Russia’s Accession to the WTO and its Impact on Her Energy and Commodities Industries

What lies ahead for Russia’s key trading partners in the EU and other foreign players?

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Methodology:
This industry briefing is based on a research combining information from the latest reports, databases, news and GIA’s own analysis. GIA’s analyst team in Helsinki has a track record of more than 10 years in monitoring the Russian market. Our clients include both Western companies needing to understand the Russian market, as well as Russian companies reaching to the west.

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Abbreviations and acronyms

WTO  World Trade Organization
FDI  Foreign Direct investment
Introduction
Introduction

This paper discusses Russia and what lies ahead of its key industries after its future accession to the WTO in the third quarter of the 2012. Today’s key question for the companies either entering the Russian market or strengthening their current position is when to make the decisions: The early birds will bear the risks of not knowing exactly how the markets will evolve, but entering the market only once Russia has secured a sound economic development, might mean that the market entry is done too late.

Most of us know machinery, metallurgy, chemicals and energy are some of Russia’s most important sectors. But how will the key sectors be affected by the country’s accession to full-fledged membership at the World Trade Organization (WTO)? And what lies ahead for Russia’s key trading partners in the EU and other foreign players?

In the following the key things everyone should know about Russia’s accession process are discussed: The benefits for Russia, implications on international trade and impacts on the energy and commodities sector.
WTO and Russia in Brief
A historical WTO deal

- **On November 10, 2011** the Working Party for Russia’s WTO membership approved the accession package for Russia. According to the Working Party the deal “offers a transparent and predictable environment for trade and foreign investment.”

- **Currently 153 out of the 206 countries of the world are members in the WTO.** The organization, formerly known as GATT (General Agreement on Tariffs and Trade), has been working for the liberalization of the world trade since 1948. The key activities include organizing rounds of negotiations to come up with trade agreements and binding frameworks for the member states.

- **The most recent accessions to the WTO** include Viet Nam and Tonga in 2007, Ukraine and Cape Verde in 2008. Along with Russia, Vanuatu, Samoa, Montenegro currently share the same situation in the accession process.

- It’s intriguing that a country like Russia is not yet a WTO member, as most of the industrialized countries already are. Russia’s application to WTO was filed in 1993. In the following presentation, we will go through some of the highlights of the accession process and the key impact of the deal on Russia’s main industrial sectors; energy and commodities.

### Countries currently negotiating their WTO membership:

<table>
<thead>
<tr>
<th>Country</th>
<th>Application date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algeria</td>
<td>1987</td>
</tr>
<tr>
<td>Belarus</td>
<td>1993</td>
</tr>
<tr>
<td>Sudan</td>
<td>1994</td>
</tr>
<tr>
<td>Uzbekistan</td>
<td>1994</td>
</tr>
<tr>
<td>Seychelles</td>
<td>1995</td>
</tr>
<tr>
<td>Kazakhstan</td>
<td>1996</td>
</tr>
<tr>
<td>Azerbaijan</td>
<td>1997</td>
</tr>
<tr>
<td>Lao People’s Democratic Republic</td>
<td>1997</td>
</tr>
<tr>
<td>Republic</td>
<td></td>
</tr>
<tr>
<td>Andorra</td>
<td>1999</td>
</tr>
<tr>
<td>Lebanese Republic</td>
<td>1999</td>
</tr>
<tr>
<td>Bosnia Herzegovina</td>
<td>1999</td>
</tr>
<tr>
<td>Bhutan</td>
<td>1999</td>
</tr>
<tr>
<td>Yemen</td>
<td>2000</td>
</tr>
<tr>
<td>Bahamas</td>
<td>2001</td>
</tr>
<tr>
<td>Tajikistan</td>
<td>2001</td>
</tr>
<tr>
<td>Syria</td>
<td>2001</td>
</tr>
<tr>
<td>Ethiopia</td>
<td>2003</td>
</tr>
<tr>
<td>Libya</td>
<td>2004</td>
</tr>
<tr>
<td>Iraq</td>
<td>2004</td>
</tr>
<tr>
<td>Afghanistan</td>
<td>2004</td>
</tr>
<tr>
<td>Republic of Serbia</td>
<td>2004</td>
</tr>
<tr>
<td>Iran</td>
<td>2005</td>
</tr>
<tr>
<td>Sao Tomé and Principé</td>
<td>2005</td>
</tr>
<tr>
<td>Union of the Comoros</td>
<td>2007</td>
</tr>
<tr>
<td>Equatorial Guinea</td>
<td>2007</td>
</tr>
<tr>
<td>Republic of Liberia</td>
<td>2007</td>
</tr>
</tbody>
</table>
Russia’s national interests as both drivers and barriers for the deal

1. **Need to vitalize the economy through increased competition and consumption.** The growing middle class in Russia perceives foreign brands as higher quality and increasingly prefer e.g. shopping and traveling abroad. To date the demand for domestic goods could have been maintained by high import tariffs and by managing the value of the ruble. However this has not helped Russian products in the export markets, hence creating new jobs and income.

2. **Need to modernize the industrial infrastructure.** The foundation of Russia’s export, the energy and commodities sector, has long been in need for modernization. Foreign companies have already participated in the modernization of the power generation industry (e.g. Enel, E.On, Fortum), gas pipelines (Nord Stream and South Stream) and oil exploration (Shell) but the risks in doing business in Russia and the governments’ drive to protect its share of the profits have still hindered investment in Russia by most companies. For example, even though 20% of world’s forests grow on the Russian taiga, the foreign investments in the paper and pulp production in Russia have been minimal.

3. **The negotiations required various changes in the Russian legislation.** This again required a reform within Russia’s regulatory and political system. In fact hundreds of official meetings were organized in Russia during the 2000’s, in order to discuss how Russian businesses are impacted by the WTO membership.
The Accession Process
Russia’s economical and constitutional crisis - the starting point for the WTO application process

The Russian Federation applied to WTO in 1993. The year was still a time of political instability in Russia, and the WTO membership was a means of promoting international trade and developing country’s economy, which had declined heavily during the early post-Soviet era.

The application process for the WTO membership begins with a request from a candidate country. Thus, despite the fact that some commercial drive and diplomatic pressure from the trading partners precedes the application, the applicants are never invited to apply for a membership. The open door policy enables increased neutrality for the WTO in the negotiation phases and, at least in theory, brings the applying countries on the same starting line.
Russia’s two-pronged national interests caused a delay of nearly 2 decades

Russia’s delayed accession process can be explained by the numerous multilateral and bilateral negotiations.

In 1995, the first multilateral meeting between Russia and WTO’s Working Party took place in Geneva. This was followed by 8 other meetings between 1995 and 1998. There were as many as 5 meetings in 2002 and six meetings in 2003. Between 1994 and 2006 the multilateral round took as many as 30 meetings and 3 drafts of the Report of the Working Party on Russia’s accession to the WTO.

In parallel, Russia carried out numerous bilateral consultations with the most significant trading partners. In March 2006, most of the issues had been resolved and Russia continued negotiations with the US on the liberalization of the goods and services market.

The most relevant discussion topics have included services, trade related intellectual property rights and investment measures protection as well as non-tariff regulation, customs valuation and legislative developments.
Rapid progress after closing bilateral talks

On November 2011 the Working Party was able to come up with the **accession package**. The package discussed mainly tariffs on goods, barriers for the services market, support for agriculture and transparency of legislation.

The package was written once Russia had been able to come into an agreement with its disputes on e.g. service sector with the US and customs issues with Georgia.

Now, Russia should only ratify the accession package by the end of 22 July 2012 and, 30 days from then Russia would become a WTO member. At the time of accession, all the agreed tariffs and commitments on goods, services shall come into full force immediately. Actions on agriculture and legislations will be implemented in the agreed timeline.

<table>
<thead>
<tr>
<th>Event</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application</td>
<td>1993</td>
</tr>
<tr>
<td>Working party negotiations on</td>
<td>1995 – 2011</td>
</tr>
<tr>
<td>trade regime (multilateral)</td>
<td></td>
</tr>
<tr>
<td>market access (bilateral)</td>
<td></td>
</tr>
<tr>
<td>General council or ministerial</td>
<td>2011</td>
</tr>
<tr>
<td>conference adopts accession package</td>
<td></td>
</tr>
<tr>
<td>Ratification of accession package by</td>
<td>2012</td>
</tr>
<tr>
<td>acceding country</td>
<td></td>
</tr>
<tr>
<td>Membership after 30 days</td>
<td>August 2012</td>
</tr>
</tbody>
</table>
Russia’s International Trade
Trade deficit in various segments despite the positive overall trade balance

Since the mid 2000’s the exports of fuels and mining products from Russia have been growing steadily due to the high oil prices, interestingly chemicals and manufactures as well.

The shares of iron and steel, machinery and transport equipment and automotive products out of the overall export have lost their meaning due to sluggish export development.

Russia tends to import goods with higher added value than it imports. The highest growing import goods segments have been fuels and mining products, chemicals, iron and steel and manufactures.
Sectors with a weak trading balance more likely to face challenges in open competition

**Russia's exports in billion Euro**

<table>
<thead>
<tr>
<th>Sector</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fuels</td>
<td>191,1</td>
</tr>
<tr>
<td>Manufactures</td>
<td>60,9</td>
</tr>
<tr>
<td>Chemicals</td>
<td>18,3</td>
</tr>
<tr>
<td>Iron and steel</td>
<td>17,5</td>
</tr>
<tr>
<td>Machinery and transport equipment</td>
<td>11,1</td>
</tr>
<tr>
<td>Automotive products</td>
<td>1,7</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>212,7</strong></td>
</tr>
</tbody>
</table>

The impact of the WTO deal for Russia’s export is going to be close to neutral as the export conditions for Russian products are not going to change significantly.

Imports from Russia’s trading partners are likely to increase due to lower tariffs and reduced entry barriers for the Russian market.

The current negative trading balance in e.g. manufactures, machinery and transport equipment and automotive products indicate Russia’s weak competitiveness in these sectors and hence WTO deal being a potential threat for the Russian companies in these sectors.

**Russia's imports in billion Euro**

<table>
<thead>
<tr>
<th>Sector</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manufactures</td>
<td>142,1</td>
</tr>
<tr>
<td>Machinery and transport equipment</td>
<td>73,0</td>
</tr>
<tr>
<td>Chemicals</td>
<td>23,7</td>
</tr>
<tr>
<td>Automotive products</td>
<td>19,7</td>
</tr>
<tr>
<td>Fuels and mining products</td>
<td>10,0</td>
</tr>
<tr>
<td>Iron and steel</td>
<td>6,7</td>
</tr>
<tr>
<td>Fuels</td>
<td>4,2</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>250</strong></td>
</tr>
</tbody>
</table>

- 50  100  150  200  250
EU27 currently accounts for as much as half of Russia’s exports

The most significant bilateral agreement during the WTO negotiations was done with the EU, Russia’s largest trading partner. EU’s homogenous business legislation, long business traditions with Russia and logistic connections to Russia’s most important economic regions will foremost benefit Russia’s most significant exporting industries such as Fuels and mining products.

- The inhibitors for the export include e.g. the financial slowdown in the Eurozone, new gas projects e.g. in Poland and – in the long term – initiatives promoting energy saving and renewable energy.

+ The factors to increase Russia’s export to Europe include large infrastructure and logistic initiatives such as utilization of new gas pipelines, developing harbors and land transport connections as well as customs initiatives. In addition there are various micro level drivers such as the nuclear policies in individual EU countries.

![Russia's main export partners](chart.png)

EU27 49 %

Others 34 %

Japan 3 %

Ukraine 4 %

Turkey 4 %

China 5 %
Black sheep among the emerging markets

Despite the growing FDI inflow the accumulated stock of FDI as a share of Russia’s GDP has still remained rather low compared to e.g. China or Brazil. The story goes back to the 1990’s when Russia did not attract Foreign Direct Investment (FDI) as its peers in Eastern Europe or other BRIC countries. Things turned out for the better during the early 2000’s as the rising oil prices made Russia’s Oil & Gas industry an irresistible target for e.g. oil exploration multinationals.

There several explaining factors for the relatively low FDI inflow:

- Poor logistic performance (in particular within the customs’ operations)
- Inefficient domestic institutions, corruption
- Volatile, oil-based economy
- Governmental control over certain businesses

The key reason lies however in the prominence of the mining and quarrying sector for the country, which leads to an endless jigsaw of the economy that is almost solely dependent on the movements of the oil price.

FDI is also not sufficiently channeled to other sectors. The government still has a role in various strategic corporations, distorting the healthy competition in the market.
Regions Impacted by the WTO Deal
The winning and losing regions

In the regional development perspective the influence of the energy and commodities industries cannot be neglected: The historical industrial orientation will heavily influence on the prospects of individual regions after the WTO deal as well.

The biggest beneficiaries from lower tariffs in the short term are most likely to be:

A. The oil-rich Tyumen region
B. Economically developed St. Petersburg region

Potential low growth may be expected in the coming years in:

C. The machinery-heavy Ural region
D. Central District (including Moscow) to suffer out of increased competition and job cuts

In addition, there are various investment plans in the oil and gas industry, which may impact on the regional development on a micro level rather than on entire regions: As an example projects in the arctic region or in the far east have strategic priorities nationally.
Russia promotes business in special economic zones

To answer the inevitable demographic and economic changes, the Russian government has been providing support for companies that invest in certain Special Economic Zones (SEZs) since 2005. The zones of importance for the foreign commodity players are:

1. **Technological implementation zones** of Zelenograd (Moscow), Dubna (Moscow Region), St. Petersburg and Tomsk
2. **Industrial and development** zones of Elabug (Tatarstan) and Lipetsk
3. **Port zones** of Krasnoyarsk (Emelyanovo Airport), Ulyanovsk (Ulyanovsk-East Airport) and Seaport of the Khabarovsk Region

As a result of the WTO deal the means of support need to be revised and potentially a need for additional focus regions emerges. The companies first present in the marketplace will most likely also be the first to understand the areas with easier levels of doing business.
Moscow region attracts most of the FDI

Geographically the FDI inflows are rather concentrated. During the end of the latest economic boom in 2006 the Moscow city got as much as 38% of Russia’s FDI. The Sakhalin region got 15% and the Moscow region 10%.

Even today Moscow attracts a large portion of the FDI and ranks in the top 10 most FDI-intensive cities in Europe. The mining and quarrying sector (including oil and gas extraction) account for the majority of the FDI, whereas manufacturing, real estate and business services follow further behind.
Impacts by Key Sector
Immediate Impacts on the Energy and Commodity Sector
Immediate impacts for Russia’s key sectors

Average import tariffs on goods will decrease to about 7.8% from the current 10%. As a result of increased economic activity, the immediate impact of the accession package on Russian GDP is estimated to be relatively small, around +3%. This growth is generated as a result of improved business conditions in the following sectors:

- Goods market
- Agriculture
- Services
- Legislation
Immediate impact on the goods market

The reduction of import and export tariffs as well as on tariff quotas for various products were the key achievements of Russia’s WTO negotiations. In the goods market the aim has also been on the timelines for the annual implementation rates. As an immediate effect the average import tariffs on manufactured goods will decrease to about 7.3% from the current 9.5%.

The initial impact of the membership on the goods market is going to be insignificant. The tariffs have already reduced during the 18-year negotiation process and it will take from 3 to 8 years before the all the commitments for Russia come in full force. The Russian players that benefit the most, are the well-established exporters of goods that already historically have low export tariffs. Their position will improve in particular, if and when the Russian ruble will get cheaper in proportion to the change of tariffs in general.
Immediate impact on agriculture and forestry

In agriculture and forestry Russia made one of its biggest admissions, but the local bureaucracy and various tariff quotas and implementation timelines are about to dampen the emerge of foreign players.

The import tariffs on agricultural goods however will now drop to 10,8% from the current 13,2%. In addition, Russia made significant concessions in allowing more foreign market access within the sector and in complying with various sanitary rules. Within the WTO fair levels of domestic support for agriculture are allowed, which will be the case with Russia as well.

With EU Russia signed a bilateral deal on certain grades of timber. EU-based players will be now be able to source wood from Russia under a certain quota without any additional tariffs or taxes. However, the increase in bureaucracy involved in the cross-border transactions may drive smaller and less experienced companies out of the market: Each business agreement between a buyer and a seller will need to be reported to the EU Commission and the respective Russian authority, in order for them to track when the quota level is reached.
Immediate impact on services

The growth in service sector is expected to transform Russia’s economy. The service sectors to look at include in particular telecommunication, insurance, banking and transport services. Market access for services has been one of the key areas in the negotiations and this has also been one of the factors that has delayed the negotiations in recent years. Even in the final agreement Russia has still banned access for the foreign players to enter to no less than 40 service sectors in the Russian market.

It is a general a concern that Russian companies will gain competitive advantage and the ban can be used as tool to protect national suppliers from foreign competition in practically any sector. Some of the limitations persist only for the transition time: for example, foreign subsidiaries may not be able to enter the market without partnering with a Russian player, which may create additional costs for foreign companies.
Immediate impact on laws and regulations

The June 22 is going to be a significant day for the Russian political and juridical system, as the WTO agreement requires that the applying nation ratifies all the rules in the deal before joining.

In a sense Russia loses some independence in its domestic and foreign affairs but again gains as a fully pledged WTO member. Indeed, Russia’s lengthy WTO accession process can be explained partly by multilateral and bilateral negotiations but also by the fact that the negotiations required various changes in the Russian legislation, which again required a reform within Russia’s regulatory and political system.
Midterm impacts specific industrial sectors is going to be heavily polarized

As Russia’s Oil & Gas exporters are practically free of trading barriers already the direct impact of the WTO deal is insignificant for them. But within other industrial sectors changes can be expected. Below are some of the WTO deal’s estimated impacts on the annual growth rates of selected industries in Russia:

<table>
<thead>
<tr>
<th>Industry</th>
<th>Ferrous</th>
<th>Non-ferrous</th>
<th>Chemicals</th>
<th>Coal mining</th>
<th>Construction materials</th>
<th>Food and light industries</th>
<th>Machine building</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metallurgy</td>
<td>+25%</td>
<td>+15%</td>
<td>+10%</td>
<td>+6%</td>
<td>- 7%</td>
<td>- 7%</td>
<td>- 12%</td>
</tr>
</tbody>
</table>

Russia’s trading partners not currently have that that many import duties for the goods produced in Russia. Only for some of the metallurgy and chemical products there are, and the termination of these can be seen as growth drivers for the Russian producers of steel and chemical intermediates.

And as these are energy intensive industries, the growing exports here mean increased demand for energy, which again increases utilization of the coal-based power generation industry.

The industrial sectors more vulnerable for open competition with western and eastern companies will suffer out of the WTO deal in the short term.

International Labor Organization (ILO) foresees that during the transition period as much as 15 000 jobs will be lost in the light industries alone. As these sectors are significant end-users of energy and commodity products as well, it is essential for Russia to try revitalize this part of the economy.
Long term impacts

The WTO deal and various other factors are indicating growth for Russia’s energy and commodity sector:

1. OECD foresees that Russia will keep hitting new records in both imports and exports of goods and services in 2012 and 2013

2. Oil price to develop above the general inflation levels due to increasing demand and decreasing supply of economically available oil wells globally

3. In current political environment the minimal assumption is that the FDI inflow will follow the positive oil price trend

The long term impact scenario must be a combination of forecasts, assumptions and certain level of understanding about Russia’s trading profile and the impacts of the WTO deal on its strategic industries
Two main scenarios on the core sectors

Model calculations show that in the years 2012 – 2014 the Russian GDP will increase due to decreased prices and increased private spending. Only towards the end of the decade the lower barriers for trade have led to significant increase in competition and jobs. There are two main scenarios which are outlined below:

**Positive scenario:**
- High global demand for commodities
- Export income + vital domestic demand
- Foreign and domestic investments
- Competitiveness

**Negative scenario:**
- Low demand for commodities
- Less spending and investments
- Escape of capital
- Slow growth

Based on Russia’s current position and the given forecasts, the outlook is more positive than it is negative.
The largest companies in Russia include among the leading Oil & Gas and mining companies the national railway operator (Russian Railways JSC), power utility (Federal Grid), banks and telcos. However, the top league is dominated by the exporters of Oil & Gas and metals.

### Leading Russian Oil & Gas Exporters:

- **Lukoil** – Oil & Gas
- **Gazprom** – Natural gas
- **Rosneft** – Oil
- **TNK-BP** – Oil
- **Surgutneftegaz** – Oil
- **Novatek** – Natural Gas
- **Tatneft** – Oil & Gas
- **Slavneft** – Oil & Gas

### Leading Russian Metallurgy Exporters:

- **Novolipetsk Steel**
- **Magnitogorsk Iron and Steel Works**
- **Evraz**
- **Severstal**
- **Norilsk Nickel**
- **RusAl**
The companies to look at

The strategic moves of the Russian top exporters are going to be something to follow in the midterm. As a result of the WTO deal the companies may increase their presence in other markets, carry out major investments or sell minority stakes to foreign investors.

Potential strategic actions of the key exporters, as the result of the WTO deal:

- Capital expenditure for the modernization of assets
- Mergers and acquisitions to access new markets
- Lobbying for pro-Russian laws and standards
- Downstream integration for higher margins
- Further investment in R&D and technology
- Investor searches for further privatization
- Marketing actions
The key takeaways

✔ Russia’s accession to the WTO is not about to change the global economy.
  ✔ Russia’s share in world total exports of merchandise is less than 3% and less than 2% of imports.

✔ The companies in the EU27 area to benefit.
  ✔ Improved business infrastructure, the robustness of the multilateral and bilateral agreements and the falling tariffs to ease business across sectors.

✔ Russian manufacturing industry to suffer in the midterm.
  ✔ Minimal impact on the nation’s economy.

✔ The inflows of the FDI can be expected to increase in the long term.
  ✔ However in the mid term the key driver for FDI is going to be the price of oil, not the regulatory development.

✔ The regions to benefit in the mid term are the Tyumen and St. Petersburg regions.
  ✔ The most of the negative impact is going to hit the Urals and the Moscow region. However these will also be the ones to benefit the most in the long term, as a result of increased economic activity and rising FDI.

✔ The market is about to change the most for the European companies operating in the energy and commodities sectors.
  ✔ Oil & Gas, metallurgy and petrochemical processing. The tier 2 players in these sectors are potentially standing in front of a new boom, similar to the one in the early 21st Century, with the only difference that the competition with the locals is going to be more open. Thus the Russia strategies’ of technology providers, manufacturers of investment goods and the industrial EPC players will be something to look at.
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- Logistics & Transportation
- Consumer & Retail
- Automotive
- Construction & Property Development
- Telecommunication, Technology & Media
- Financial Services
- Chemicals
- Private Equity
- Pharmaceuticals & Healthcare

Industry Practices
- Automotive
- Chemicals
- Construction & Property Development
- Consumer & Retail
- Energy, Resources & Environment
- Financial Services
- Private Equity
- Logistics & Transportation
- Manufacturing & Industrial
- Pharmaceuticals & Healthcare
- Telecommunication, Technology & Media

Functional Practices
- World Class Market Intelligence
- MI for Strategic Planning
- MI for Marketing & Sales
- MI for Product & Innovation Management
- MI for Supply Chain Management
- M&A and Partnering
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- **Intelligence Strategic Analysis**: Analytical insight and advisory, enabling you to compete more effectively and grow into new opportunities
- **Intelligence Rapid Response Research**: Valuable information about your markets and industry, on-demand around the world
- **Intelligence Plaza®**: Robust and scalable software that enables full control of the intelligence process
- **Intelligence Best Practices**: A suite of consulting services, events and online resources that help you set up and develop world class intelligence programs
Strategic market intelligence and advisory for energy and utilities

GIA has a proven track record of providing business critical information for the energy, resources and environmental industries. Partner with us to understand, compete and grow in international markets:

Understand How significant is the market in value and volume?

Compete Which are the top players that share the market?

Grow What is the forecasted market growth?
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