

# Journal of Competitive Intelligence and Management

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## Special Issue *on Country-Specific Competitive Intelligence*

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# Journal of Competitive Intelligence and Management

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

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# Competitive Intelligence in Korea<sup>1</sup>

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## Executive Summary

This article investigates how competitive intelligence (CI) in Korea has evolved over the years and will evolve in the future. In doing so, this article demonstrates that environmental forces and public intelligence have been the main drivers of CI needs, practices, and developmental stages in Korea. Leading Chaebol groups in Korea started building formal CI programs in the early 1980s, and have continuously improved their CI practices since. Relative to corporate CI practices, the infrastructure of CI in Korea is generally considered to be weak, and this is probably because of the secretive nature of CI practices in Korean companies. There are many challenges to the future development of CI in Korea, such as bringing

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underground CI to the public domain, improving the image of CI, and expanding the CI infrastructure. This article also discusses an important implication of national environmental context, such as national culture, for CI theories and practices.

## Key Words

competitive intelligence, Korea, drivers of CI development, stages of CI development, Korean companies.

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## Introduction

In recent years, Korean companies have faced increased environmental uncertainty due to enhanced globalization and competition, and so have had a greater need to understand their environment more accurately for survival and success. To meet this need, many Korean companies, especially Chaebol groups<sup>2</sup>, have adopted some type of process for environmental understanding and uncertainty reduction. Although they do not necessarily call this process competitive intelligence (CI), many Korean companies have made efforts to collect, analyze, disseminate, and utilize information on external environments (e.g., competitors, customers, technologies, governments, economies, etc.) for improved decision-making and implementation of strategy.

Many people have recently been startled at the competitiveness of some major Korean companies and the economic miracle of Korea. In 2003, 12 Korean companies belonged to Fortune 500 companies worldwide and Korea became the 12<sup>th</sup> largest economy in the world – a significant development considering the fact that this country had one of the smaller economies only 30 to 40 years ago (Hong, 2004). While the sources of this successful transformation may include government

support and luck, a significant contributing factor has also been the competitive intelligence capability of Korean companies which has allowed them to understand and cope with their changing environment. Given that CI provides companies with a cornerstone for effective strategy development, decision-making, and execution (Behnke & Slayton, 1998), developing a core competence in CI has been a primary driver fostering the competitiveness of the Korean economy in general, and many Korean corporations in particular.

From this perspective, we believe it to be important to examine how CI in Korea has evolved and will evolve in order to understand the present and future success of Korean companies more clearly. However, little research has been done on the overall development of CI in Korea, with the exception of some books, papers and newspaper articles, most of which treat CI in a piecemeal fashion (e.g., Yoon, 1988; Lee, 2001; Lee 2002). Therefore, this article aims to examine the overall development of CI in Korea, based on the CI concept that originated from North America, and to introduce a robust analysis of Korean CI to the body of CI literature.

This article is composed as follows. The first few sections discuss the key drivers and the stages of CI development in Korea and the CI infrastructure in Korea, involving CI consultancies, communities, press releases, and champions. The next few sections describe the current status and the unique facets of CI in Korea. This is followed by a discussion elaborating on some key challenges facing Korean CI and the future development of CI in Korea. The final section discusses some key conclusions and implications of this research.

## Drivers of CI Development in Korea

Like other management practices, CI is influenced by country-specific environmental factors (Tao & Prescott, 2000), and therefore it is important to examine what has driven CI in Korea to understand its development more clearly. We believe that two key sets of drivers - environmental forces and public intelligence - have influenced the development of CI in Korea most strongly.

## Environmental Forces

Environmental forces include political/legal, economic, technological, socio-cultural, and industry forces, such as competitors, customers, labor unions, and suppliers (Hill & Jones, 2001). As these environmental forces change, firms' CI needs (what) and CI practices (how) are likely to change. Among these forces, political/legal, economic, industry, and industry-technological forces tend to influence *CI needs*, whereas socio-cultural and information-technological forces tend to influence *CI practices*. Table 1 summarizes how various environmental forces in respective time periods have changed and how CI needs and practices have changed over the years as a consequence. As shown in Table 1, Korea is an excellent case in point demonstrating how changes in environmental forces lead to changes in CI needs and practices, since it has experienced dramatic changes in environmental forces within a short period of time.

During the 1960s and 1970s, under a military regime, Korea implemented government-led industrial plans for economic development designed to rebuild the nation from the destruction of the Korean War in the early 1950s (Kong, 1993). To make these reconstruction initiatives successful, the government and firms had to cooperate. Korean firms needed the government's help for new business opportunities and resources, while the government needed corporate cooperation to optimize economic development. Hence, strong government-business ties emerged to facilitate these mutual interests, a dynamic which greatly benefited firms with close connections to government officials who were in positions to deliver various business opportunities and benefits (Kim, 1999). During this period, Korea had a relatively closed economy and a small market with limited competition, although Chaebol groups increased significantly in number and size during this period. Since the domestic market was still relatively small, the government pushed to increase export for further economic development. In response to this, many Chaebol groups established general trading companies to facilitate their exporting goals, starting from the mid 1970s (Yoon, 1988). At this time, Korea had few leading industrial technologies and was far from being able to derive competitive advantage from technological leadership. Culturally, Koreans had very strong human relations by blood, school, and region,

and thus experienced great difficulty in refusing an improper request or offer from someone close (Donga Daily Newspaper, 2002). For this reason, many people in positions of power across Korean society were open to solicitation and corruption. This social ailment also stemmed partly from poor legislation and enforcement of the law.

As a result of these environmental forces, up until the 1970s, Korean firms had key CI needs of monitoring government policies/intentions, politics, and key figures for (i) information required to support lobbying, and (ii) to understand foreign markets to support export objectives. In pursuing informal CI, Korean firms before the 1980s, relied mostly on undisclosed information derived from personal connections with little ethical constraint. Additionally, CI in this period did not have the benefit of extensive information technologies.

In 1980, a second military government stepped in after two decades of rule by the incumbent military party. The policy priorities of this new regime included the suppression of the mass media and industry rationalization that involved the disposition and the enforced restructuring of industries and businesses (Kong, 1993). It soon became imperative for companies to form a new set of connections with the government and to develop political networks, underscoring once again the business value of strong government-business ties based on mutual interests (Monthly Mal, 1992). During the 1980s, the economy became more open and, along with export markets, domestic markets became increasingly larger and more competitive. Additionally, there was a large construction boom due to the 1988 Olympics. Other significant forces in the late 1980s were the activation of the stock market in Korea and extensive labor strikes (Kim, 1989). These forces prompted firms to become more sensitive to external environments, which included monitoring key macro-environmental variables such as competitors and labor unions. During this period, mainframe computers and telecommunication technologies, such as telex, fax, and phone were used, but Korea still had limited access to leading industrial technologies and was not in a position to derive a competitive advantage from technological leadership. In the 1980s, the culture of Korea remained rather unchanged from previous decades.

Table 1: Environmental Forces Driving CI in Korea

Environmental Forces	Up to 1970s	1980s	1990s	Early 2000s
<b>Political/ Legal</b>	<ul style="list-style-type: none"> <li>• 1st military gov't dictatorship</li> <li>• Strong gov't-business ties &amp; cooperation</li> <li>• Poor legislation &amp; enforcement</li> </ul>	<ul style="list-style-type: none"> <li>• 2nd military gov't dictatorship</li> <li>• Suppression of mass media &amp; 'Chaebols'</li> <li>• Strong gov't-business ties</li> <li>• Poor legislation &amp; enforcement</li> </ul>	<ul style="list-style-type: none"> <li>• Democratic civil gov't</li> <li>• Moderately strong gov't-business ties</li> <li>• Improved legislation &amp; enforcement</li> </ul>	<ul style="list-style-type: none"> <li>• Reforming civil gov't</li> <li>• Fight against corruption &amp; injustice</li> <li>• Medium-low gov't-business ties</li> <li>• Moderately strong legislation &amp; enforcement</li> </ul>
<b>Economic</b>	<ul style="list-style-type: none"> <li>• Industrial policies</li> <li>• Closed economy/ small market/high growth</li> <li>• Chaebol' growth</li> <li>• Export orientation</li> </ul>	<ul style="list-style-type: none"> <li>• Industry rationalization</li> <li>• Semi-open economy/ high growth</li> <li>• Domestic, export focus</li> <li>• Construction boom - '88 Olympics</li> </ul>	<ul style="list-style-type: none"> <li>• Privatization, deregulation</li> <li>• Moderately global, open/WTO entry/ high growth</li> <li>• Increased labor costs</li> <li>• Financial crisis, late 90's</li> </ul>	<ul style="list-style-type: none"> <li>• Highly global, open/ FTAs/moderate growth</li> <li>• Moderately large market</li> <li>• Service/high-tech focus</li> <li>• Moderately high labor costs</li> </ul>
<b>Industry/ competition</b>	<ul style="list-style-type: none"> <li>• Low competition</li> <li>• Export market focus</li> <li>• General trading companies</li> </ul>	<ul style="list-style-type: none"> <li>• Growing competition</li> <li>• Domestic &amp; export markets</li> <li>• Stock trading companies</li> <li>• Extensive labor strikes/disputes</li> </ul>	<ul style="list-style-type: none"> <li>• Fairly intense competition</li> <li>• Domestic, export &amp; foreign markets</li> <li>• Foreign competitors</li> <li>• Sophisticated customers</li> <li>• Fairly high uncertainty</li> </ul>	<ul style="list-style-type: none"> <li>• Intense competition</li> <li>• Global markets</li> <li>• Large global firms</li> <li>• Highly sophisticated customers</li> <li>• High uncertainty</li> </ul>
<b>Technological</b>	<ul style="list-style-type: none"> <li>• Few industrial technologies</li> <li>• Few computers/IT adoption</li> </ul>	<ul style="list-style-type: none"> <li>• Limited industrial technologies</li> <li>• Mainframe computers/telecom development</li> </ul>	<ul style="list-style-type: none"> <li>• Growing industrial technologies</li> <li>• Personal computers/ the Internet/IT/telecom growth</li> </ul>	<ul style="list-style-type: none"> <li>• Fairly high industrial technologies</li> <li>• Computers/Internet/IT/ telecom explosion</li> </ul>
<b>Socio-Cultural</b>	<ul style="list-style-type: none"> <li>• Strong human relations</li> <li>• High tolerance for corruption</li> <li>• Closed, secretive</li> </ul>	<ul style="list-style-type: none"> <li>• Strong human relations</li> <li>• High tolerance for corruption</li> <li>• Closed, secretive</li> </ul>	<ul style="list-style-type: none"> <li>• Strong human relations</li> <li>• Fairly high tolerance for corruption</li> <li>• Closed, secretive</li> </ul>	<ul style="list-style-type: none"> <li>• Diminishing human ties &amp; relations</li> <li>• Medium-low tolerance for corruption</li> <li>• Rather closed, secretive</li> </ul>
<b>Key CI Needs</b>	<ul style="list-style-type: none"> <li>• Monitoring gov't policies, politics and key figures for lobbying</li> <li>• Understanding export markets</li> </ul>	<ul style="list-style-type: none"> <li>• Monitoring gov't policies, politics and key figures for lobbying</li> <li>• Domestic, export markets</li> <li>• Competitors &amp; labor movements</li> </ul>	<ul style="list-style-type: none"> <li>• Monitoring gov't policies, politics, and key figures for lobbying</li> <li>• Domestic, foreign markets for export &amp; FDI</li> <li>• Competitors, customers, technologies, labor, industry, economic trends</li> </ul>	<ul style="list-style-type: none"> <li>• Monitoring gov't policies, politics and key figures to an extent</li> <li>• Domestic, global markets for global operations</li> <li>• Global competitors, customers, technologies, regulations, labor, industry, economic trends</li> </ul>
<b>Key CI Practices</b>	Closed>>>Open Little IT/telecom Low ethical standard	Closed>>>Open Limited IT/telecom Low ethical standard	Closed>>Open Fairly high IT/telecom Low-Moderate ethical standard	Closed>Open High IT/telecom Moderate ethical standard
<b>Key Forces</b>	Political>Economic, Industry, Technology	Political>Economic, Industry, Technology	Political>Economic, Industry, Technology etc	Political>Economic, Industry, Technology etc

Based on the discussions above, it is fair to say that Korean firms' key CI needs during the 1980s included monitoring government policies/intentions, politics and key figures for information and lobbying, understanding domestic and export markets, and understanding competitors and labor movements. In addition, Korean firms practicing CI in the 1980s relied heavily on personal, human sources for undisclosed information with limited use of information technologies and had a fairly low ethical standard.

In the 1990s, Korea experienced three civil governments in different time periods after almost three decades of military dictatorship (Son, 2003). With a civil government in power, the importance and incidence of government-business ties started diminishing to a certain extent but was still moderately strong due to past history. Another influence diminishing the importance of government-business ties was the fact that legislation was beginning to be more strictly and rationally enforced. During this period, many industries were deregulated and privatized, and the economy as a whole became largely open with the emergence of the World Trade Organization (WTO) and the increased globalization of markets (Kim, 2004). Labor costs went up significantly due to extensive labor shortages and strikes, so many Korean firms started investing overseas and internationalizing their business operations. At the same time, however, more foreign firms began investing in Korea to exploit its substantially growing market. Korea also went through a financial crisis in the late 1990s, which revealed the criticality of environmental understanding and risk management for firms and resulted in government-led restructuring of industries and companies. With increased globalization, deregulation, and privatization, Korean firms faced moderately intense competition and environmental uncertainty. As Korean firms lost their global competitive advantage in labor-intensive products during the 1990s, they had to shift their attention to technology and knowledge intensive products and services (Kim, 1995). Also, information technologies, including the Internet and computer systems, grew significantly during this period, which encouraged customers to become more sophisticated and knowledgeable about products and services. In the 1990s, Korea experienced several changes along its socio-cultural dimension such as the erosion of the

importance of traditional nuclear families, growth in wealth, reduced gender bias, and civil governments. Despite these broad macro-environmental changes, the extent of change in human relations and tolerance for corruption, in particular, was believed to be relatively small (Im, 1994).

From the discussions above, we can make the following points. First, the key CI needs for Korean companies in the 1990s involved monitoring government policies, politics and key figures, understanding domestic markets and foreign markets for export and FDI, and understanding competitors, customers, technologies, labor unions, and industry/economic trends. Second, in practicing CI, Korean firms during the 1990s seemed to rely on undisclosed information through personal relations much more than open information, although they utilized open information more than in the past with a fairly extensive use of information and communication technologies.

Starting from the early 2000s, a reforming civil government has pursued political/legal and social reform by fighting against chronic corruption and injustice, breaking down government-business ties, and enacting and enforcing laws more strictly and rationally than previous regimes (Kim, 2003). The economy has now become much larger in size and more open with few barriers to trade and investment. Korean markets have become highly global and competitive but labor costs have also risen significantly. For these reasons, it has become a matter of survival for many Korean companies to extensively globalize their business activities to exploit country differences and worldwide markets. Conversely, a large number of foreign companies have also moved into Korea due to its enlarged market (Kim, 2004). As China is catching up rapidly to Korea even in some key industries, Korea has been forced to develop and rely on advanced industrial technologies for its future survival and success (Kim, 2001). In addition, information and communication technologies have also been developed and used extensively both worldwide and in Korea. In the early 2000s, Korea began experiencing a noticeable change along its socio-cultural dimension in terms of tolerance for corruption, which may have an important implication for future CI practices. As the new government pursues political, legal and social reform, the citizens of Korea are becoming less tolerant of corruption and injustice across society.

Furthermore, as the economy advances with a society that is becoming more individualistic, the imperative of being 'connected' to established institutions is still a very powerful business force but one that is steadily weakening.

The above discussions enable us to make the following points. First, Korean companies in the early 2000s generally have key CI needs of monitoring global markets and trends, understanding global competitors, customers, technologies, regulations, labor, industry and economic trends. Monitoring government policies, politics, and key government figures is still an absolute imperative but is declining in relative importance as a primary CI need. Second, in the early 2000s, Korean companies still seem to rely on undisclosed information more than open information but have adopted a somewhat higher ethical standard to guide this reliance. This means that in conducting CI, they tend to utilize personal, human sources more than the media, the Internet, and other sources.

In our discussions above, we show that several environmental forces have been important drivers of CI in Korea. It is particularly interesting to note that different forces have been primary drivers of CI development in different time periods. Figure 1 demonstrates this phenomenon. During the 1960s through the 1980s, understanding political forces was the dominant CI need for Korean companies since military governments were in

direct control of the economy and businesses, whereas economic, industry, and technological intelligence was relatively low in importance. However, in the 1990s, the relative importance of political intelligence declined due to the emergence of three consecutive civil governments, and the rising impact of economic, industry, and technological forces as a result of globalization and the attendant competition. In the current era, economic, industry, and technological forces have become relatively more critical than political forces for Korean firms to deal with as government-business ties break down and the reforming government projects greater transparency.

## Public Intelligence

Intelligence in the public sector is another important driver of CI in Korea. According to D. Kim (2002), the outset of modern intelligence in Korea was known to be "Je-Kook-Ik-Moon-Sa" established in 1902 by King Kojong. This organization with 61 agents collected information on key government figures, political offenders, and foreign diplomats and spies, and provided it directly to the King.

However, more systematic public intelligence in Korea did not begin until after independence in 1945 (Kim, D., 2002). After independence, Korea built military forces with the assistance of the United States and

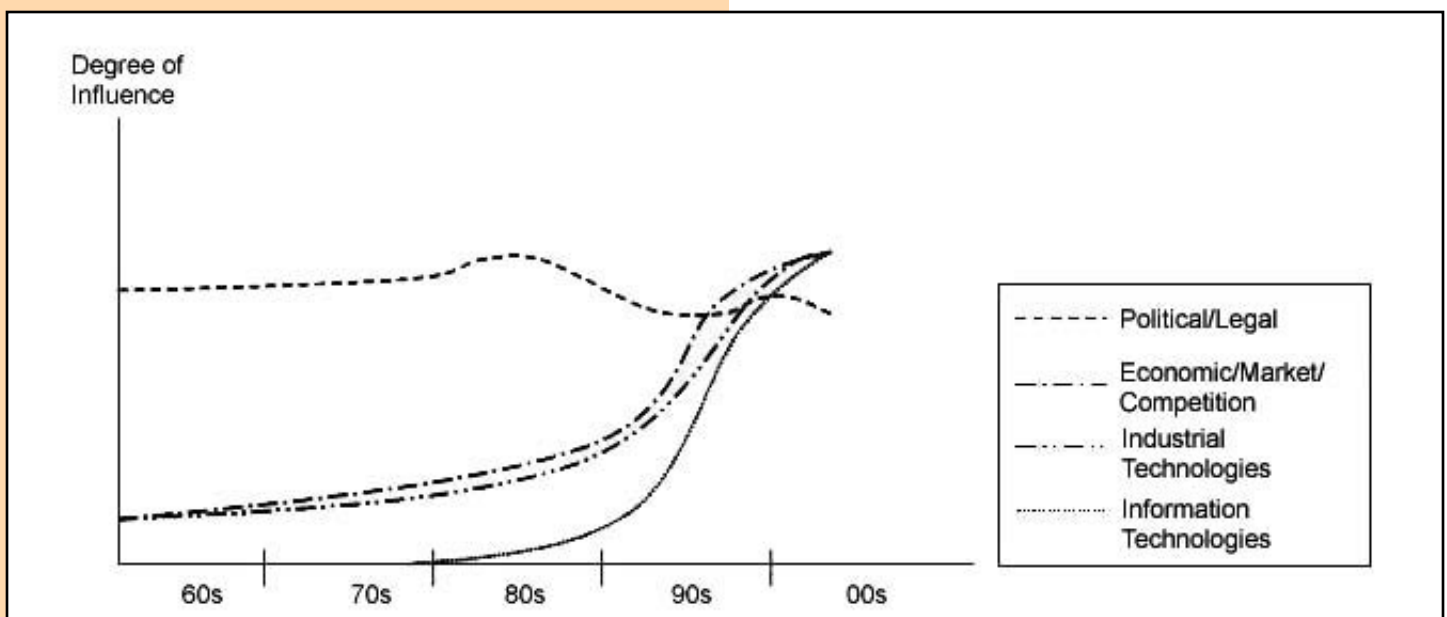


Figure 1: Influence of Environmental Forces on CI in Korea

created the Army Intelligence Center at Army Headquarters. In fact, this center became the real origin of modern intelligence in Korea. The center provided a basis for current military intelligence in the sense that it became the predecessor of the Defense Intelligence Command and Defense Security Command - two of the key agencies of today's military intelligence in Korea - under the Ministry of National Defense. It also provided a human resource pool for national intelligence in Korea as discussed below.

Another landmark event in the history of public intelligence in Korea occurred in 1961 (Kim, D., 2002), when President Junghee Park and his assistant, Jongpil Kim, who were both former agents of the Army Intelligence Center, created the Korea Central Intelligence Agency (KCIA). The creation of this agency had some important implications. KCIA was the first intelligence agency in Korea established at the national level, and, with this agency, Korea started systematically collecting information on foreign countries. This agency was later transformed into the National Security Planning Agency in 1980 and the National Intelligence Service (NIS) in 1997. The missions of NIS ([www.nis.go.kr](http://www.nis.go.kr)) include: (i) collecting, analyzing, and distributing information on foreign countries and domestic security; (ii) maintaining documents, materials, and facilities related to the nation's classified information; and (iii) investigating crimes affecting national security.

In addition to the military and national intelligence units described above, there are other civil ministries in Korea related to public intelligence and security, including the Ministries of Unification, Justice, Government Administration and Home Affairs, and Foreign Affairs and Trade. Among various organizations, the Korea Trade-Investment Promotion Agency (KOTRA)<sup>3</sup> under the Ministries of Foreign Affairs and Trade, like JETRO in Japan, is one of the better-known agencies commonly linked with public intelligence because of its systematic collection and analysis of information on trade and investment-related environmental elements of foreign countries.

Public intelligence in Korea has influenced CI in Korea in several important ways. First, public intelligence has provided important sources of CI professionals<sup>4</sup> and methodologies for firms in Korea. For example, many of the first generation of CI professionals in Korea originated from military intelligence

organizations, and some of the current key CI professionals in group companies, such as Samsung and LG, came from the National Intelligence Service and government organizations. Second, public intelligence has influenced people's views of CI in Korea both positively and negatively. A positive influence is that most Koreans are receptive of intelligence and understand its importance since Korea is still confronting North Korea and has gone through some major wars in the Korean Peninsula in relatively recent history. A negative influence is that many Koreans tend to perceive CI with negative connotations around secrecy and spying - an image more properly associated with spy movies and novels. Finally, public intelligence also has influenced CI practices in Korea both positively and negatively. Some large Korean companies adopted a formal CI function relatively early by employing military and national intelligence officers, but most of these companies have treated CI primarily as an underground activity, hiding CI units and professionals from the public and focusing more on collecting secrets or undisclosed information, as described in the next section.

## Developmental Stages of CI Practices in Korea

Based on the above discussions of the drivers of CI in Korea, we investigate in this section how CI practices of some leading Chaebol group companies in Korea have developed over the years.

Up to the 1970s, group companies in Korea did not have any formal CI (*Monthly Mal*, 1992). Instead, they relied on informal CI, utilizing senior advisors or executives who were mostly ex-high-ranking civil servants or intelligence officers to collect primarily undisclosed information, as needed, based on their personal networks. During this period, companies in Korea seemed to have narrow topics for informal CI which focused on primarily domestic political circles, including politics, government policies, and key figures for lobbying, because almost all of the critical information resided in the government. We believe that this informal CI had a low ethical standard, considering the socio-cultural environment and poor legal systems in Korea at that time. Table 2 summarizes these observations.

Table 2: Development of CI practices in leading Chaebol groups in Korea

	Up to 1970s	1980s	1990s	Early 2000s
<b>CI model</b>	Informal CI	Emerging formal CI	Developing formal CI	Developing formal CI
<b>CI unit location</b>	None	Group HQs Subsidiary	Group HQs Subsidiary	Group HQs Subsidiary
<b>Information collection entity</b>	Individual	CI unit Subsidiary-wide	CI unit Group-wide Subsidiary-wide	CI unit Group-wide Subsidiary-wide
<b>CI topics</b>	Narrow	Medium	Moderately broad	Broad
<b>CI area focus</b>	Domestic	Domestic Export	Domestic Moderately global	Domestic Global
<b>Computer/IT /Internet use</b>	Little	Limited	Rather extensive	Moderately extensive
<b>Information source/type</b>	Closed>>>Open	Closed>>>Open	Closed>>Open	Closed>Open
<b>Extent of analysis</b>	Little	Limited	Limited/Moderate	Moderate
<b>Ethical standard</b>	Low	Low	Low/Medium	Medium

In the 1980s, formal CI emerged at both the subsidiary and group levels of leading Chaebol groups in Korea (Yoon, 1988; *Monthly Mal*, 1992). General trading companies, which had been created from the mid 1970s by Chaebol groups, such as Samsung and Daewoo, started establishing formal CI programs from the early 1980s (Yoon, 1988). These subsidiaries collected information on moderately broad topic areas, including domestic suppliers, foreign export markets, regulations, politics, economic trends through human and other sources. They became important sources of information for many group companies in Korea at that time. Furthermore, by the mid 1980s, many of the general trading companies adopted monitoring systems wherein monitors, dispersed worldwide, collected private and public information for their companies as a whole (Sung, 1995). Along with these monitoring systems, they instilled the intelligence mindset and culture in their organizations, adopted on-line information systems, and built intelligence report systems to improve their CI programs.

Similarly, formal CI units at the group level were

also established from the early 1980s (*Monthly Mal*, 1992). As the second military regime started cracking down on the mass media, rationalizing industries, and restructuring the Chaebol groups, group companies were in desperate need of information on political and legal circles, government policies, and the new connections with the government in order to survive without any harm. This need for information reached a peak when the Kookjae Group, a top 7 Chaebol group, was dissolved in 1985 by the government (*Monthly Mal*, 1992). Group CI units primarily collected undisclosed information on political and legal circles, government policies, and new connections for lobbying based on personal human networks. This intelligence was reported directly to group CEOs and key senior executives. These CI units at the group level functioned very secretly without disclosing their existence to the public, and in fact they hid themselves even from their fellow organizational members (*Monthly Mal*, 1992).

During the 1990s, CI grew significantly at both the subsidiary and group levels in leading group companies in Korea. With activation of the Korean

stock market in the late 1980s, stock-trading companies and related economic research institutes of many Chaebol groups more or less replaced general trading companies as the important sources of information for these groups in the early 1990s (*Monthly Mal*, 1992). These stock-trading companies systematically collected information on politics, economics, industry players and trends, domestic and global markets, and others for effective decision-making.

At the group level, leading Chaebol groups started employing group-wide information network systems in 1989 through 1991 in which all employees or monitors from domestic and overseas subsidiaries and research institutes could enter, retrieve, and peruse information on fairly broad topics (Sung, 1995). The examples of these systems included 'TOPICS' by Samsung, 'TOBIS' by LG, and 'KICINS' by Kolon (Sung, 1995). Such systems improved dramatically from the mid 1990s with moderately extensive use of intranet, Internet, and related information technologies. Aside from these group-wide intelligence network systems, group CI units collected mostly undisclosed and high-grade information on key areas, including government policies, politics, economics, and other group companies through human and other sources and networks (*Monthly Mal*, 1992). This information was shared primarily among key executives at the group and subsidiary levels. During the 1990s, information technologies were integrated into CI rather extensively for collecting public information, and reliance on global information also became higher with increased globalization.

In the early 2000s, CI in leading group companies in Korea has increasingly become more sophisticated with a network of group and subsidiary CI units. These companies now have broad CI needs, covering both domestic and global environments. Today, information and telecommunication technologies have been integrated into the CI process fairly extensively (*Korea Economic Newspaper*, 2003). As a result, reliance on public information has increased rather significantly, while reliance on undisclosed information, although still very high, is declining in relative importance. Similarly, relative to the use of other non-human sources such as the mass media and the Internet, the use of human sources is still very high but declining. Leading companies in

Korea have recently placed more emphasis on analysis than in the past, but they still focus disproportionately on collection rather than analysis in their CI process. Finally, owing to the new government's pursuit of political/legal and social reforms for the last few years, the ethical standard of leading group companies in conducting CI has improved to a certain extent.

## CI Infrastructure in Korea

To understand the overall development of CI in Korea more completely, we need to look at the infrastructure of CI in Korea, which is comprised of CI consultancies, communities, education and research, press coverage, and champions.

### CI Consultancies

There have been many small CI organizations supporting CI in Korea from different angles. First of all, CI consulting and training organizations include United Consulting (1983-1995), Executive Consulting (1990s), IBS Consulting, Global Benchmarking Center of Korea Management Association, 3mecca, Korea Institute of Science and Technology Information, and other international companies like ACNielsen Korea.

Among these organizations, by far the most influential organization for CI development in Korea has been United Consulting that was created in 1983 and merged into IBS Consulting in 1995 ([www.ibs.co.kr](http://www.ibs.co.kr)). Since United Consulting opened the Academy of Industry Intelligence in 1983, this academy has provided a 1-week CI program to over 2,500 people for the last 20 years. This program has provided a valuable opportunity for CI professionals to meet and maintain their connections. Unfortunately, this academy has been dormant since 2002.

In addition, CI service companies have significantly increased in number and have been fairly active since the mid 1990s. These companies include Korea Economic Research, CIB Communication, Wiseinfonyet, Naeil Shinmoon, Iquick, Infocast, Synapsoft, Internet Metrix, Sun & Moon Consulting, Venturetopia, CJK Strategy, and other international companies like Synovate. Besides, there are companies for CI search engines, including 3soft and Korea Wisenut.

## CI Communities and Meetings

CI communities can be divided into two groups - private and public. Private ones involve CI professionals who get together privately without belonging to any registered organizations, whereas public ones involve CI professionals who meet publicly as members of registered organizations. From this perspective, private ones have been numerous and very active in Korea, while public ones are practically non-existent.

As for private CI communities in Korea, there have been two main subgroups - one from the Academy of Industry Intelligence and the other from various private and public organizations. Since 1983, CI professionals from the Academy of Industry Intelligence have held informal meetings to maintain their relationships and share information. In addition, there have been more regular meetings like 'Tuesday Meeting', 'Wednesday Meeting' and 'Thursday Meeting', where CI professionals from stock trading companies, group companies, banks, and public organizations, such as the prosecutors' office, the national intelligence service, and the national police agency, get together to exchange information (Lee, 2003). It is known that about 20 such meetings have been taking place each week. Along with these meetings, there have been many irregular 'Side Meetings' among CI professionals from various organizations.

In contrast to private CI communities, meaningful public CI communities have not yet come to existence. In fact, there have been a few attempts to establish a public CI organization, but they have not been successful. The most recent attempt resulted in the formation of SCIP Korea in 2002, but this organization has not been progressing due to insufficient support from CI practitioners in Korea who are not willing to appear in public.

## CI Education and Research

It wasn't until the early 2000s that CI started gaining attention from universities and researchers in Korea from the fields of business and library and information science. Since then, only two schools have offered CI courses and a few researchers have done some preliminary CI research. The primary reason for the late attention given to CI by universities in Korea is probably that, due to the secretive nature of CI practice in Korea, teachers and researchers may have found it

difficult to deal with CI in Korea in the earlier days.

With regard to college CI courses, the Graduate School of Business at Konkuk University has been offering two courses titled 'CI Management' and 'CI Analysis' since 2002, and the Graduate School of Library and Information Science at Seungkyunkwan University has also been offering a course titled 'Information Resources Management' where CI has been taught since 2002. As for CI research in Korea, four master's theses on CI (Lee, 2001; Lee, 2003; Choi, 2000; Sung, 1995) have been written, and a few other articles (Lee & Kang, 2002; Kim, S., 2002; Lee, 2002; Kim, W., 2002) have been published so far. Furthermore, the Korean Biblia Society for Library and Information Science held a small conference on CI in 2002. In terms of books on CI, foreign books including Kahaner (1996), Prescott and Miller (2001), and Fleisher and Bensoussan (2003) have been translated into Korean. A few Korean books somewhat related to CI (Yoon, 1988, 1989, 1990) were written earlier.

## Press Coverage

From the early 1990s, the mass media started paying attention to CI in Korea. The first article ever written on CI in Korea was known to be "Chaebols' Survival Game - Intelligence War" that appeared in *Monthly Mal* in 1992. Since then, several newspaper articles appeared in *Korea Economic Newspaper* in 1994, 1995, and 2003 and in *Daily Economic Newspaper* in 1997 and 1999. Furthermore, since 2000, CI has gained much more attention from the print and digital media with articles on CI appearing more frequently since then in various newspapers and magazines, including *Monthly Joongang* (2002), *Weekly Donga* (2001), *Electronic Newspaper* (2002), *Korea Economic Newspaper*, *Daily Economic Newspaper*, and *Economy21*.

## CI Champions

Current CI practices in Korean companies would not be possible without having had some key CI champions. Without any doubt, the earliest and most influential CI champion in Korea is Eunki Yoon, who is an ex-military intelligence officer and an ex-CI practitioner of Samsung (Trading) Corporation. He, along with his colleague Hongmoon Bae, established United Consulting and the Academy of Industry Intelligence in 1983. They consulted for many Korean companies,

and trained over 2,500 CI professionals in Korea for almost 20 years. Byungmoon Chun, the head of Executive Consulting, is another champion well known in the 1990s. In more recent years, Eunkyung Kim from 3mecca, Miran Park, and the authors of this article have been active champions for CI in Korea. There have been several key CI champions in the corporate world, including Samsung, LG, Hyundai Automobile, SKT, POSCO, and Kolon, but they do not want their names revealed in this article.

## Current CI Status and Statistics

With the help of leading companies' CI practices and CI infrastructure in Korea, an increasing number of Korean companies have had their CI programs installed for effective decision-making and actions. Lee (2001), a pioneering study of CI in Korea, provides some empirical evidence and statistics on CI practices in Korea. Since company size has important implications for CI practices, we report CI statistics for larger

(1,000 employees and above) and smaller (below 1,000 employees) groups<sup>5</sup> of companies separately, based on Lee (2001)'s database.<sup>6</sup> Table 3 shows relevant CI statistics.

According to the dataset, approximately 58% of the larger companies in Korea have a formal CI function in their organizations. Specifically, approximately 12% of the larger companies have a CI function with an independent unit, while approximately 46% operate without an independent unit. Among the smaller companies, approximately 3% have a CI function with an independent unit, and 22% operate without an independent unit.

The average number of employees involved in CI in each company is 29 for the larger companies and 7 for the smaller companies. These numbers seem to be very large relative to those in North American companies, and this is probably because monitors, along with CI professionals, are counted due to the way in which the question is posed. Monitors are those employees whose partial responsibility is to collect information

**Table 3. Statistics of CI Practices in Korean Firms**

Questions Related to CI Practices	Larger Firms (1,000 and over)	Smaller Firms (below 1,000)
Formal CI function exists?		
- Formal CI with an independent CI unit	12%	3%
- Formal CI without an independent CI unit	46%	22%
Number of Employees Involved in CI?	29	7
Rank the following information sources in terms of usage.		
- Employees	1 (40%)	1 (36%)
- Customers	2 (24%)	4 (13%)
- Online (Internet etc.)	3 (20%)	2 (27%)
- Outsourcing	4 (10%)	5 ( 5%)
- Newspapers & journals	5 ( 6%)	3 (20%)
Undisclosed information is more valuable than public information.		
- Agree	78%	78%
- Indifferent	18%	15%
- Disagree	4%	7%
How is CI conducted in your organization?		
- Regularly	76%	67%
- As needed	24%	33%

Source: Lee, 2001.

on external environments primarily related to their jobs and report to CI units through information systems, reports, and so on. Korean companies utilize monitors extensively in addition to CI professionals. For example, Samsung Electronics has over 600 monitors dispersed throughout the world (*Korea Economic Newspaper*, 2003).

Regarding information sources, 40%, 24%, 20%, 10%, and 6% of the respective larger firms cite employees, customers, online, outsourcing, and newspapers and journals, respectively, as the most frequently used information source. Meanwhile, 36%, 27%, 20%, 13%, and 5% of the respective smaller firms cite employees, online, newspapers and journals, customers, and outsourcing, respectively, as the most frequently used source. As such, employees are the most frequently used source for both groups of companies. Utilizing employees' personal connections is an embedded practice in Korean companies. For example, Samsung periodically surveys employees' personal connections with the government, political/legal circles, and so on, which is called "Census Taking" (*Economy21*, 2003), and utilizes this for collecting needed information. In addition, the larger companies tend to rely more on human sources than the smaller ones, while the smaller companies tend to rely more on public sources than the larger ones.

About 78% of both the larger and smaller companies believe that undisclosed information is more valuable than public information, while 4% of larger companies and 7% of smaller ones believe that the opposite is true. This result clearly shows that CI professionals in Korea value undisclosed information much more than public information. In addition, for larger companies, 76% conduct CI on a regular basis and 24% conduct CI on an ad-hoc basis, and, for smaller companies, 67% conduct CI on a regular basis and 33% conduct CI on an ad-hoc basis.

## Unique Facets of CI in Korea

Since CI, as a management practice, is subject to various environmental forces, including institutional environments, each country is likely to have unique facets of CI. In this section, we examine the peculiar features of CI in Korea in terms of its needs, practices, and infrastructure.

## Needs and Practices

With regard to Korean companies' CI needs and practices, there are several unique points that stand out. First, among various forces, political forces have influenced CI in Korea most strongly until recently, but their influence on CI, relative to economic and other forces, has weakened in more recent years. This appears to be the typical situation of a rapidly developing country. Second, owing to the Korean socio-culture of collectivity and strong human relations, Korean companies generally focus on human sources and personal connections of both CI professionals and employees for collecting information. In line with this, many CI professionals in Korea tend to greatly value undisclosed information while belittling open information as demonstrated above. Third, Korean companies in general have a tendency to focus on the collection phase rather than analysis phase of the CI process. This may mean that they lean toward collecting information which can be acted upon without much analysis, and that they are still short of cumulative databases and analytical skills. Fourth, through informal meetings, intelligence professionals in Korea from private and public sectors actively share information on various environmental factors, but they seldom share skills in CI. Sometimes, CI professionals purposely spread distorted information and malicious rumors through these meetings, and thus, the prosecutorial authorities will occasionally crack down on them. Finally, CI in Korea is treated as something secretive. CI professionals are reluctant to reveal their identity, and companies also try to hide the existence of CI units from the public. Besides, some employees in Korean companies even have an unfavorable impression of CI professionals, since these professionals sometimes practice CI in an unethical manner, crossing over legal boundaries.

As for the CI infrastructure in Korea, there is a unique point that deserves discussion. The amount of support from the CI infrastructure does not seem to be commensurate with the extent of CI adoption by Korean companies. This is particularly true with university education and research and formal communities. To date, CI consultancies and informal communities in Korea have played an important role in building and supporting CI in Korean companies, but university CI education and research and formal CI communities

**Table 4: Key Challenges to CI Growth in Korea**

- To bring CI to the public domain out of the mostly underground domain.
- To utilize public information more extensively by recognizing its usefulness.
- To improve the image of CI in Korea.
- To build the appropriate CI infrastructure, especially an active formal CI community and university CI education and research.
- To instill CI into small and medium companies in Korea.

have not done so, primarily due to the secret nature of CI practices in Korean companies.

## Challenges to CI Growth in Korea

CI in Korea has been developing rather significantly over the years, centering around large group companies, but there exist several key challenges, as summarized in Table 4, facing the future growth of CI in Korea.

The first and largest challenge is to bring CI to the public domain out of the mostly underground domain. Due to the historical influence of environmental forces and public intelligence, CI in Korea has generally been practiced underground, and this practice has had some merits up until now. However, as the political, legal, socio-cultural, and IT forces in Korea drive the society toward greater transparency, open CI is likely to become more appropriate for future CI advancement, while underground CI may become an obstacle to the future development of CI in Korea. All other issues discussed below are basically related to bringing underground CI to the public domain.

The second challenge to the future CI growth in Korea is to utilize public information more extensively by recognizing its usefulness. It is prevalent in Korea for CI professionals to greatly value undisclosed information secured via their personal connections. They

largely belittle the value of open source information. This bias tends to limit the future of CI development in Korea, since it may lead to under-exploiting public information, despite the fact that public information will be more readily available with enhanced information technologies. For this reason, understanding the usefulness of open information seems to be an important goal for the future of CI development. Information accumulation and analytical skills should also be developed as they are prerequisites for this understanding.

The third issue that needs to be addressed is improving the image of CI. CI in Korea generally has a somewhat negative image of spying, crossing over legal boundaries as necessary. This is a reason why CI professionals are reluctant to reveal their identity and why they sometimes get a suspicious glance from organizational members. This image is, in fact, not unfounded, for some Korean companies have practiced intelligence unethically and illegally. This was especially the case in the past. However, as the society becomes more transparent and open, this image limits the future growth of CI in Korea.

The fourth challenge to the future of CI development in Korea is to build the appropriate CI infrastructure, especially an active formal CI community and university CI education and research. There have been many informal CI meetings in Korea, as described above, where a small group of CI practitioners privately give and take information, but there has not been any meaningful formal CI community where CI practitioners, researchers, and consultants can publicly get together to share CI skills and methodologies. In addition, for further CI growth, universities in Korea need to provide CI education to a wider group of students and potential practitioners. Such education ought to be framed around CI research based on the best practices of domestic and foreign companies.

The last issue for the future CI growth in Korea is to instill CI into small and medium companies. As discussed earlier, formal CI has gained increased attention from many large companies but limited attention from small and medium companies in Korea. Given that large companies in Korea are limited in number, a greater participation of small and medium companies in CI is essential for the further development of CI in Korea.

## Future of CI in Korea

It is clear that CI in Korea will develop further in the future as Korean companies face greater environmental uncertainty due to enhanced globalization and competition, thus having a greater need for external information. However, it is not clear to what extent and how quickly CI in Korea will develop, since these issues depend on the extent to which and the speed at which various challenges to the future CI development discussed above can be addressed.

Given this, CI practices in Korea are generally expected to be more open in the future as the society becomes more transparent through political, legal, and social reforms. Similarly, the use of public information relative to undisclosed information will increase as public information gets perceived as being more useful and as firms adopt and utilize more advanced information technologies. Korean firms are also expected to place a greater emphasis on analysis than before as they accumulate more data and information and improve their skills in analysis. In addition, an increasing number of small and medium companies will adopt CI to gain their competitive advantage. College and university CI education and research and formal CI communities are also expected to improve slowly but steadily as CI practices become more open, the image of CI improves, and CI gains greater attention from the mass media. In this regard, SCIP Korea, which is currently at a standstill, is likely to move forward in the foreseeable future.

## Conclusion and Implications

The article provided an overview of how CI in Korea has evolved over the years and will evolve in the future. Based on our research of CI in Korea, we have drawn some key conclusions and implications.

Environmental forces, such as political/legal, economic, industry, technological, and cultural forces, and public intelligence, such as military and national intelligence have been the main drivers of CI in Korea. As these forces changed over the years, CI needs and practices in Korean companies have evolved. More specifically, Korean companies' CI needs have become more diverse with the passage of time. In earlier years, CI needs were limited more or less to political/legal

arenas, but, in more recent years, they have been expanded into economic, industry, technological, and other arenas. Similarly, the key driving forces for CI have also changed over the years. Political/legal forces were the dominating driving forces for CI in Korea up to the mid to late 1990s, while economic, industry, and technological forces became the main driving forces for CI in Korea starting from the early 2000s. In addition, CI practices have become more sophisticated over the years. Group companies in Korea practiced informal CI up to the 1970s, but began practicing formal CI in the early 1980s.

Although many large companies in Korea currently practice CI, the supporting CI infrastructure in Korea is still relatively weak. Although media coverage of CI is increasing, informal CI meetings are more frequent, and information providers are beginning to thrive in Korea, formal CI communities and university CI education and research have been lacking or almost non-existent. However, formal CI communities and education and research are likely to improve at least slowly as the society becomes more transparent and corporate CI practices gradually become more open.

Due to the Korean culture of collectivity and strong human relations, Korean companies rely on human sources and personal connections for CI more than other sources. Consistent with this cultural dynamic, Korean companies tend to value undisclosed information much more than open information. These phenomena are basically consistent with the way in which Korean companies treat CI. Korean companies generally regard CI as something secretive and regard their CI program as something whose identity is too confidential to reveal to the public.

This research provides an important implication for global CI theories and practices. It is suggested that national environmental context, national culture in particular, needs to be incorporated in developing CI theories and understanding CI practices. Facing their own national environmental context, Korean companies have exhibited unique CI practices, some of which are remarkably different from those of North American companies. In this connection, studying CI practices across countries for global CI theory development will prove to be interesting and meaningful future research.

## Notes

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2. A Chaebol group refers to a highly diversified group of companies that are primarily owned and controlled by family members and relatives.

3. For more information on the Korea Trade-Investment Promotion Agency (KOTRA), see [www.kotra.or.kr](http://www.kotra.or.kr).

4. CI professionals are usually named 'intelligence men' in Korea.

5. Companies were arbitrarily divided into larger and smaller groups.

6. We thank Lee for sharing the valuable database of his master's thesis with us for this article. We feel obliged, however, to point out to the readers that the reliability of data may not be very high due to a somewhat unsystematic data collection via the survey that we read in his thesis.

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