

COMPETITIVE INTELLIGENCE IN SOUTH AFRICA: A HISTORIOGRAPHY

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Abstract

The purpose of this paper is to provide a historical overview of competitive intelligence development in South Africa. This paper adopted a historiography approach. Information was gathered from published peer-reviewed journal articles on competitive intelligence. These sources of data hold the greatest value in the validity and reliability of this paper. Most historical researches are often associated with historiography as the primary research method. Historiography goes beyond data gathering to analyze and develop theoretical and holistic conclusions about historical events and periods. It includes a critical examination of sources, interpretation of data, and analysis that focuses on the narrative, interpretation, and use of valid and reliable evidence that supports the study conclusions. Although a historian studies history or may teach history, the historiographer writes, analyzes, and interprets history. Historical research was of particular relevance to this paper on competitive intelligence, a contemporary concept in developing countries, as it enhances an understanding of the present. Any contemporary issue is bound intrinsically with the social and historical milieu of the past. Findings show that competitive intelligence is in its infancy stages twenty years after its introduction in South Africa. This paper will influence policy formulation, locally and regionally.

Keywords: Competitive Intelligence, South Africa, Historical Antecedents

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1. Introduction

The topic of intelligence is vast and that it is impossible to describe the history of the intelligence field in one paper as its roots can be traced to military engagements, business and government practices (Prescott, 1999; Juhari and Stephens, 2006). The Art of War by Sun Tzu is one of the earliest sophisticated references with a set of essays written around c. 500 B.C. and is the basis for many of the developments in military intelligence (Kelley, 1968; Griffith, 1971; and Juhari and Stephens, 2006). Berkowitz and Goodman (1989) state that a second stream of intelligence activity concerns national security as a policy issue. This stream, particularly in the U.S.A, has its roots in the World War II era and is linked to political science (Prescott, 1999). Ecells and Nekemkis (1984) provide a third stream that places the focus on business organization. Competitive intelligence has evolved over a period of time. Therefore, it is important for competitive intelligence

(CI) scholars and thinkers to look back to historical incidences to find answers to today's challenges in CI and business at large (Juhari and Stephens, 2006).

The field of CI has passed through three stages and is currently struggling to define its next stage of development (Prescott, 1999). These stages are as shown in Table 1 below. According to Prescott (1999) the first stage of CI development was "Competitive Intelligence Gathering" that occurred through the 1960s and 1970s. Around 1980 the second stage, "Industry and Competitor Analysis," emerged and was most strong during the mid-to-late 1980s. Currently, the stage of development can be characterized as "Competitive Intelligence for Strategic Decision making." Furthermore, he states that the future rests on developing CI as a source of competitive advantage (CA) and is labeled "Competitive Intelligence as a Core Capability." How did Prescott came up with the choice of the 1960-1970 period?

Table 1. Evolution of competitive intelligence

Time Period	Pre- 1980	1980-1987	1988-Present	Future
Stages	Competitive data gathering	Industry and competitor analysis	CI	CI as a core capability
Key defining event	Porter's 1980 book, competitive strategy	The founding of the Strategic and Competitive Intelligence Professionals	The establishment of the CI review	CI courses taught in business schools across the world

Source: Adopted from CI by Prescott, 1999

The measurement between stages in the evolutionary framework is based on key defining events. Prescott (1999) admits that the choice of the 1960-1970 period was judgmental as academic writing and practitioner activity was limited before 1970. He further states that a database search of citations on the topic of CI confirms this assertion. This period was, however, marked by significant researches.

A survey that was conducted by the Harvard Business School in 1959 focused on the state of the practice of intelligence. This study illustrated that the process was in its infancy and informal (Prescott, 1999). Pinkerton (1969) in Prescott (1999) produced another significant set of research, which detailed the steps that were undertaken by a company in the Midwest that established a marketing intelligence system. This is the most detailed case study in the field (Prescott, 1999).

The field of CI has grown over the past two decades to become an integral part of most large organizations (Fuld, 1995; Kahaner, 1996; McKihnons and Burns, 1992, Goshal and Westney, 1991 all in Prescott, 1999). Global competition, the emphasis on quality management, and the realization by managers that actionable intelligence can be a key CA have spurred this growth (Prescott and Gibbons, 1993). Prescott's 1999 CI definition was adopted for the purpose of this paper.

Prescott (1999) defines CI as the process of developing actionable foresight regarding competitive dynamics and non-market factors that can be used to enhance competitive advantage. Of note in this definition is the competitive dynamics which refers to the evolution of a firm's industry and the moves and counter moves of competitors, suppliers, customers alliance partners, and potential competitors. However, a more comprehensive and recent definition was proposed by Pellissier and Nenzhelele (2013). CI has evolved from many disciplines.

CI, as it is known today, is actually an amalgam of disciplines. Historical records reveal the important role that intelligence has played in the history of countries (Underwood, 2002). Juhari and Stephens (2006) state that CI evolved from developments in economics, marketing, military theory, information science, and strategic management. Walle (2001) states that some authors argue that CI had its genesis in religious texts as far back as c. 1000 B.C. with some saying that it was derived from warfare. The very idea of CI and its terminology, as incidences in history throughout the world proves, has been around far longer than when the term was first considered a must-do practice by American organizations wishing

to succeed in their chosen commercial arena, or in their inter-and intra-government relations (Juhari and Stephens, 2006). Primarily, the technology explosion of the 1990s probably stimulated the notion of CI as being something entirely new or even revolutionary as a means to increase the depth and breadth of CI. CI can also be traced back to the development of ancient emperors and ancient wars.

Historical records also indicate that the Byzantine emperor Justinian I (483-565) in the 6th Century deployed monks to steal silk worms from the Chinese in an attempt to understand how to make silk (Fraumann, 1997). While no formal system was established, CI was practiced but the recognition of the need for arranging for systematic (and legal) marketing intelligence came slowly in business (Kelley, 1968). For a more detailed and comprehensive pictorial depiction of CI incidences around the World and the subsequent CI evolution, see Juhari and Stephens (2006). Below are some of the ancient developments in CI.

In China the incidences of CI can be traced from c. 500 B.C. to be 20th century with the famous military strategist, General Sun Tzu (c.500 B.C.) and master strategist Kong Ming or Zhunge Liang (c. 220 A.D.) at the center of CI development. The intelligence system of the Chinese, in which Eunuchs were critical players, played a significant role in their liberation from the Mongols. Menzies' (2002) historical findings about a Chinese Eunuch, Admiral Zhu Di, attest to the 'intelligence' role they played. In Rome the incidence of CI can be traced back to 204 B.C. to the famous Scipio a Roman general. His modus operandi was, study your enemy until you are absolutely certain of his habits and in his habits you will find his weakness (O' Leary, 2004). Incidences of CI can also be traced to different countries with the Middle East from 1100, Mongolia in 1234, Japan from the 16th Century, Great Britain from the 1500s, North America from the 1800s-1990s (Hillenbrand's, 1999; Morgan, 2001; Ikeya and Ishikawa, 2001; Nakagawa, 1993; Mioa, 1993; Kahaner, 1996; Deacon, 1982; Hannon and Sano, 1995; Breed, 1999; Schirokauer, 1988; Britannica, 1971; Fuld, 2002; Kelley, 1968; Underwood, 2002; Farago, 1954; Hallion, 1997; SCIP, 2002; Smith, 1956; Lambert, 1967; Colby, 1993; Sammon, Kurland, and Spitalnic, 1984; Wang, 2001; Prescott and Gibbons, 1993 all in Juhari and Stephens, 2006). South Africa has its own CI history that forms part of the international developments in CI.

2. Competitive intelligence in developing countries

According to Du Toit (2013), CI management is a well-established function in organizations in developed countries, because managers have realized that if they do not monitor the actions and activities of their competitors, their strategic plans will fail. Nasri (2011) states that the advances in managing intelligence are as yet largely unknown in developing countries and they are continuously being surprised by undesirable changes in the environment. Hawkins (2004) and Nasri (2011) emphasize that companies in developing countries should use formal processes of collecting, analyzing and disseminating intelligence to successfully compete in the global economy. Pellissier and Kruger (2011) add that by utilizing CI, organizations in developing countries will be able to gain a greater market share and to compete successfully against international competitors. Kahaner (1996) states that CI can be used as a way to win economic wars, hence the need for companies to fully embrace CI as a weapon in these economic wars. Ifan et al., (2004) state that after a period of recession and inflation, most developing countries have to face the necessity of improving their capacities to innovate and increase the competitiveness of their industries. Du Toit and Sewdass (2014) state that in order to compete in the global economy, developing economies should apply CI. According to Dou et al., (2005), developing economies, create new products from their natural resources to contribute to their countries' foreign direct investment.

3. Evolution and development of competitive intelligence in South Africa

In the period 1994 to 2001, South Africa was successful in stabilising the economy, improving the confidence of domestic and foreign investors, rebuilding its reputation among lenders, bringing down inflation and restoring the health of the public finances. Improving foreign investor confidence was important because by 1994, South Africa had a very low savings rate. Tariff liberalisation exposed domestic industry to international competition. Some industries survived and thrived, but others were unable to compete internationally and shed significant numbers of jobs. By the early 2000s, South Africa was able to raise investment levels with some ease by attracting foreign capital. The most binding constraint of the apartheid economy – access to capital – had been broken. This period was followed by a period of economic boom.

The period 2003 to 2008 saw the longest economic boom in South Africa's history. Employment increased faster, unemployment fell, investment rose and inflation and real interest rates declined rapidly. The global economic downturn brought a halt to that progress, with the consequent

domestic recession reversing many of the country's gains in employment creation and investment levels.

The South African economy became one of the strongest economies in Africa after 1994 and became well integrated into the world economy and because of this; competitiveness has become a contemporary issue (Du Toit and Strauss, 2010). The development of CI in South Africa dates back to the launch of the South African SCIP chapter in the mid-90s albeit slow take-off. Before 1994, South Africa was isolated economically, politically, and socially from the rest of the world (Du Toit and Strauss, 2010). Before that period, CI was associated with industrial espionage due to the prominent role of the security establishment in the apartheid era and the connection made between intelligence and spying (Viviers and Muller, 2004). Calof and Viviers (1995) state that sanctions, exchange control regulations and inward-looking culture inhibited the growth of international trade in South Africa in the period prior to 1994. The country was hit by a significant number of withdrawals by multinational companies after the 1994 elections as a means of protest or forced by pressure (Viviers et al., 2005). During this period there were many protectionist measures in place and moreover, the economy was highly regulated (Viviers et al., 2005). However, soon after the April 1994 elections, the international market became more accessible for South African products. They further argue that the full force of internationalization and globalization severely hit South African companies that were ill prepared for global competition hence, their call for CI. In the late 90s, CI consultancies started growing in stature and number and this growth coincided with the emergence of complementary management instruments that include knowledge management, total quality management and the balanced score card (Viviers et al., 2005). Research was very slow during this period. This period also saw the establishment of many different professional groups.

CI then got increased attention and various professional groups were established such as Strategic and Competitive Intelligence Professionals Southern Africa (SCIPSA) the South African Strategic and Competitive Intelligence Professionals (SAACIP) and the Knowledge Management Society of South Africa (KMSSA) (Viviers et al., 2005). Du Toit and Strauss (2010) state that the membership ratings of these groupings were very low, and in 2008 none of these CI groups was functioning. Viviers and Muller (2004) argue that there was no recognizable list of practicing CI professionals available in South Africa. However, according to a research that was done by Du Toit and Strauss (2010), the University of Johannesburg's database shows that 132 companies were still practicing CI, though the number was low.

Few studies on CI practices in South African companies have been conducted yet. Although South African companies were included as part of a global study on intelligence practices done by SCIP (1997),

very few questionnaires were returned (Viviers et al., 2004).

Until that time, research in CI in South Africa has been so limited and the first comprehensive research projects were launched in the beginning of the century (Viviers et al., 2005; Viviers and Muller (2004). The first in-depth research into CI practices was conducted in 2001 when CI was still in its infancy stages (Calof and Viviers, 2001). The study was carried out to determine CI practices in South African companies and to test the generalisability of the Calof and Breakspear's (1999) Canadian CI study (Viviers et al., 2005). The research findings of that study showed a general lack of appropriate processes or structures of CI in South African companies. There was also a lack of intelligence tools such as knowledge management and the intranet and little information sharing took place. The overall conclusion of that study was that by 2001, South African companies were not yet well equipped to conduct good intelligence practices as their

counterparts in the U.S.A, Japan, Sweden, French, Israel and others (Viviers et al., 2005). Another comprehensive study was done in 2002 (Viviers and Muller, 2004 and Saayman et al., 2004).

In 2002, a second comprehensive study of CI practices in South African companies was carried out and it confirmed the following trends (Viviers et al., 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 were discovered as, more than 50 percent respondents indicated that they had an organized CI activity in their companies and CI was mostly housed in the sales and marketing division of their companies. Large companies were found to have adopted CI in a more comprehensive manner, including designing and setting up structures and appointing dedicated CI staff (Viviers et al., 2005, Du Toit, 2003 and Viviers and Muller, 2004). Table 2 below shows some of the CI studies in South Africa.

Table 2. Competitive intelligence studies in South Africa

Author (s)	Theme
Sewdass and Du Toit (2014)	Current state of CI in South Africa.
Du Toit and Sewdass (2014)	A comparison of competitive intelligence activities in Brazil, Malaysia, Morocco and South Africa.
Du Toit (2013)	Comparative Study of Competitive Intelligence Practices between Two Retail Banks in Brazil and South Africa.
Pellissier and Nenzhelele (2013)	Towards a universal CI process model.
Fatti and Du Toit (2013)	Competitive intelligence challenges faced by South African Pharmaceutical companies.
Sewdass (2012)	Proposing a CI framework for public service departments to enhance service delivery.
Pellissier & Kruger (2011)	Understanding the use of strategic intelligence as a strategic management tool in the long-term insurance industry in South Africa.
Du Toit and Strauss (2010)	CI and Africa's competitiveness: What's happening in South Africa?
Strauss and Du Toit (2010)	CI skills needed to enhance South Africa's competitiveness.
Muller (2009)	How and what others are doing in CI: various CI models.
Heppes and Du Toit (2008)	Level of maturity of the CI function: Case study of a retail bank in South Africa.
Muller (2007)	Global CI practice.
Du Toit (2007)	Competitive intelligence as a means to enhance competitiveness in Africa.
Ku'hn (2005)	Innovation and competitiveness in South Africa: the case for competitive intelligence as an instrument to make better use of information.
Viviers, Saayman, & Muller (2005)	Enhancing a competitive intelligence culture in South Africa.
De Pelsmacker, Muller, Viviers, Saayman, Cuyvers, & Jegers, (2005)	Competitive intelligence practices of South African and Belgian exporters.
De Pelsmacker, Muller, Viviers, Saayman, & Cuyvers, (2005)	CI practices of South African and Belgian exporters.
Viviers, Muller and Du Toit (2005)	CI: An instrument to enhance South Africa's competitiveness.
Du Toit (2004)	Organizational structure of CI activities: a South African case study.
Viviers and Saayman (2004)	Testing and refining the constructs of the competitive intelligence process.
Viviers, Saayman and Muller (2004)	CI in South Africa 1999-2002 and beyond.
Viviers & Muller (2004)	The evolution of competitive intelligence in South Africa: Early 1980s-2003.
Odendaal (2004)	Competitive intelligence with specific reference to the challenges facing the competitive intelligence professional in South Africa.
Du Toit (2003)	Competitive intelligence in the knowledge economy: what is in it for South African manufacturing organizations?
Vivers, Saayman, Calof, & Muller, (2002)	CI practices: A South African study.
Calof & Viviers (2001)	Creating an intelligence society in South Africa.
Muller (1999)	South Africa: An emerging CI player.

4. Demand for competitive intelligence by South African firms

The need for CI in South Africa is growing. Companies and individuals are realizing the value of CI for their institutions and for themselves. Not very long ago, CI was relatively unknown and practiced only by a select few in South Africa. Medium to large companies do practice CI (Viviers et al., 2004). The demand for CI is skewed towards medium and large companies. According to studies conducted in South Africa since 1994, medium to large companies showed a higher embracement of CI in comparison to small companies (Viviers and Muller, 2004; Du Toit and Strauss, 2010; Sewdass and Du Toit, 2014; Viviers et al., 2005). Since 2001 many South African companies have made efforts to collect, analyse, disseminate and utilize information on the external environment (Sewdass and Du Toit, 2014). They further argue that the number of companies with CI units had risen noticeably. According to Viviers et al., (2002) many large companies in South Africa have adopted CI in a comprehensive manner, which has included designing and setting up structures and appointing dedicated CI staff. Small firms have not yet embraced CI. Research by Du Toit (2003) shows that less than half of the manufacturing enterprises have CI units in South Africa.

5. Competitive intelligence professional services in South Africa

According to research by Viviers and Muller (2004), there was no recognized list of practicing South African CI professionals in South Africa. Sewdass and Du Toit (2014) state that many of the first generation CI professionals in South Africa came from the National Intelligence Service (NIS) and government organizations and that the majority of CI consultants in South Africa were employed by the NIS before 1994.

6. Competitive intelligence education in South Africa

Findings by Du Toit and Strauss (2010) show that there was no university in South Africa that offers a degree in CI, however, CI modules were included as part of various graduate courses. They further state that University of Johannesburg and University of Pretoria were offering extracurricular courses in CI. The department of information science at the University of Pretoria offers certificate courses in information and knowledge management as well as CI. The aim of these courses is to provide practitioners involved in these fields with the necessary skills to contribute to the intellectual capital and thus the competitiveness of their organizations. The University of Pretoria was the first academic institution in South Africa to recognize the need for

formal academic training in CI (Viviers, et al., 2002). In South Africa the formal training and education aspects of CI also remains a challenge with few higher education institutions offering dedicated CI education programmes (Muller, 2007).

7. Government involvement in competitive intelligence

According to Fleisher and Blenkhorn (2003), the government of South Africa was looking at requiring all of its CI practitioners to register with the government since they would supposedly be dealing with classified or sensitive official information. The government, however, changed its view on this matter in 2001 after repeated attempts by South African Association of Competitive Intelligence professionals (SAACIP) and SCIP's members in the country to convince the government to drop the idea of registration of CI practitioners. In a related issue, Kelly (1999) states that an increasing number of countries, including the USA, UK, Australia, South Africa, and Russia, have made public declarations stating that they are using their intelligence organizations to conduct economic espionage and to protect against the economic espionage efforts of other nations. Government intelligence is being used to provide counterintelligence support and economic intelligence to government decision-makers; monitor trade agreements; collect information on unfair practices; monitor "special activities" designed to influence events, behavior, or policy formulation in foreign lands; and pursue commercial information and technologies for favored commercial groups (Porteous, 1995, 1993).

The issue of competitiveness in South Africa is discussed daily and is viewed as a core strategy by government, private and public institutions and companies. Calof and Skinner (1999) claim that a country will underperform without an appropriate CI infrastructure. Prescott and Gibbons (1993) state that the key question is not whether governments should play a role in a company's CI efforts but what should be the purposes and methods used by government. The South African government introduced a new competition law, the Competition Act, no. 89 of 1998 which was promulgated and became effective in September 1999. The Act provides for the establishment of three specific institutions to implement the law; a Competition Commission, a Competition Tribunal and a Competition Appeal Court. The overall purpose of the Competition Act is to promote and maintain competition, in order

- (a) to promote the efficiency, adaptability and development of the economy;
- (b) to provide consumers with competitive prices and product choices;
- (c) to promote employment and advance the social and economic welfare of South Africans;
- (d) to expand opportunities for South African

participation in world markets and recognise the role of foreign competition in the Republic;

(e) to ensure that small and medium-sized enterprises have an equitable opportunity to participate in the economy; and

(f) to promote a greater spread of ownership, in particular to increase the ownership stakes of historically disadvantaged persons (Government of South Africa: Competition Act, no. 89 of 1998).

The global competitiveness index (GCI) is one of the two indices used by the world economic forum (WEF) to measure a country's national competitiveness in terms of macroeconomic environment, the equality of public institution, that is, institutional capacity and technological progress. Table 3 below shows the GCI for South Africa since 2003.

Table 3. World Economic Forum (WEF), Global Competitiveness Index (GCI) for South Africa

Year	Ranking	Percentage
2012-2013	52 out of 144 Countries	36%
2011-2012	50 out of 142 Countries	35%
2010-2011	54 out of 139 Countries	39%
2008-2009	45 out of 134 Countries	34%
2004-2005	41 out of 102 Countries	40%
2003-2004	42 out of 102 Countries	41%

Source: WEF, African competitiveness report

8. Current policy trends in competitive intelligence in South Africa

Countries such as France, Sweden, Japan and Canadian have recognized the value of government and industry working jointly in the development of an intelligence culture (Sewdass and Du Toit, 2014). The South African government has played a major role through supporting exports for further economic development and through deregulation and privatization of many industries and also through a large construction boom prior to the 2010 soccer world cup. Du Toit and Strauss (2010) stressed that aggressive sponsorship and the commitment of government leaders in a CI campaign is very crucial. Practitioners, however, feel that nothing much has been done in terms of policy in the field of CI in South Africa.

9. Conclusion and recommendations

Most of the CI professionals came from NIS as compared to those that came from universities. South African companies have failed to conduct good intelligence practices and showed lack of appropriate structures for CI (Saayman et al., 2004). In addition, the bias of CI response rate towards larger companies makes CI more applicable to large South African companies, especially those active in the manufacturing sector. The evolution and developments of CI in South Africa show that the demand for CI is higher though there has not been much intervention and support by government. The government of South Africa has been criticized for failing to create an enabling environment and to support CI through policy implementation. Given the deeper historical and structural factors, and challenges in South Africa, the conduct of policy is not likely to be smooth or rapid. The following has been given as serious constraints on the growth of CI in South

Africa; data protection legislation, fear that CI is unethical, counter-intelligence, espionage and failure to deliver on promises.

A more important point should be for South Africa to design a National Competitive Intelligence System which will get together, coordinate, all the wills and actions of people in hard technologies (such as energy, transports, telecommunication, robotic, electronic), soft technologies which will facilitate hard technologies to come up to the markets embedded in various products or services, and new academic models such as cooperative work (platform to built up knowledge), distance learning, continuing education (from vocational school to university and doctorate), innovation. It is important that in this process all the three aspects should be worked up together.

Hard Technologies which necessitate a lot of research and development will not allow a developing country to create rapidly an internal potential to increase its Gross National Product (Dou et al., 2005). There is a necessity to "push" the development in two other directions: soft technologies and new educational systems. They further state that, to move the country or the region or the enterprises in these direction calls for a strong incentive. Competitive Intelligence as a National stake is one of the best way to create this incentive. This National Competitive Intelligence system will allow the various administrations, industries, regions, to look at the problems the same way, and to consider that cooperation and integration of the tacit knowledge of people in project development will help to set up the best conditions of success. At the same time, this will strengthen the energies to the same goal, increase the global potential of the country and among it, to create the conditions to develop the immaterial capital one of the best recognized asset.

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