primary sources of information (Viviers, Saayman, Muller, Cuyvers, De Pelsmacker & Jegers, 2004).

Larger companies were found to adopt CI in a more comprehensive manner, including designing and setting up structures and appointing dedicated CI staff. However, few and limited to the largest companies in South Africa. More often, companies embark on the CI route incrementally, often taking key intelligence needs and driving them as projects. The smaller the company, the higher the incidence of unsophisticated part-time CI practices. CI is then often executed in a rudimentary manner by the CEO and often in reaction to a particular negative incident (Viviers *et al.*, 2004).

An interesting observation of the CI practices of South African companies is that the more companies rely on exports and interaction with the international market, the more they are inclined to adopt CI and the higher the understanding of CI's place as strategic business decision tool. There is also a higher natural acceptance and understanding of the benefits and place of CI. Another observation is that managers that have had international exposure either for having served in multinationals or from origin, are also more natural practitioners of CI or are more familiar with the discipline.

Multinational companies in South Africa face unique challenges as far as CI is concerned. Probably the biggest challenge is to find a model

for CI. Motorola's former chairman Bob Galvin stated that multinationals, like their government counterparts, need their own intelligence programme if they are to operate and compete successfully around the world. He also realised that CI should be run by a small cadre of professionals, not amateurs or part-timers (Academy of Competitive Intelligence, 1999).

The successes of South African companies in the 21st century in an increasingly competitive market place depend on the quality of business information that those companies apply to their key business processes. Given increasing competition in global markets, companies require a capability that adds the competitive perspective to the overall strategic equation. A sustained commitment to competitive intelligence at South African companies will promote value creation via innovation.

From a teaching point of view, CI in South Africa grew from the business environment. Until the 1990's, academics were not involved in research into CI nor were formal training and education programmes developed. At present, CI programmes are presented at university level by some universities and research into CI practices has grown. (For more detail see Viviers & Muller, 2004).

4 Conclusions

The fact that the world is becoming increasingly competitive for South African business is undisputed (including fluctuating exchange rate, the country's geographical proximity and the unique challenges facing South African managers who have to deal with various regulations and legislative matters). How South African managers will meet these challenges is not clear and few have actual plans to improve their ability to keep track of competitors and competitiveness. There appears to be a degree of complacency and self-deception that is inhibiting managers from instigating effective planning to improve CI and few conduct CI in a formal systematic manner (Viviers *et al.*, 2004). Research has, however, shown that managers do recognise a need to better integrate CI in

their companies' business processes. CI as a means to keep track of changes in the competitive landscape will grow, as more companies of different sizes and from various sectors across the board, will expand on their CI capabilities.

In a broader sense, globalisation and continuously increasing competition pose interesting challenges on a micro and macro level for organisations and the public authorities. This will prompt them to make adjustments to cope with the changing environment (Mboweni, 2000). The need to enhance the country's competitiveness will remain, as is evident in two competitiveness rankings. CI as a strategic management tool should form an integral part of efforts to enhance the competitive behaviour of South African companies and society as a whole.

Formal CI training is not yet provided at an appropriate level at South African learning institutions. Although some progress has been made in developing modules/programmes, much still needs to be done.

Training/education needs will increase and it is expected that training institutions in particular higher education institutions will expand on their formal CI courses especially in management and information management sciences. With better teachings available, in particular in terms of strategic and competitive analysis and the management of CI, these weak areas of the discipline are sure to improve with time. Unfortunately, these are also the most important aspects of efficient CI practices, e.g. advanced analysis skills. Most analysis skills are limited to basic techniques like SWOT and low-level profiling of competitors, markets and industries. Analytical skills are not yet honed to be capable to integrate a variety of factors, internal and external to companies and the use of a variety of complementary analysis techniques into insightful competitive pictures. Companies still spend too much time gathering information. In-depth training on CI, in particular competitive and strategic analysis and the management of CI is sorely missed and is expected to gain attention of leading educators in South Africa.

5 Recommendations

In order to increase awareness of CI as an instrument to enhance competitiveness in South Africa and South African companies, a number of actions could be taken.

South Africa could learn lessons from other developing and developed countries (governments and business) by studying how they leverage CI to become effective knowledge economy players while growing their own economies and creating jobs. In Canada, CI activities have steadily increased over the past 10 years in the form of research output, course delivery, SCIP involvement, company practices and government involvement (Calof & Brouard, 2004). In India's silicon state, Bangalore, the motto is to partner with the best in the world, learn from them, and become the best in the world themselves (Hewitt, 2000). Italy's Sicily is becoming a high-tech capital and fast becoming the most competitive place in Europe for high-tech investments. Ireland is a country that has transformed itself from an agricultural economy to another European hot spot for financial services and high-tech industry. These areas all hold invaluable lessons on how to create competitive advantage in the globalised economy.

Research into CI should also be expanded. Specific research topics could include how CI could be instrumental in enhancing South Africa's exports and benchmarking best practices in CI education at school and university level (e.g. Sweden and Australia).

Also, the role of government in supporting CI as a mean to enhance competitiveness (e.g. France and Canada) could be researched and comparative CI studies with other African countries could be launched to take advantage of nearby successes in enhancing competitiveness (e.g. Tunisia, the Gambia and Botswana). In order to enhance the competitiveness of South Africa, the government could ensure that institutions and institutional environment functions optimally support business activity.

Universities and institutions of higher education could develop comprehensive CI courses developed specifically for South African leaders and managers and learning from the best in the world.

In the final instance, South African company managers should enhance and support the use of CI as a strategic management instrument. Successful CI strategies require a long-range vision, consistent strategic focus and a contention for market leadership. Unless South African companies start practicing CI routinely and comprehensively and also use the outcomes of the CI process (i.e. intelligence) continuously in strategic decision making and thinking, South Africa's global competitiveness ranking will remain under pressure.

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