Over the past 10 years, lean innovation strategy, management and practice has emerged as well-engineered, multidisciplinary and data driven, helping companies ‘Think Big, Start Small and Move Fast’. Lean innovation has improved innovation outcomes, faster than ever, in ways that dramatically mitigate risk. The days of dark-room design and ‘hit-n-miss’, solution-led innovation are at an end.

And the time is ripe for further growth in this arena. The 2018 PwC CEO Survey shows that ‘threats to growth’ is the biggest concern keeping CEOs up at night and Gallup has revealed that employee disengagement is at an all-time high, with the global average topping out at 87%.

But although lean innovation is recognised by creative leaders as an engine for continuous growth and a way to improve their people’s experience of meaningful work, this State of Innovation Capabilities 2018–2019 Report shows that SA organisations still don’t have the strong innovation capabilities they need to move powerfully into the future.

So how do we bring lean innovation to life within and across our organisations? How do we move beyond one-off innovation projects to systemic innovation capabilities delivering long-term sustainability?

This is where we come in.

Our goal with this report is to help us and other South African leaders better understand the practical steps we must take to make innovation repeatable and impactful. And, by undertaking this research annually, greater benchmarking information will emerge to guide us along our way.

After all, only by knowing where we are, can we move forward to where we want to be.

Dear South African Business Leader,

So you’d like to bring the principles, values and practices of the lean innovation economy into your organisation? Here’s what you need to know:

- South African executives are good at developing their innovation strategy, communicating it, and aligning their people around it. Well done.

- The bad news is that our innovation practices are immature. We need to rethink the way innovation is funded, as well as make more metered funding available for it.

- We also need to work more closely with the education system to deliver the skills we need to embed continuous innovation in our organisations.

- The ugly news is that politics, turf wars and lack of alignment are the dominant innovation obstacles.

Sound familiar? Want to know what you can do about any or all of these as leader in your organisation? We’ve included some pragmatic advice in the form of exec call-outs for your consideration on p4 and the rest of the report will show you in more detail the snapshot we have about the current state of innovation capabilities in South Africa.

Paul Steenkamp
Co-Founder at the Creative Leadership Collective | Member of the National Advisory Council on Innovation

Dr Awie Vlok
Stellenbosch University | Department of Business Management, USB
Create a shared definition of innovation

Innovation means different things to different people. **Misalignment erodes precious innovation resources as people pull in different directions.** If you don’t have a shared definition of what innovation means in your business, developing and embedding one is a great place to start. If you can link this definition to ‘growth’, even better.

Business-is-Innovation

Still see innovation in the old way? As a ‘special activity’ maybe? In short: expect failure. It’s too easy to put off innovation when it’s an ‘optional extra’. Rather **embed the pursuit of your innovation across your entire Human Capital Life Cycle**, starting with Performance Management & Contracting, as well as Reward & Recognition.

Innovation management matters

Research into the ‘innovation maturity stages’ of organisations has plotted the evolutionary phases of making innovation an integral component of the organisation’s being. It found that an organisation’s capacity to manage innovation tends to improve over time – but only when leadership is taken to manage the specific issues at the different maturity levels.

Rise the entrepreneurial function

The professionalisation and capacity building of intrapreneurs must happen. Ad-hoc trainings must be phased out and replaced by comprehensive packages that include co-ordinated training schedules, certification for trainings, coaching and mentorship. **If we don’t grow our intrapreneurs, who will?**

We just don’t believe you

SA execs like to talk about the value of failing fast, provided lessons are learnt and learning shared. But in a recession and with the threat of retrenchments, people don’t believe that failure is really an option. This disconnect is bad for innovation in your business. **You must walk the talk.** Show that you’re failing fast before asking others to do the same.
1. p8 Who took part in the survey.


4. p23 Innovation **obstacles**: What’s getting in the way.

5. p25 Open comments – This is what your peers have to say about innovation in corporate SA.
In the spirit of lean innovation, this pilot survey was designed and launched as a punchy, low-risk first iteration.

Our goal was to get moving on a successful pilot to start the process of generating a comprehensive and longitudinal dataset via an ongoing annual survey. These findings are therefore tentative.

However, we’re excited that these emerging patterns are resonating strongly with leaders and intrapreneurs on the ground – those driving innovations that matter to our companies, country, continent and the world.

READING GUIDELINES

When answering the survey, our participants scored each question on a scale from 0 to 6, where:

0 = Not aware
1 = Low degree
6 = Strong degree

Our survey participants were from several companies and industries from across South Africa.

Section 1 on p7 unpacks in broad terms who our participants were.

If you have any questions, please contact Paul Steenkamp at paul@clcafrica.com.
SECTION 1
Who took part in the survey
A total of 119 participants contributed to this pilot survey representing several companies and industries across South Africa. A similar survey, *Innovation Made Tangible 2018*, conducted earlier this year and compiled by Dr Tendayi Viki and the innovation and design consultancy 1508, attracted 112 participants across the combined Nordic countries.

**Organisation types**

- 54% Small to large businesses and utility organisations
- 58.8% Management
- 36% Financial services
- 10% Government Depts

**Positions within the organisation**

- 20.2% – Owner/Executive/C-level
- 19.3% – Senior management
- 19.3% – Middle management
- 11.8% – Junior level
- 10.1% – Intermediate level
- 8.4% – Innovation practitioner
- 5.0% – Experienced innovation practitioners
- 3.4% – Consultants and advisors
- 2.5% – Other
Innovation Maturity Stages
Learning to manage innovation

The Maturity Stages graph (below) was derived from the work of innovation management thought leaders who see four to five evolutionary phases in making innovation an integral component of an organisation’s being. As you can see, the ability of organisations to manage innovation tends to improve over time, and management is challenged by different issues at the different maturity stages.

1. **AD HOC INNOVATION** Not discussed, no formal focus, rarely happens

2. **EMERGING** Some awareness, some organised innovation effort and formalised processes, occasional results

3. **DEFINED** Formalised strategic programmes linked to customer or business objectives, intentional training and communication

4. **INTEGRATED** Effective innovation programmes with funding and formal links to business units. Innovation portfolio integrated with vision, tracking and implementation of outcomes

5. **OPTIMISED INNOVATION** Repeatable, scalable, pervasive innovation, empowered employees, impact essential to the brand, culture and enterprise value proposition

**Participant Innovation Maturity Stages**

From participant feedback in the open sections of the survey, research interpretation suggests that our participants are at different innovation management maturity stages and none are operating at stage 5.

- **4 – 8%**
- **3 – 34%**
- **2 – 44%**
- **1 – 14%**

This seems to be in line with international trends as measured in the 2018 *Benchmarking Innovation Impact Report* by Innovation Leader, where nearly 60% of participants placed themselves at the first two stages, while only 4.1% saw themselves being at stage five.
SECTION 2
The capabilities clusters
The State of Innovation Report measured six general innovation management routines used before in other studies, with some customisation for local conditions.

**SECTION 2 / The capabilities clusters**

**ENABLERS**
p18 – Factors that have been found to enable those involved with and for the innovation process.

**LEARNING**
p17 – Providing opportunities for mastering innovation skills sets and learning from past actions.

**ORGANISATION**
p16 – Structuring people and organisational entities for innovation.

**INNOVATION PROCESSES**
p15 – The systems, processes and activities for turning ideas into value and direction.

**INNOVATION STRATEGY**
p13 – The senior leadership that provides organisational focus and direction.

**LINKAGES**
p14 – External entities that help to bring about the desired innovation.
Before we drill down into the specifics of each capability, these were the highest and lowest ratings across all six areas we focused on, measured on the 6-point scale. Basically, it’s a wide-angle view of the good and the bad.

<table>
<thead>
<tr>
<th>THE GOOD</th>
<th>THE BAD</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.08</td>
<td>2.5</td>
</tr>
<tr>
<td>4.75</td>
<td>2.71</td>
</tr>
<tr>
<td>4.71</td>
<td>2.73</td>
</tr>
<tr>
<td>4.67</td>
<td>2.87</td>
</tr>
<tr>
<td>4.58</td>
<td>2.9</td>
</tr>
</tbody>
</table>

**Management commitment & support for innovation.**

- The executive team provides a clear view of how we can benefit from innovation.
- The structure doesn’t stifle innovation, but encourages it.
- The executive team has a shared vision of how the organisation will develop through innovation.
- Everyone is involved in suggesting ideas to improve offerings or processes.

**Correct funding for innovation.**

- Working with local and national education systems to address the need for skills.
- Innovation reward & recognition; capturing what we’ve learned for the benefit of others.
- Interdepartmental innovation.
- Working with research centres, innovation hubs and/or HE institutes to renew & develop our knowledge.
#1 INNOVATION STRATEGY – 4.04

- Top team commitment and support.
- Clear view of innovation benefits from the executive level team.
- Structured trend-monitoring to imagine threats and opportunities.

- Innovation portfolio covers core, incremental and transformational offerings.
- Review technological and market developments strategically.
- Clear communication of strategy so everyone knows our innovation targets.
#2 Linkages – 3.97

Our external networks of specialists.
Collaboration with external entities to develop new offerings.
Understanding current and future customer needs.

X Working with lead users on future offerings.
X Working with research centres, innovation hubs and higher education to renew and deepen our knowledge.
X Working with the education system to communicate our skills needs.
#3 INNOVATION PROCESS – 3.81

- Green check marks: Systemic ideas-search towards new offerings, services and business models. Mechanisms to understand customers’ needs. Flexibility to allow fast-track product development projects.
- Red x marks: Clear systems and criteria for selecting innovation projects. Early involvement of all depts in new offerings dev. Innovation projects metered funding rather than entitlement funding.

**Process factors**

<table>
<thead>
<tr>
<th>Mechanisms</th>
<th>Metered Funding</th>
<th>Understand needs</th>
<th>Ideas</th>
<th>Involvement</th>
<th>Criteria</th>
<th>Fast-track</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#4 ORGANISATION – 3.79

- Innovation is not stifled.
- We work well within departments to realise innovation.
- Everyone is involved in idea suggestions.
- There’s an innovation culture in the org.
- Communication vertical and horizontal.
- Structured for rapid decision-making.
- Working across departments for innovation.
- Our rewards and recognition support innovation.
INNOVATION LEARNING – 3.78

- Learn from our mistakes.
- Commitment to train people for innovation.
- Learning from other organisations.
- Learning from past projects to improve future performance.

- Understanding innovation risks.
- Meeting to share learning experiences.
- Capturing learning to benefit others in the org.
- Using measurements to identify innovation management improvement areas.
#6 INNOVATION ENABLERS – 3.78

- Leadership support.
- Correct strategy.
- Ability to test and learn.
- Correct approach and tactics.

- Correct teams/employees.
- Correct technology.
- Accepting failure as part of progress.
- Funding levels.
SECTION 3
Innovation metrics
NUMBER OF MEASURES USED

Out of 119 participants 112 (94.1%) use between one and ten measures in their innovation initiatives.

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>3%</td>
<td>All 10</td>
</tr>
<tr>
<td>40%</td>
<td>6 to 9</td>
</tr>
<tr>
<td>40%</td>
<td>2 to 4</td>
</tr>
<tr>
<td>12%</td>
<td>1</td>
</tr>
</tbody>
</table>

The remaining 5–6% reported using reputation, sustainability, time reduction and post-project support.

One participant said they ‘have metrics, but understanding them is a different issue’, one said they have none, and another said theirs was ‘antiquated’.
The innovation measures used by participants

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>67%</td>
<td><strong>Customer:</strong> Growth in the number of new customers buying our product</td>
</tr>
<tr>
<td>66%</td>
<td><strong>Customer:</strong> Increase in the number of customers <strong>repeatedly using our products/services</strong></td>
</tr>
<tr>
<td>59%</td>
<td><strong>Offerings</strong> (eg. new products and services)</td>
</tr>
<tr>
<td>59%</td>
<td><strong>Customer:</strong> Confidence in our products and services</td>
</tr>
<tr>
<td>58%</td>
<td><strong>Customer:</strong> <strong>Increase in the potential</strong> customers considering our products/services</td>
</tr>
<tr>
<td>55%</td>
<td><strong>Strategic</strong> (eg. comparative advantage)</td>
</tr>
<tr>
<td>54%</td>
<td><strong>Financial</strong> (eg. ROI, payback period, IRR)</td>
</tr>
<tr>
<td>46%</td>
<td><strong>Market</strong> (eg. new offerings, market share)</td>
</tr>
<tr>
<td>42%</td>
<td><strong>Customer:</strong> Time saved in customers’ lives thanks to our products/services</td>
</tr>
<tr>
<td>34%</td>
<td><strong>Customer:</strong> Money saved in customers’ lives thanks to our products/services</td>
</tr>
<tr>
<td>13%</td>
<td>Unsure</td>
</tr>
<tr>
<td>7%</td>
<td>Other</td>
</tr>
</tbody>
</table>
SECTION 4
Innovation obstacles
When the 2018 results of the international study *Benchmarking Innovation Impact* by Innovation Leader were compiled, study leads were surprised to find that a lack of funding and skills had, in 2018, been replaced as the primary innovation obstacles by a cluster of problems they labelled politics, turf wars and lack of alignment. It seems the same goes for local innovation leaders.

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.28</td>
<td>Politics, turf wars and lack of alignment</td>
</tr>
<tr>
<td>4.22</td>
<td>Lack of budget</td>
</tr>
<tr>
<td>3.78</td>
<td>Inability to act on signals critical to future business</td>
</tr>
<tr>
<td>3.72</td>
<td>Inability to detect signals critical to future business</td>
</tr>
<tr>
<td>3.69</td>
<td>Innovation competencies of leaders</td>
</tr>
<tr>
<td>3.66</td>
<td>Not adopting emerging technologies</td>
</tr>
<tr>
<td>3.54</td>
<td>Lack of talent or skills</td>
</tr>
<tr>
<td>3.32</td>
<td>Cultural issues</td>
</tr>
<tr>
<td>3.26</td>
<td>Lack of strategy or vision</td>
</tr>
<tr>
<td>3.11</td>
<td>Lack of executive support</td>
</tr>
<tr>
<td>2.8</td>
<td>Lack of CEO support</td>
</tr>
</tbody>
</table>

It’s clear that we need mechanisms to deal with innovation tensions, such as how to balance liberated thinking with resource constraints, and seeking win-win solutions rather than following outdated win-lose approaches.
SECTION 5
Open comments
What is innovation?

Participants had different views of what innovation means. Most saw it as it relates to product and/or service innovation, while some use the broader ‘innovation as creative destruction’ philosophy.

However, the common denominator across most definitions was ‘new ideas resulting in value’ and experienced practitioners have categories, forms and types of innovation within this broad definition.

‘We do incremental innovation through an embedded practice of learning. We do not focus on tech, but methodological innovation.’

‘Main innovation lies in technology and applied research.’

‘Inclusion depends on specialist roles for innovation, not mainstream activity for the most part.’

We included open-section comments in the survey for participants, which we’ve captured here you under thematic headings.

- What is innovation? p25
- Adopting innovation management, p26
- Stages in learning to manage innovation, p27
- Balancing production and innovation, p27
- From good to best to breakthrough practices, p28
- Performance and measures, p29
- Risk management, p30
- Innovation ecosystems, p30
- Timing issues, p31
- Learning and development, p31
Adopting innovation management

It takes time for organisations to understand why innovation has become strategically important and to figure out how best to change, for example integrating innovation with their core business.

In fact, most organisations find it difficult to migrate from incremental innovation practices, embedded in business plans or taken for granted, to the deliberate stimulation of directed innovation to bring about radical, transformative or systemic innovation.

Our participants covered a wide range here, from those still in the beginning of the adoption process to those that have moved innovation to the centre-stage of their operations.

‘I’m an independent business advisor and expert in customer experience strategy ... most of the large corporates that I consult to don’t have a clear vision of their innovation strategy. The execs may support innovation in what they say, but this is rarely backed up by actions, planning or business decisions.’

‘I see that innovation processes most often happen in silos. Beyond marketing and customer-facing teams, few others have a real understanding of customer wants/needs.’

‘Again, because of our organisation’s historical structure and focus, the idea that innovation should become central in our processes and decision making is still a relatively new concept, [we’re] still in the process of acclimatising.’

‘[This idea of an] innovation utopia isn’t one I’ve seen with any of the large corporates that I consult to in Southern Africa. I have seen (or heard) of these environments from friends who work at places like Airbnb and Tesla, but I’ve never seen this with a large corporation in South Africa.’
Balancing production and innovation

Production and innovation are both important for business and finding the right balance is what matters most. The balance is usually contextually influenced by the innovation levels of our particular industries and some industries innovate much faster than others do.

‘We’re constantly trying new things and we have criteria to assess them, but this flexibility can come at a cost to delivery on core work.’

‘We’re a small business pioneering new ways of learning through games. Our biggest obstacle is the challenges of growing a new business while creating time and head space to innovate in a strategic and focused manner.’

‘It’s a balancing act between governance and compliance, and innovation will remain a driving factor in itself for innovation.’

Learning how to manage innovation

The extracted comments suggest that some participants are at Maturity Stage 1, with much of the development curve still ahead of them.

‘Understanding customer needs is still rudimentary and surface-level for most large businesses.’

‘Our organisation was historically focused on R&D activities rather than innovation. The strategy has only recently shifted to make innovation and impact a priority. As such, many of our processes are still being developed; hence my relatively low scoring in this section.’

‘We don’t have an Innovation Plan as yet, but doing future demand planning steers us in this direction.’

‘We’re still in the “contemplating” phase – an idea!’
From good to best to breakthrough practices

Most disciplines have good practices and best practices that are developed over time and are derived from evaluations of what successful practitioners actually do. As an emerging discipline, however, innovation appears to have more opinions and speculations than proven acceptable practices.

But there’s also a case to be made for ‘breakthrough’ practices, since innovation is not about catching up, but going beyond, as some participants seem to be doing...

‘[We] run a public economics skills development programme that involves a winter school each year, academic sponsorships, and internships. [We] have partnership agreements with many academic institutions that unlock meaningful innovation relationships and make these relationships available to our client departments and entities across the public sector...’

This reflects more than minimum compliance and suggests that this participant is creating conditions for ongoing innovation to happen through training, partnering, relationships and networks.
Performance and measures

Managers introduce performance measures to monitor and evaluate progress against plans or some futuristic intent based on insights from the past.

With this in mind, it’s understandable that they, in a bid to exercise more control over the process, seek measures relating to the number of ideas generated and processed to develop some plausible explanation of ratios over time.

But although these measures may be useful for understanding aspects of innovation and may even be necessary, they may not be sufficient.

Innovation requires more than trajectories based on past insights and knowledge. The future will be less about competing with current knowledge and more about competing on imagination, creativity and harnessing independent thinking driven by experience and wisdom available to corporates.

It’s good to see organisations developing innovation measures that assist them in measuring the right things to allow progress in important innovation focus areas. Ultimately, innovation measures have to be context-specific.

‘As a public sector entity it’s about whether the innovation offers a social, economic or environmental change opportunity which fulfils sustainability principles and prepares us for the future around water security, health and food.’

‘Reduction in patient waiting times and headcounts.’

‘Reputation as the hub for [product] knowledge and innovative products’

‘Most companies are using antiquated measures to evaluate innovation, such as product.’
Risk management

Risk is part of innovation and can be managed in different ways. Current practices mostly link resource allocations to increasing knowledge, becoming available during an innovation project’s duration.

‘Risks associated with innovation often become major focus in the innovation conversation and can squash good ideas before they have the opportunity to flourish.’

‘As a public entity, certain enablers require time to develop a full understanding of failure and derisking, the correct level of funding and having the internal technology to manage external innovations more effectively.’

Innovation ecosystems

Creating the right ecosystems around innovation priorities allow for more sustainable innovation systems over time, but only if the right players are involved and the environment fosters creative thinking.

‘We’re starting to form part of the mainstream economy in our sector, getting recognition from, and engaging with, organisations in our sector through affiliations, endorsements, exhibitions, and so on.’

‘We’re in constant communication with various stakeholders and researchers; particularly pertaining to research activities and products.’
Timing issues

History shows many examples where good ideas were rejected before markets were ready, and sometimes it takes a long time for new ideas and technologies to be adopted and to make any impact.

‘This company is a business. Business is competition and meeting the customer need in the best way possible with the highest quality. Innovations have a short time span and that window of opportunity doesn’t open forever; we need to turn the innovation into a sustainable business with constant growth and more innovation.’

‘Government is unfortunately notoriously slow and inflexible with new products, and the final decision-making process is not clear.’

Learning and development

Organisations that are open to the learning process tend to outperform others and this applies to innovation as well. Innovation is often associated with first making mistakes before getting it right. Much learning can be extracted from reviews of what worked or did not work before.

‘There’s a definite lack of collaborating with institutions of higher learning.’

‘Learning with other organisations tends to be informal and using personal social networks and relationships; these engagements are not always participatory or transparent as a result.’

‘Because of this new structure and direction of the organisation towards “innovation”, we’ve made learning a priority, so as to expedite the development of proper processes.’
This survey was conceived and conducted as a pilot project.

As a highly experienced core team with strong academic credentials, we opted for a lean approach to rapidly establish some research data at minimal cost with a focus on the needs of participants individually and collectively, rather than adopting a particular model.

We used an exploratory survey method and a self-administered questionnaire derived from scholarly and expert sources, and hosted on SurveyMonkey by an external administrator.

A convenience sampling method was used by announcing the survey through social media groups and inviting participation of those interested to share their views and learn the views of others about innovation capabilities in South Africa.

This survey was originally intended for eight members of the CLC to produce a pilot survey report that could be used for exploratory follow-up discussions with participants to assist them with implementation issues. Instead, we got 119 participants, generating the data used for this report.

As a first attempt, we’re satisfied with the quality of responses obtained from our survey participants. Our future surveys and reports will aim for higher numbers, additional survey items and participant demographics to allow for stratified sampling and advanced analyses.

We’re confident that, with support from you and other participants, we’ll be able to grow the scope and value of future reports for you and the greater innovation ecosystem in South Africa and, at some point, the continent.

We look forward to the journey.
ABOUT THE AUTHORS

Paul Steenkamp, CLC

With 20 years’ experience in organisational design and development, Paul specialises in bringing the principles, values and practices of the innovation economy into legacy organisations and has delivered more than 6 500 innovations and R10 billion in net business benefit doing so.

With a firm belief in the power of maximising human potential, Paul founded Great Place to Innovate (formerly I am Jack Frost) in 2016 to help leaders tap into their people’s creativity, no matter who they are or what they do for the organisation. In 2017, he founded the Creative Leadership Collective to build and apply collective knowledge about why and how some South African companies innovate well and others don’t.

Paul serves Cabinet as a member of the National Advisory Council on Innovation and lives with his wife, daughter and three dogs in Stellenbosch.

If you’re a business leader with a strong sense of purpose and believe in the power of human potential to drive innovations that make a difference in the world, Paul would love to hear from you. Please email him at paul@clcafrica.com or paul@greatplacetoinnovate.net.

Dr Awie Vlok, USB

The authors of this annual report are Paul Steenkamp, co-founder of the Creative Leadership Collective – South Africa’s community of corporate innovators, and Dr Awie Vlok from the University of Stellenbosch Business School. Both organisations are dedicated to building collective knowledge about how and why some companies innovate well and others don’t.

Awie joined Stellenbosch University in 2011 to study, teach and apply innovation management as an emerging discipline. He’s facilitated innovation interventions across the world and has presented at various international innovation leadership conferences.

Awie has developed and implemented award-winning innovation capacity-building programmes for scientists, functional support groups and their leaders. He assists clients with innovation strategies, capacity and leadership.

He trained with the Centre for Creative Leadership (CCL), his MBA research investigated creativity in strategy, and his doctorate was on innovation leadership in South African organisations. Awie is also a member of ISPI, SAIMS and SARIMA where he’s presented innovation research papers.
AND THE THANKS GOES TO

The State of Innovation Report
Capabilities 2018–2019

This first State of Innovation Report was made possible by the selfless contributions of several people whom we would like to thank, including Dr Tendayi Viki, Prof Mugendi K M’Rithaa and many others, whose inputs helped us to refine and consolidate other surveys, expert views and state of innovation reports.

We would also like to thank every participant for taking the time to complete this survey. Without you, quite literally, this report wouldn’t be possible.

Our intention is to repeat this survey every year for a five-year period to monitor and report progress. There may be interim surveys conducted at the request of members.

For more information or if you have survey questions and suggestions for future reports please email Paul Steenkamp at paul@clcafrica.com.