EXECUTIVE SUMMARY

Intelligence Scope is one of the six Key Success Factors of a world class Market Intelligence program as defined by GIA. Determining the corporate user groups, breadth, depth, and future orientation of the intelligence program, the intelligence scoping exercise serves as the first step in establishing an intelligence program.

At world class levels, the scope of the intelligence activity goes both wide and deep, featuring an extensive information architecture but also a comprehensive set of analytical intelligence output on top of the regular market signals monitoring.

In addition, the intelligence program looks into the future rather than only analyzing facts of the past, and serves different corporate functions according to each one’s specific intelligence requirements.
The term “Market Intelligence” which is used in this paper refers to understanding the present and future business environment by using the intelligence process to provide decision-making support. Terms such as competitor analysis, technology analysis or customer insight will be used under the overarching term “Market Intelligence”. “Market Intelligence” should be seen as synonymous with concepts such as Competitive Intelligence and Business Intelligence.
1. INTRODUCTION: MI SCOPE AS A KEY SUCCESS FACTOR OF MARKET INTELLIGENCE

Initiating an intelligence program entails certain fundamental questions that need to be addressed:

- What are the target user groups that the intelligence activity should serve?
- What are the topics on which these target groups will need information, and how will they be prioritized for strategic quick wins and a long-term impact on business performance?
- What kinds of intelligence deliverables will the user groups require?
- What will be the time horizon of the intelligence deliverables?

Defining the scope of the intelligence program translates into conducting a needs analysis for the entire intelligence program: Identifying the corporate functions that will be using the intelligence deliverables, and topics and themes that each of them is most interested in. Additionally, the degree of future orientation needs to be addressed; looking into the rearview mirror is a good starting point, however in a mature MI program, a great deal of time is spent on outlining possible future scenarios about the anticipated developments in the operating environment.

Exhibit 1 highlights some of the most typical user groups to intelligence, and the intelligence topics of interest. In a typical scenario, the first target group to the intelligence activity is the corporate function (and the adjacent ones) under which the intelligence program has been placed. Since Business Development, Marketing or Strategic Planning functions frequently initiate the intelligence program, the primary target groups of the activity are typically made up of people working in client-facing positions, or in those that involve strategic planning.

Exhibit 1. The scope of the Market Intelligence program covers the target groups of the activity, and their primary information requirements. Topics of importance will vary between target groups, as will the ideal deliverables.
Establishing and operating an intelligence program is an investment in internal “process infrastructure”; it would be a waste of resources not to at least consider expanding its reach beyond the initial target groups that have intelligence needs. Sourcing, risk management, investor relations, and Research & Development are examples of activities that are highly dependent on accurate business information and may benefit from the existing intelligence activity, if only its scope will be extended to cover their specific needs. Indeed what is typical of rather immature intelligence operations is that information to cater to the needs of different user groups is being collected and processed in silos, which easily results in cost redundancies and missed synergies.

2. GETTING STARTED: DEVELOPING THE INTELLIGENCE SCOPE

2.1 Start small and expand the scope along the way

Developing an intelligence program from the ground up may seem like a daunting task, considering all the aspects that should be covered with very limited resources, especially at the start. Getting just the intelligence scope right will require considerable efforts if one aims at going both wide and deep in the topics of interest, serving numerous corporate functions, and delivering highly future-oriented intelligence output.

In practice, the intelligence scoping effort is best started small and expanded gradually as the intelligence program matures and resources are made available for those activities that are seen as valuable for the business.

The first step of development in scoping the intelligence efforts is reaching the stage where there’s at least some sort of focus in the intelligence activity rather than only putting out fires as they emerge. Most companies concentrate on first understanding their customers and competitors better, and this immediate focus may often carry over as the most important focus area throughout the intelligence development effort.

Many companies call the immediate priorities “KIts”, Key Intelligence Topics, of which there may only be 10 or even fewer. Working on the immediately relevant, strategic topics first is also wise from the ROI perspective: With success stories, it is possible to rapidly prove the value of the intelligence activity and legitimate further investments in the area. Gradually with added resources, companies tend to widen their intelligence scope by expanding the information architecture, i.e. the organized list of topics that are deemed relevant for the company’s business.

Going forward still, the intelligence scope on the average tends to deepen, i.e. both the level of analysis and the level of detail of the intelligence deliverables increases, and so will their usefulness for strategic decision-making purposes. Finally, an increasing emphasis will be put on future-orientation, i.e. in addition to producing highly analytical output on a wide range of topics – and probably for a wide user base – the intelligence program will deliver glimpses about the anticipated business future and possibly suggest strategic choices that the company might consider, going forward.

At this stage, we must remind the reader that the sequence of development efforts – of first going wide and only then deep - that has been suggested above and discussed further in the following chapters is rather typical, however there is no reason for not to first produce just a few deeply analytical deliverables for a narrow user group on a narrow set of priorities, and only then expand the scope to cover several user groups and topic areas.
2.2 Breadth of scope: Developing the information architecture and launching the first intelligence deliverables

Once the primary user groups of the intelligence output have been defined, their intelligence needs should be addressed. These needs will fall under two categories: The topics on which information is needed, and the format in which the output should be delivered. Exhibit 2. Highlights the topics on which most organizations need information through their intelligence program and organizes them into a three-dimensional framework.

- **The value chain dimension**: Understanding customers is important for any company, as is understanding what the competitors are doing. With the tendency of many companies moving up the value chain to reach for the end customer in their search for higher value-add and higher margins, it has also become commonplace to add “customers’ customers” to the list of intelligence topics on the value chain. As the activity of moving up the value chain may also be taking place behind the company on the supplier side, increasingly many companies have added suppliers to their list of intelligence topics even though the suppliers may have traditionally been something that “the company already knows enough of”. Finally, there may also be parties around a company that are not directly part of the same value chain but may still have an impact on the company’s business (for instance authorities or industry associations). We call these parties “interest groups”.

- **The scope of topics**: Many market developments that are relevant for a company are taking place at the level of individual companies, i.e. suppliers, competitors, customers, and customers’ customers that are therefore included under the company’s radar. Grouped together, the individual companies make up industries, the dynamics of which a company also needs to understand to be able to assess the developments that may be affecting their business and other companies on the value chain. Still beyond the industry level there are trends and drivers that may be forces completely outside of one’s own immediate business
focus. However, a social or political trend that is happening today might well impact one’s business environment several years from the current moment, and the company should therefore also keep trends and megatrends under their radar at least in the long run.

• **The geographical dimension:** The companies, interest groups, industries and trends that make up a company’s external operating environment are typically not identical for each geographical area that the company operates in, and the geographical dimension therefore presents yet another set of priorities to the topics that the company should focus on: Where does the company’s money come from today? What are the emerging growth areas? Which markets can perhaps be left with little attention?

Taking the intelligence scope towards increasing sophistication often starts with addressing the breadth of the intelligence activity, i.e. the topics: A list of topics of interest to the company will be developed that maps out the business environment as in Exhibit 2: The company’s relevant competitors, customers, customers’ customers and suppliers will be listed out, as will the respective industries, and the trends and interest groups that will likely have an impact on the company’s business. Finally, the geographical areas from which the company needs information are also added to the information architecture that now forms the skeleton around which the information content will be organized.

The length of the information architecture is not a value in itself even though the list of topics tends to become longer with the growing maturity of the intelligence program. An alternative way of addressing the breadth of the intelligence program is to first only focus on the Key Intelligence Topics of one or just a few target groups instead of the entire company, and the focus areas may subsequently only cover for instance customers and competitors, and further topics are added to the list as the intelligence needs evolve. At some point the direction of the development in the information architecture may also bounce back: It may not make sense to deliberately lengthen the list of focus areas with new companies or trends if very little is happening around certain topics on an annual basis, or the impact of those happenings to the own company would be minimal anyway.

The length of the information architecture is also a result of a cost-benefit analysis: Once the company starts conducting regular intelligence efforts on the selected topics of interest, it soon becomes apparent just how pricey it may be to include anything and everything under one’s radar (if for instance relevant information is not available from public sources in the English language). Also important is people’s ability to digest information: Massive amounts of data, even if relevant, as opposed to carefully digested and strategically meaningful messages may make all the difference in how well the entire intelligence program is received in the organization.

Once the initial breadth of the intelligence program has been determined, it depends on the company and the target group(s) of the intelligence deliverables, whether the first development efforts will center around setting up regular market screening for daily business signals about the selected topics, or whether it makes more sense to first concentrate on achieving quick wins through strategic analyses on certain key topics. Continuously collecting news and business signals about the developments in the business environment does make sense as it serves as a pool of readily validated information that feeds into the more analytical output. However, individual business signals alone, even if carefully selected and processed, will not lead to any strategic decisions, and many companies may want to first conduct careful analysis on a narrow list of topics before determining which of them are relevant enough to be put under continuous screening.
2.3 Depth of scope: Increasing the level of analysis on selected topics

Once the meaningful breadth of scope has been achieved for the intelligence program, at least initially, it is time to turn the attention to the level of analysis and detail of the output. At this point, at least those parts of the organization should be served by regular market signals updates that are most immediately in need of accurate market information (typically sales, marketing, business development, product management, or strategic planning, or all of the above).

Business needs of the primary target groups of the intelligence program will drive the high-level analysis efforts towards topic areas where insightful intelligence output should serve as decision-making support. On the other hand, if in conjunction with the information architecture setup a continuous market screening system has already been established to monitor the entire operating environment of the company, the system may also raise topics to the agenda that call for further analytical processing: Opportunities and threats may arise from the business environment that would go unnoticed without systematic market screening. As a result, companies start adding depth to their intelligence output. Business area reviews, company deep-dives, sales leads monitoring or ad hoc strategic research projects will emerge as intelligence deliverables on selected topics of interest.

Adding depth to the scope of the intelligence program may also happen in parallel with expanding its user base: For example, the corporate communications function, having seen that the current services do not fully match their information needs, may start to require media monitoring and peer group reviews, and people working in R&D might feel that they would benefit from the existing strategic research projects with a twist towards product and innovation management.

2.4 Future orientation: Building on the past but looking ahead

Even the production of both comprehensive market screening and highly analytical output on selected topics of interest, i.e. going both wide and deep in the intelligence scope, may still have the organization looking primarily in the rearview mirror. The natural next step in the scoping effort is therefore to shift the relative focus of the intelligence activity towards the anticipated future developments of the operating environment that may have an impact on the company’s business.

Simple as it may sound, this initiative will put an entirely new set of requirements to the analysts producing the output: They will now have to adopt the role of a forecaster, i.e. they will need to start providing interpretations and adding their own business judgment into the analysis output that perhaps only used to concentrate on delivering facts about the past.

Forecasting and anticipating future developments is not often simple, and it is hence not surprising to see entire groups of people with different backgrounds taking part in these efforts as the intelligence program matures and gains ground in the organization. Scenario analysis projects and wargaming or market simulation workshops are good examples of activities that are best conducted in groups, preferably involving senior management that is responsible for the future success of the company. The outcome of the efforts is highly future-oriented by definition: Scenarios deal with alternative futures, and market simulation is all about anticipating the potential competitive movements in the marketplace and developing alternative strategies for the own company, should some of them become reality.¹

¹ Scenario analysis has also emerged as a method for effectively compiling their information architecture as referred to in chapter 2.2 about the breadth of the intelligence scope. Scenario analysis results in a structured list of trends and uncertainties that have been collectively identified and deemed important by the company’s decision makers. Starting to continuously monitor the development of these trends and uncertainties is a natural next step to the scenario exercise.
3. CONTINUOUS DEVELOPMENT: TOWARDS WORLD CLASS LEVELS IN INTELLIGENCE SCOPE

When defining the scope of its intelligence activity, it is recommended that an organization always considers not only the most obvious and immediate user groups to it, but also thinks through whether process and cost efficiencies could be achieved by bringing in additional corporate groups to the user base of a centralized intelligence program. This review may of course also reveal that some functions are not best served by a centralized intelligence function but will rather depend on locally produced market information; however, such a conclusion should be reached through an active evaluation process.

Serving numerous corporate functions with a centralized intelligence program naturally means that the information architecture will be expanded accordingly. A comprehensive list of topics to be covered is not a value in itself (rather, prioritization is), however the list of topics tends to be longer in an organization where the scope of the intelligence program is mature and approaches world class levels as opposed to an organization in the early stages of its scoping exercise.

In any case, the evolution of the information architecture should never stop: The world changes, and so, too will the information architecture of a company that conducts world class Market Intelligence activities. Trends emerge, companies are acquired and sold, and industries expand and disappear. The scope of an intelligence program is never “ready”, but will continue responding to the requirements that the changes both outside and inside of the company will set to it.

The more mature the intelligence program of an organization is, the more time is typically spent on analysis work as opposed to just collecting information: The level of analysis is first raised in intelligence deliverables looking into the rearview mirror, but the relative focus should also be shifted towards analyzing different possible futures. Therefore reaching world class levels in Intelligence Scope is characterized by a high degree of future orientation in the entire intelligence program. In practice this means that the intelligence program produces deliverables such as:

- Sales leads reports that directly help generate new business in the future
- Strategic reports that include analytical conclusions and suggested interpretations in the company’s context
- Scenario analyses and workshops
- War gaming and market simulation exercises

One of the key things to bear in mind when initiating and further adjusting the scope of an intelligence program is that the intelligence requirements of the different target groups vary, and so

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<th>Informal MI “Firefighters”</th>
<th>Basic MI “Beginners”</th>
<th>Intermediate MI “Coordinators”</th>
<th>Advanced MI “Directors”</th>
<th>World Class MI “Futurists”</th>
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<tr>
<td>Intelligence Scope</td>
<td>No specific focus has been determined. Ad hoc needs drive the scope.</td>
<td>Limited scope, seeking quick wins. Focus typically on competitors or customers only.</td>
<td>Wide scope with the attempt to cover the current business environment comprehensively.</td>
<td>Both wide and deep scope covering not only issues of HQ interest, but also those that interest business units</td>
<td>Future-oriented scope that also covers topics outside of the current micro business environment</td>
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Table 1. Framework to World Class Market Intelligence
should the topics and deliverables with which the groups are being serviced. Few companies are uniform in their intelligence needs, and while the marketing function may be happy with a couple of analytical brand development reports annually, the sales team for example might require detailed, daily signals about new local business opportunities. The strategic planning function may require still different intelligence output to support its operations. This takes us back to square one: Determining the scope of the intelligence program is about discovering the areas where the corporate intelligence activity will be of most value for the entire company’s business.

4. INTELLIGENCE SCOPE – TRENDS TOWARDS 2015

4.1 Trends 2015 - Survey results
According to a Market Intelligence trends survey conducted among 146 respondents around the world in May 2010, the emerging growth markets such as China, Asia Pacific, Latin America, the Middle East and Eastern Europe are rapidly becoming part the geographic scope of most companies’ intelligence programs (Exhibit 3). The primary focus in these areas is gradually shifting from looking at investment opportunities and market entry strategies to continuously keeping the areas under the radar screen. Many Western companies already have an established presence in the growth markets, and they now need to stay on top of the local market dynamics both on an everyday basis and looking into the future. As a result, processing and translating local language business information will most likely consume more resources than before.

Which areas in the business environment will be under the heaviest change and therefore have the most significant impact on MI efforts?

Geographical perspective

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<td>Greater China</td>
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<tr>
<td>Asia Pacific</td>
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</tbody>
</table>

Exhibit 3. Anticipated changes in the regional scope of the intelligence program

Increase significantly (+2)  Increase moderately (+1)  Remain the same (0)  Decrease moderately (+2)  Decrease significantly (+2)
From a value chain perspective, customers, end consumers and competitors will continue to be under the primary focus of the intelligence efforts for most surveyed companies; Customers and end users since they drive the business whether in the mature markets or emerging ones, and competition since it typically influences the pricing and differentiation strategies. Suppliers and distributors in turn tend to be heavily under the radar screen in industries undergoing rapid changes in the value chain, i.e. M&A activity, partnerships and joint ventures on the supplier side, or for instance shifts in manufacturing technology or distribution strategies.

The scope of the intelligence efforts is initially determined by the MI needs analysis that should be repeatedly revisited even if the company is not expanding to new geographic areas, or the value chain that it belongs to remains stable. User groups to the intelligence program are also part of the scope of the activity, and the existing intelligence infrastructure can be leveraged to serve additional corporate functions and activities, of which Risk Management is an emerging example.

### 4.2 Risk management emerging as an application area of MI

With the Sarbanes-Oxley Act in force since 2002 and the more recent major failures in corporate risk management, it’s becoming increasingly important for especially public companies to comply with strict risk control measures both financially and qualitatively. From the MI perspective, this means that for instance sizable strategic investment decisions should be backed up with sound research and analysis, not only to ensure business success in the first place, but also to avoid the management being held liable afterwards for bad decisions made based on improper or missing information.

The implications of risk management becoming part of the application areas of MI in the organization are not exotic; Deliverables will need to be tailored accordingly, but the processes and methodologies hardly differ from other intelligence efforts. Market Intelligence can bring an external point of view to the risk management discussion that is typically internally focused: On top of internal business risks, management should consider risks originating in the customer base, competitive dynamics, macroeconomic factors, political environment, or technological shifts.

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Exhibit 4. The dominant focus of MI efforts continues to be on the front end of the value chain
5. CASE CISCO SYSTEMS: CREATING STRATEGIC FORESIGHT BY USING MEGATRENDS IN MARKET INTELLIGENCE

FUTURE ORIENTATION AS A FACILITATOR OF GROWTH

Future orientation is one of the key characteristics of an intelligence program’s SCOPE taken to world class levels, and we discuss with Joost Drieman, Director, Market and Business Intelligence European Markets, at Cisco Systems, about how the company is using megatrends in Market Intelligence to create strategic foresight.

A complete Market Intelligence program should be built around four pillars:

• Environment intelligence (economic predictions, market characteristics, social sustainability, opportunities in the addressable and adjacent markets)
• Customer intelligence (customers’ buying behavior, segmentation, profiling, demographics, upselling and cross-selling opportunities, customer satisfaction and loyalty)
• Competitive intelligence (the competitive landscape and power lines, strategies, presence in different markets, coopetition)
• Channel intelligence (the channel landscape and dynamics)

Understanding megatrends is seen as important in all of the intelligence areas above, but what is a megatrend? Joost Drieman gives an example: Over the next few years, 30 million Chinese will come over to Europe for business. A chain analysis quickly reveals that this trend will drive significant business opportunities in several industries: More aircrafts and airports will be needed – in the middle of the growing pressures of reducing air pollution – more hotels, restaurants, entertainment and various professional services will be needed, and all of the above will eventually set new requirements for communication infrastructure, which is of particular interest to Cisco.

Why then is understanding megatrends so vital for a company’s success? One naturally does not want to miss a trend so as to avoid losing market share, but for Cisco, understanding megatrends still represents more of an opportunity: One of the company’s objectives is to grow faster than the IT market on the average, and understanding megatrends is seen as a means to facilitate such growth.

HOW TO IDENTIFY AND PRIORITIZE MEGATRENDS?

Joost Drieman explains how Cisco in Europe has gone about mapping out megatrends that may have an impact on its business over the coming years:

1. Invite a group of internal experts from different parts of the organization
2. Gather insights from research providers such as academia, research institutions and consulting houses
3. Study megatrend on line surveys
4. Brainstorm based on the input on the potential upcoming megatrends, and list them out

In the end, Cisco had compiled a list of as many as 200 trends, and a critical assessment was in order: Was each one really impactful and enduring enough to be a megatrend, or were some of the observations rather just phenomena that would possibly fade away? As a result of the re-evaluation, Cisco ended up with a list of 50 megatrends that were put under surveillance to see if future signals would continue to reinforce the identified trends, or if further developments were already in process.
HOW TO ASSESS THE IMPACT OF MEGATRENDS AND DERIVE OPPORTUNITIES FROM THEM?
In a complex world, not all trends happen at the same time, nor do they have an identical impact on the company’s business. Acknowledging this, Drieman and his colleagues at Cisco developed an Impact Grouping map where the identified trends were grouped under six categories based on their anticipated impact on business, and the timeline:

1. Missed the train
2. Are we taking action?
3. Are we preparing?
4. Nice to know
5. Interesting
6. Keep an eye on

The trends were then further mapped into a framework that connects potentially interesting trends together. As an example, maybe the trend of public sector indebtedness combined with the trend of sustainability will lead to a business opportunity for those who can produce green IT solutions for the public sector?

HOW TO COMMUNICATE THE RESULTS OF A MEGATRENDS ANALYSIS?
The results of a megatrends analysis are necessarily strategic in nature, but the analysis effort may be wasted if the messages are buried into a pile of powerpoint slides that is thick enough to exhaust any busy decision-maker up front. Knowing this, Drieman with his team paid specific attention to building fact sheets that were as crisp and digestible as possible:

- What is the trend
- Fact and figures
- Impact on Cisco
- Assessment of disruptiveness

For most of the trends, more information was available in the notes. Also, the reports were available in both ppt and pdf format.

Finally, Joost Drieman points out that there’s ample evidence about global megatrends also provoking subsequent anti-trends, which is something for the trend analysts to bear in mind. Another 2 things to bear in mind is that (1) eventually, all trends are driven by the end customers’ i.e. the consumers’ wants and needs. Hence, even though many companies operate in a b-2-b environment, consumer behavior may have a significant impact on their business, too. And (2) companies have an ongoing strive to be more successful. So they try to optimize productivity and efficiency, would like to distinguish and do things differently (new business models), and study market opportunities. Whatever the most impactful trends are for each company, a genuinely future-oriented corporate intelligence program should be equipped to systematically detect, monitor and analyse them to see how a company could benefit from an emerging megatrend. Communication of the results is crucial for a successful implementation.
For more information, please visit www.globalintelligence.com or contact the GIA representative closest to you:

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