



# 20 years in CI

**Author: Jonas Pedersen**

As Deallus, in 2024, celebrates its 20th anniversary, it presents a good opportunity to reflect on the evolution of Competitive Intelligence (CI) in pharma over the past two decades. It also gives us time to pause and review the part CI will play for organisations in the future.

## CI is primarily a human endeavour

CI as a function has come a long way in the past 20 years, forming its own identity within organisations and, as a discipline, separating itself very clearly from market research.

Implementation of CI in organisations has often had a cyclical nature – from reactive to proactive, integration within an organisation, or not. We are proud that Deallus has been an integral part of these cyclical realities. We have advised our clients on how to set up CI functions and recommended and designed internal CI policies for large pharma as well as biotechs. With this, we gained the expertise and know-how of how pharma works (or doesn't) and how CI as a function can best add value to an organisation.

This is why we, as a company, are passionate about not only the need for CI but its importance within organisations to

**The evolution of CI and its place in an organisation is now allowing us to predict where it will be instrumental in the future for any organisation wanting to shape and define the market, rather than being led by it.**

drive innovation and inform strategic decision making. Its evolution and place in an organisation is now allowing us to predict where it will be instrumental in the future for any organisation wanting to shape and define the market, rather than being led by it.

**Deallus was founded in 2004 by Richard and Sarah Withers, and the couple was joined shortly after by Jonas Pedersen. With the three partners mixed backgrounds in Military Intelligence, CI and the pharmaceutical industry, from the outset Deallus was founded on sound core principles to create value to the business and the idea that for CI to be impactful it must fulfil three criteria:**

- **CI efforts must be directed to the most important decisions within the business.**
- **CI investments have to be demand driven.**
- **CI activities should be closely connected to decision makers and strategic planners.**

In summary, our view has always been that CI is primarily a human endeavour.

This emphasises that the CI role isn't an information gathering role, but one that requires a broader set of skillsets and work; stakeholder management, analytical skills, source agnostic and cross functional collaboration over the CI Cycle (Planning Collection Analysis Dissemination).



## Finding the right information

20 years ago we were in the early days of the internet era, where the challenges were finding information including searching and reporting on articles (as context the Google search engine went live in 1998 and the first iPhone was released in 2007).

Today the challenge isn't *finding* information, it's about finding the *right* information. The more analytically you work, as we do, there is an understanding that you don't need all the pieces to see the whole, you can extrapolate what a few, carefully selected pieces are telling you in terms of what the whole is.

CI is therefore a collection of methodologies with a data output. It is the expertise and experience of the people looking at this information that can fill in the gaps and provide the context and meaning from the pieces.

While initially focused on being data-driven and reflecting a boiling the ocean approach and seeking to maximise secondary and primary information gathered to generate conclusions, the value of CI - if done right, and being truly demand driven – will identify the necessary information, regardless of source, as well as the insights that are crucial to making strategic decisions.

...the value of CI - if done right will identify the necessary information and insights that are crucial to making strategic decisions.

We have transformed the way we work in this development to focus on our clients' strategic decision making - which has increased the impact to them and promises to be the same for the next two decades and beyond.

Even in Deallus' very early years we saw the importance of having a global presence and in the following years we moved into APAC; opening offices in Singapore, Japan and later China and India. We did this to be close to clients and hiring the people who know the regional/local environment. This position has not changed. By being local – including having native and bilingual speakers on the ground - we can guarantee expertise and impactful advice.

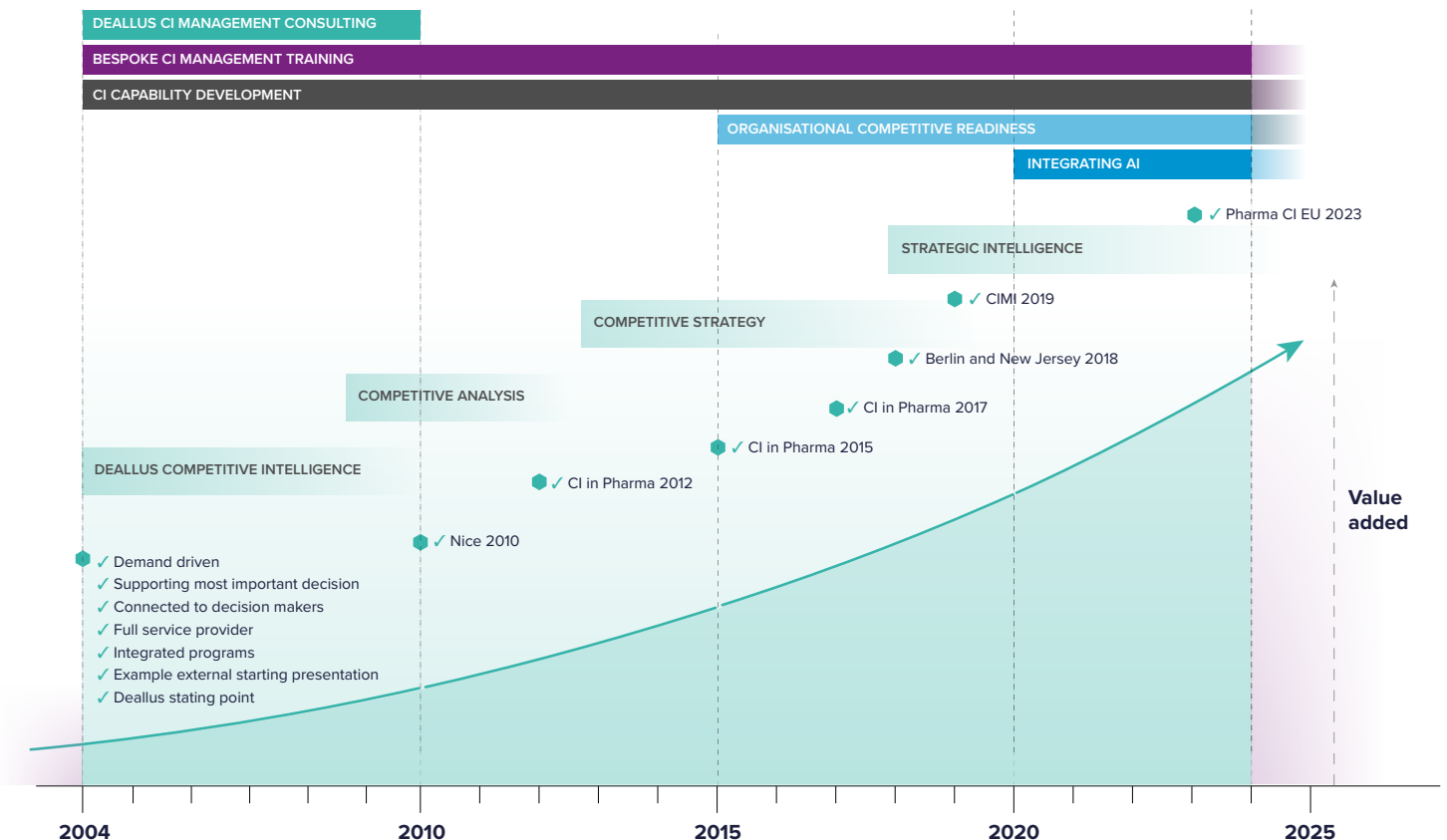


Figure 1: Deallus and the evolution of CI



## A fork in the road

In later years, there was a fork in the road: some providers continued the data driven path while Deallus and others shifted away from this to offer something arguably better.

CI became established as a discipline in its own right and was seen to drive and deliver value-add impact. It was no longer about just data, but about finding and consolidating the information, forming insights and recommendations as well as close partnership with clients.

### At Deallus we were driving this shift.

Rather than striving to separate CI and Market Research, Deallus promoted an integration of insights from both disciplines. Thus, CI and Market Research were further becoming integrated into Competitive Analysis, and, combined with the additional integration of monitoring and workshops, was able to generate further insights from our intelligence.

As the next step we developed and promoted the concept of Competitive Strategy. This is the logical extension of competitive analysis, but brings a further focus on the competitions' intent, capabilities, and strategies to shape our markets.

This mindset has always been present at Deallus - it was established to be a full-service provider of R&A, conferences, workshops, and training along with promoting integrated CI workstreams.

Beyond that, our workshops in particular, were leading the way in better understanding what CI was, the importance of competitive analysis and how, when truly integrated, it could impact positively across the business.

**It was about a shift to assessing the right data, in the right context in order to provide a view on how the future would look.**

## A 360-degree view

As the industry and external environment continued to evolve and develop, we came to understand that CI must move beyond the competition and look at all forces and agents that shape our markets. Hence evolved the concept of Strategic Intelligence, that emphasises a 360 view on our external environment as well as understanding all agents' intent, capabilities and strategies that will shape our markets.

We're seeing this as new companies, including biotechs, embrace the partnership CI model, moving straight to demanding the strategic CI support needed, versus some of the more established CI companies which can be observed to move slower as they often already have an established CI practice and structure based on previous concepts of CI support.

It is because these new competitors on the block need the information *and* the insight, that we can develop a powerful partner-based relationship and work better together. Again, our experience in running more than 350+ workshops demonstrates this in a very powerful way.





## Future gazing

CI methodologies have been evolutionary. We've seen this over the past 20 years, so how will this play its part in the future?

In the future we see CI becoming a more natural part of the strategy /commercial/business leadership curriculum with CI moving into being an obviously integrated part of the core of an organisation – CI expertise will have a seat at the table of any decision making or strategic planning body. They will also go beyond the competitor and consider the complete wider environment to understand what really is “shaping the market”, i.e. what we introduced as the strategic intelligence, to emphasise Intelligence beyond the peer-to-peer competition.

With increased competition – and from beyond the usual players - CI becomes an increasingly important part of strategic consideration planning, execution and decision making. Acting on internal data and development is simply not doable anymore. Therefore, any company not embracing strategic CI is potentially facing trouble.

As a CI partner we need to facilitate this increasing demand for strategic intelligence so that the client's CI function can step up to the challenge. Any CI teams not going on this journey will risk being replaced at the strategy and decision-making table with other, or new, functions taking on these responsibilities.

In addition, we are seeing a shift in the CI professional profile with increased requirements for understanding, experience and expertise within brand, TA strategy, leadership, and beyond, through cross-functional participation. It is becoming less about ‘what’ they do and more around internalising the complex external environment.

A trend we can see, and that CI can embrace, is that organisations are moving from asking questions about the competition to wanting to become more competitive. This might come in different shapes, but we receive requests to help organisations become competitive ready, develop a competitive mindset and to develop more competitive thinking etc.

**If CI is properly positioned in your organisation, you will be an obvious conductor of initiatives.**



## The impact and influence of AI

AI certainly has its place and influence, and it continues to move the dial on how organisations are working.

In the years Deallus has been incorporating AI into its methodologies, we have been taking a very pragmatic approach to this new phenomenon. We looked across the CI cycle (Planning and Direction, Collection, Analysis and Dissemination) and asked, where can AI play a role and bring an advantage? Today we use a broad set of tools and platforms to support our research, analysis as well as report generation.

Appropriately used, AI is a powerful tool to manage a vast amount of data, to reveal patterns and create powerful summaries. It can help protect from duplication of work and can build models of repetitive events. It can also help to generate text and visuals.

In addition, we see a trend where AI allows tech companies or secondary information providers to move into the space of the traditional CI provider with a focus on gathering information rather than delivering higher value add analysis and creating a decision maker partnership. Here AI can compete in providing summaries and general background analysis.

**But AI has less value in predictions in uncertain and fast changing environments and in the tasks that requires human intelligence and people skills.**

But AI has limitations: it bases its information and models on available data which is, by definition, historical and therefore has less value in predictions in uncertain and fast changing environments. AI also has very limited use in the tasks that requires human intelligence and people skills, like stakeholder engagements, client management, people leadership and strategic analysis. [NB when we talk about AI advanced analytical capabilities, it is in analysing vast amounts of data, it is not strategic analytics in a company's strategic intent and future decisions and actions.]

Intelligence, impactful analytics, and strategic insights from analysing the information and data, making sense of it, and its meaning for clients, is where the value will come from – and this is where organisations really value what Deallus is doing.

AI has a place to play in how we collect and filter the vast amount of data available. Within CI, where AI will add the most value is as a powerful support tool in managing and summarising data and assisting in report generation and visualisation. But where AI struggles is replacing what we consider the most important asset: the human intelligence and valuable stakeholder engagements, client management, vendor management and analytical skills. This allows us to not just assess the market realities of today but to truly evaluate how these will evolve in the future.

Deallus operates at the sweet-spot intersection in providing the strategic insights on top of the information provided by AI. We have been using AI since 2020, but as an enhancement tool, not as a replacement. It has allowed us to focus on upskilling and hiring talent for the work that adds the true strategic value and inform the strategic decisions organisations need to make.





## In conclusion

As I reflect on 20 years of Deallus – and the pharma sector, I see that it gives us a context for where we are now and potentially provides a roadmap for the future.

We have been in-step with developments within CI and beyond, working with our clients to navigate, makes sense of and use the insight we deliver to ensure they make the strategic decisions necessary to better serve their clients and patients.

Because of this, I know that as an organisation Deallus will continue to be an innovative and strategic forerunner of developments within competitive strategy development for the next 20 years. We will continue to push CI and the CI practitioner towards higher value add positions, for CI to become an obviously integrated part in decision making and strategic planning.

The role of the CI practitioner of the future will put increasing emphasis on people skills, analytical skills, tech understanding and the ability to embrace science as well as commercial acumen.

I believe the CI role will become a natural part of the curriculum for future business leaders.

## Contacts



**Jonas Pedersen**  
**CEO Emeritus**  
**and Non-Executive Director**

[Jonasp@deallus.com](mailto:Jonasp@deallus.com)



**Julie Munch Khan**  
**Chief Commercial Officer**

[Juliemk@deallus.com](mailto:Juliemk@deallus.com)

# Deallus celebrating 20 years

## GEOGRAPHICAL SUPPORT

- **Offices** – Increased from **1 to 6**
- **Continents** – Increased from **1 to 3**
- We've run **workshops** on site in all continents except Antarctica

## PEOPLE

- **110+** employees
- **26 languages** spoken
- **35%** with **PhDs**, **80%** advanced degrees
- **Over 15%** of our team has been with the company **5+ years**
- **Over 40%** of our **Senior employees** are women
- **500+** Deallus and Deallus Alumni globally

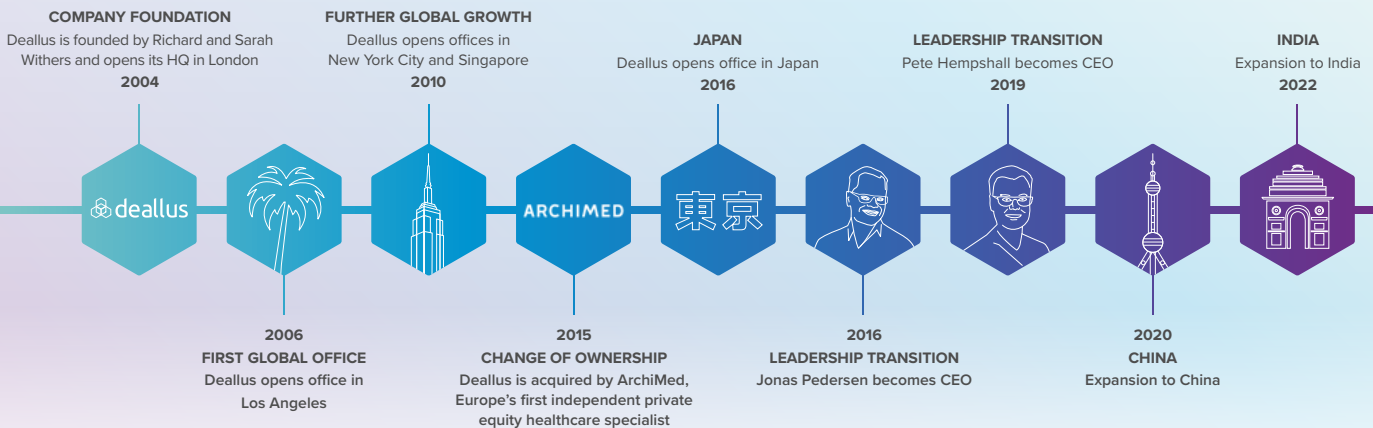
## CLIENTS

- **15 of top 20 pharma** as clients
- We have partnered with over **130 clients**
- **350+ workshops** run over 20 years
- Average **feedback score of 9/10**

## EXPERTISE

- We have supported **75+ TA/Indications** across Oncology, Cell & Gene, Neuroscience, Vaccines, Rare Diseases, and Personalised Healthcare
- **Delivering around 250 projects a year**
- We have engaged with clients across workshops, market monitoring, conferences and competitive CI training
- We impact our clients' strategic decision making across the product life cycle and including at corporate, portfolio and brand level

## 2004-2024 TIMELINE



Visit: [deallus.com](https://deallus.com)

Email: [info@deallus.com](mailto:info@deallus.com)

Follow us:  

Deallus is a global life sciences consulting firm with heritage in competitive intelligence. We empower clients to achieve competitive advantage through generation of strategic intelligence and actionable insights.

Our strength is unrivalled therapeutic area expertise, deep understanding of our clients' needs, and proven methodologies to deliver strategic value across the product lifecycle and the broader organisation.

Deallus has a global staff of 110+, and presence in all major pharmaceutical markets, through offices in L.A., New York City, London, Tokyo, Shanghai, and Gurugram (Delhi NCR) – and more than 26 languages spoken.

Our therapy area expertise, including neurology, oncology, rare diseases, cell and gene, and vaccines, personalised healthcare, and our global reach, serve clients across business insights, brand and marketing, R&D, portfolio strategy, medical affairs, and market access, value, and pricing.

