CREATING SHARED VALUE

An exploratory case study assessing the shared value that a company is creating through a protected area and its unique relationship with local communities

By

Andrew Nicholson

Thesis presented in fulfilment of the requirements for the degree of
Master of Philosophy Environmental Management,
in the Faculty of Economic Management Sciences Stellenbosch University

Supervisor: Prof. Brian Child

March 2017

DECLARATION

By submitting this thesis electronically, I declare that the entirety of the work contained therein is my own, original work, that I am the sole owner thereof (save to the extent explicitly otherwise stated) that reproduction and publication thereof by Stellenbosch University will not infringe any third party rights and that I have not previously in its entirety or in part submitted it for obtaining any qualification.

Date: March 2017

ABSTRACT

With the world's population continuously growing, extreme pressure has been placed on the unsustainable drain of the earth's natural resources. There is an increasing trend from a range of stakeholders to call on businesses to take the lead in resolving this problem. Shared value, a development from Corporate Social Responsibility, is a relatively new concept in management literature, with little empirical research having been conducted in this field. This research set out to examine the experience of shared value creation within the eco-tourism sector in South Africa.

A qualitative case study was performed on an organisation's pioneering work in this field, at a selected reserve within their portfolio, which is situated in Mpumalanga. A series of 76 interviews were carried out with the organisation's head office management, the community development management partner organisation, the guests at both lodges visiting the reserve, the managers and employees at these lodges, and members of two local impoverished communities. Content and frequency analysis was carried out on the data.

Through the analysis, it was established that shared value is being created in a broad range of aspects between the organisation and the two neighbouring communities studied. A close match exists between the perceived benefits identified by management and the actual benefits realised in the communities. Ideas for improving shared value from both parties only received a partial match. The study demonstrates that eco-tourism, if responsibly managed, is a valuable form of land use, is economically viable, and can help to uplift the poor through education and healthcare initiatives, job creation and economic growth. A shared value approach in eco-tourism can lead to more satisfied and educated staff who are motivated to conserve and protect the natural resources in the area, while delighting the organisation's guests. This pioneering work has laid the foundation of an apparent sustainable relationship.

OPSOMMING

Met die wêreld se bevolking wat steeds toeneem, word ontsettende druk op die onvolhoubare vermindering van die aarde se natuurlike hulpbronne geplaas. Daar is 'n toenemende neiging onder talle belanghebbendes om 'n versoek tot sake-ondernemings te rig om stappe te doen sodat dié probleem hokgeslaan kan word. Gedeelde waarde, wat uit Korporatiewe Sosiale Verantwoordelikheid ontstaan het, is 'n relatief nuwe konsep in bestuursliteratuur en min empiriese navorsing is tot nou toe in hierdie veld gedoen. Dié navorsing het ten doel gehad om die skepping van gedeelde waarde binne die eko-toerismesektor in Suid-Afrika van nader te bekyk en te ervaar.

'n Kwalitatiewe gevallestudie is gedoen oor 'n organisasie se baanbrekerswerk in hierdie veld in 'n uitgesoekte reservaat wat in Mpumalanga geleë is. 'n Reeks van 76 onderhoude is gevoer waarby dié organisasie se hoofkantoorbestuur, die gemeenskapsontwikkeling-bestuur se vennootorganisasie, besoekende gaste wat in twee huise in die reservaat woon, die twee vermelde huise se bestuur en werknemers, asook lede van die plaaslike behoeftige gemeenskappe, betrokke was. Inhouds- en frekwensie-analise is op die data uitgevoer.

Deur middle van die analise is vasgestel dat die ontstaan van gedeelde waarde tussen bovermelde organisasie en die twee buurgemeenskappe, wat betref 'n hele reeks aspekte, aan die ontkiem is. 'n Hegte gelyke bestaan tussen die waargenome voordele, wat deur die bestuur geïdentifiseer is, en die werklike voordele wat in die vermelde gemeenskappe ervaar word. Idees van albei partye om die gedeelde waarde te verbeter, het slegs 'n gedeeltelike gelyke ontvang. Die studie bewys dat eko-toerisme, indien dit verantwoordelik bestuur word, 'n waardevolle vorm van grondgebruik is. Dit is ook ekonomies haalbaar en verrig 'n opheffingstaak aan behoeftiges deur middel van onderwys en gesondheidsorg-inisiatiewe, werkskepping en ekonomiese groei. 'n Gedeelde waarde-benadering in eko-toerisme kan lei tot meer tevrede en opgeleide personeel wat gemotiveer is om natuurlike hulpbronne in die gebied te bewaar en te beskerm onderwyl hulle terselfdertyd gaste puik hanteer. Dié baanbrekerswerk het 'n volhoubaarheidsgrondslag gelê.

DEDICATION

I would like to dedicate this research to young aspiring environmental graduates. As a patriotic South African, I would like to encourage all of you to do your best in making our beautiful country the eco-tourism capital of the world. With our extremely politically turbulent past and a history of prejudice, relocation, and disempowerment alongside serious social and environmental challenges, we have a huge opportunity. Not only do we have a huge opportunity, but also an obligation to our children and their children to buy into a mind-set of preservation, conservation, and sustainable living.

ACKNOWLEDGEMENTS

Firstly, I would like to thank my supervisor, Prof. Brian Child, for his assistance in helping me complete my thesis. His experience and knowledge in the field of community engagement in Southern Africa was invaluable. Thank you also to the programme coordinator, Jennifer Saunders, for dealing with all the administrative formalities during my studies. I would also like to thank my unofficial supervisor, Prof. Margie Sutherland from the GIBS institute, for continuously giving me direction and encouragement. I can honestly say that I wouldn't have been able to produce this research without your positivity, foresight, and academic excellence.

I would also like to thank Joss Kent and andBeyond, as well as Francois Peenz and the Africa Foundation for allowing me to use your organisations in my case study. A huge thank you must also go out to all staff from both organisations, as well as to all the participants from Welverdiend and Hluvukani who sacrificed their valuable time by agreeing to participate in this research. Without them, I wouldn't have had a study.

I would like to say a huge thank you to the Dreyer family. Your hospitality while I was staying in Stellenbosch was very much appreciated. It was the perfect family environment, a home away from home, and for this I will be forever grateful.

Lastly, I would like my family. To my grandparents, for exposing me and their other grandchildren to nature through memorable family holidays to the bush, and for always encouraging further education. To my parents and brother, for their unwavering encouragement, advice, and overwhelming support.

CONTENTS

LIST OF TABLES

LIST OF FIGURES

LIST OF GRAPHS

CHAPTER 1. INTRODUCTION

1.1   RESEARCH BACKGROUND

This study investigates the concept of Creating Shared Value (CSV) in the context of a modern wildlife and tourism operation and local communities in the Kruger National Park (KNP) area of South Africa. CSV is a relatively new concept within academia, initially formulated by Michael E. Porter. Its origin stems from extensive research into Corporate Social Responsibility (CSR), much of which has resulted in criticism (Porter & Kramer, 2011:2) and perhaps a real dissatisfaction with the role that global business has on providing greater value within society. In short, CSR can be defined as "an investment into human capital, the environment, and stakeholder relationships" beyond the firm's core business (Weber, 2008: 248). According to Kvistgaard (2013:19) this implicitly refers to the notion of the triple bottom line, the people, planet, and profits, indicating the amplified expectations of society towards the responsibilities of business. It would seem that there is already an expected connotation with the word 'responsibility' within the acronym CSR indicating that it may almost be seen as an obligation and not something that is done voluntarily, like it was initially set out to be. On a global scale, CSR ironically emerged and evolved as a response to the growing awareness of the detrimental global consequences of our unsustainable drain on natural resources and the continuous emission of greenhouse gases into the atmosphere (Kvistgaard, 2013:1). CSR also involves educating and empowering communities that neighbour businesses; the same communities on which these businesses depend so heavily for their survival.

For years, many have been posing the question presented by Biswas, Biswas-Tortajada, Joshi and Gupta (2014:1): "Can business and society work together to foster each other's prosperity"? Unfortunately, this is a question that may remain unanswered for decades. Environmentalists feel that CSR is being used as a superficial public relations tactic within the corporate world to better enhance a company's reputation and image (Biswas & Biswas-Tortajada, 2014:1). Kvistgaard (2013:18) further elaborates that there is a tendency that CSR activities are purely performed as a form of window dressing. This 'green-washing' can be insensitive towards cultural needs, is environmentally destructive and the ethics behind false marketing and advertising has now been found out. South Africa is a country that has experienced an extremely turbulent racial and political past, which further emphasises the need for local business to transform and embrace some positive societal changes. Ultimately, the

1

purpose of a business must lie in society, creating value for society outside the business itself because business enterprise is an organ of society (Drucker, 1973: 61).

Porter and Kramer (2011:5) suggest that shared value is not about sharing value that has already been created; rather, it is about expanding the pool of economic and social value. Beschorner (2013:109) disagrees, arguing that CSR has evolved and "is not an end-of-pipe practise but an integral part of practises included in supply chain and market side". This evolution, however, has been slow. A combination of a number of factors, including the equivalent misuse of global human resources has contributed to CSR not achieving what it was initially set out to achieve (Kvistgaard, 2013:1). This has resulted in the emergence of a 'new' theoretical and strategic approach where companies can create economic value by creating social value; this has been coined as 'Creating Shared Value'. This research and literature review will contribute towards and elaborate on this intriguing debate.

In line with the above, this study will also explore eco-tourism from an emerging environmentalist's viewpoint. An in-depth focus is required when researching the economic, ethical, and managerial considerations of tourism in order to recognise eco-tourism in a variety of different contexts. The aim here is to investigate whether the term 'eco-tourism' is currently misused and exploited in South African society, as well as to define the concept and better understand its effectiveness. This is an important point of departure. Eco-tourism can be defined as "responsible travel to natural areas that conserves the environment, sustains the well-being of the local people, and involves interpretation and education" (The International Ecotourism Society [TIES], 2015). Although eco-tourism seems to be an accepted worldwide practice, this research and application will be reflected specifically in a South African context, using the KNP as a study site. This case has been selected purposefully, due to perhaps a subjective ideal of an eco-tourism success story operation and how it brings benefits to the various parties that are influenced and involved. It would be remarkable if many other nations looked up to South African organisations as role models, in order to duplicate conservation initiatives and eco-tourism initiatives worldwide. This study may just be the starting point for this ideal.

There has been a natural progression that started with CSR (1950's), moved on to philanthropy, and has now led to the rise of CSV (2006). In the researcher's view, no matter what terminology a business uses when addressing social progression and prosperity, or what method they

adopted to achieve this, the hope is that these businesses react rapidly to the desperate calls from society. Additionally, organisational behavioural changes to address social problems will only be effective if they happen in an ethical and sustainable manner.

1.2   AIM AND MOTIVATION OF THIS STUDY

The purpose of this study is to explore the relationship between andBeyond Ngala Private Game Reserve and two neighbouring communities, Welverdiend and Hluvukani, in an attempt better understand the concept and practice of shared value within the eco-tourism industry in South Africa. This may ultimately answer the question: "What value is this partnership creating"? Welverdiend has already been the subject of two previous studies, Spenceley in 2001 and Hendry in 2002, so there is an opportunity to update their findings and conduct research in a different community.

The aim of this research is to identify what effects andBeyond's wildlife business model has on these local communities, and whether there is a match or mismatch between the perceived value created by the reserves senior management and the actual value the communities understand they receive in the form of benefits. Ideally, this would result in a common shared value. It will also address the various parties' views on how to go about strengthening this partnership. These two communities were selected because of their close proximity to the reserve. Some previous research has been conducted on this subject within Welverdiend so this information will be expended on and

1.3   RESEARCH OBJECTIVES

The research objectives were to,

- Review the concepts of Corporate Social Responsibility, Creating Shared Value, ecotourism and protected areas.
- Review previous research on sustainable tourism undertaken at andBeyond Ngala and the local communities.

- Conduct research interviews with senior management of andBeyond Ngala Private Game Reserve and employees of the Africa Foundation in order to understand the perceived value the reserve creates in the local communities.

- Conduct different research interviews with locals in an attempt to determine the actual value being realised in the local communities.

- Analyse and interpreted the qualitative and quantitative data collected.

- Summarise the findings, communicated the results and made informed recommendations that may assist senior management and potentially governments, policy makers and other organisations in creating better economic and societal shared value.

CHAPTER 2. LITERATURE REVIEW (PART A)

The eco-tourism industry within South Africa and andBeyond Ngala within the Kruger National Park (KNP)

2.1   DEFINING ECO-TOURISM

In order to elaborate on whether eco-tourism is a misused term or not, and whether eco-tourism is being branded correctly and really working effectively, the term 'eco-tourism' needs to be defined first to set the standard for this research. There are many controversies over an exact definition of the term, but most definitions incorporate three major aspects: care of the environment, support of conservation initiatives, and assisting with benefits towards local communities (Shoo & Songorwa, 2013:76). This study uses the simple definition from the International Eco-tourism Society where eco-tourism is defined as "the responsible travel to natural areas that conserves the environment and improves the well-being of local people" (TIES, 2015). A major challenge for land owners and providers of eco-tourism lies in persuading and convincing the local inhabitants that foregoing short-term benefits such as the harvest of wildlife populations and vegetation will be justified through a more sustainable source of life and realising longer-term benefits instead (Moran, 1994).

It could be argued that the eco-tourism industry is one of the least damaging industries of all on the environment. Despite this, tourism may often result in direct environmental damage through the use of fossil fuels and the destruction of habitat that accompanies the transporting, exploitation, and accommodation of visitors to an area. Tourism is also notorious for disrupting, disturbing, or doing damage to local communities (Stronza & Gordillo, 2008:448). Despite what many eco-tourism critics might claim, tourism often results in better quality roads, facilities, and communication channels in remote areas. Due to the above perspectives, one needs to pose the questions: Is there really such a thing as eco-tourism? Is the term being misused?

Eco-tourism operations can attract nature lovers and those people concerned about their own carbon footprint and preserving the environment. It is these people that are generally concerned about the actions of society as a whole. They should not then be conned into contributing towards something other than what they desire. This is so often seen in the context where many

people pay a premium to embark on a variety of eco-expeditions; yet, few communities have realised significant benefits of any kind, regardless of their proximity to tourism operations or protected areas (Stronza & Gordillo, 2008:449). Spenceley (2006:18) suggests that certification systems, such as Fair Trade Tourism South Africa, could assist international and local tourists to identify which businesses are examples of responsible tourism, therefore ensuring greater sustainable benefits to society.

An increasing number of young environmental scholars are hypothesising that the real connection between eco-tourism and conservation comes through participation in ownership and management, rather than through economic benefits alone (Stronza & Gordillo, 2008:451). Frequent formal/informal communication between locals and park authorities or lodge management is also very important as it maintains an element of transparency and involvement (Hendry, 2002:99). In most cases, direct employment is empowering people. Within the last two decades, employment opportunities are improving as a result of the luxury lodges that have opened in the area. The results of this study may address aspects of this claim in more detail.

With a significant number of nature reserves and a rich diversity of wildlife, South Africa is uniquely positioned within the tourism industry. One development issue that South Africa currently faces that can be alleviated through eco-tourism is unemployment. The official unemployment rate in South Africa remains extremely high at 26.6% while the expanded, unofficial employment rate is currently at 36.4% (Statistics South Africa, 2016b:xiv). These alarming statistics could incentivise the national government to drive tourism through the establishment of more protected areas to address the pertinent issues of poverty alleviation through job creation. Protected areas and National Parks should no longer be seen as a hindrance to society, but rather as an engine of economic growth. Eco-tourism leads to an increased Growth Domestic Product (GDP) through job creation and an inflow of foreign exchange. South Africa has the power to use eco-tourism to support the country's poor and simultaneously promote conservation and preservation to yield a sustainable profit-generating industry.

2.2   A BRIEF RECENT HISTORY OF SOUTH AFRICA'S CONSERVATION

In the 1980s, a small group of environmentally aware and concerned South Africans attempted to change conservation perceptions in their country. They inspired the environmental equity

and justice movement. Their ideal approach was to begin at the grassroots level, winning broad-based acceptance and emphasising the basic rights of a human to a safe, clean, and healthy environment (Khan, 2002:64). Unfortunately, at a difficult stage in South Africa's history when Apartheid was being enforced, their voices were not adequately heard. The Apartheid era exacerbated tensions between local communities and protected conservation areas (Currie, 2001:16).

Prior to the turn of the century, "the dominant environment ideology was characterised by a wildlife-centred, preservationist approach which appealed to mainly the affluent, educated, and largely white minority" amidst rural black poverty (Khan, 2002:15). Beginning with a new democracy in 1994 that signified the end of Apartheid, there was a shift in focus from species preservation towards a more comprehensive approach of habitat and ecosystem conservation and sustainable development (Muller, 2009:69). Due to the scars of the Apartheid era, the so-called 'environmental movement' in South Africa was predominantly limited to this same white minority. Many non-white people had no interest in the environment because policies conserved National Parks that they were unable to visit (Russouw & Wiseman, 2004:132). These people, who made up the majority of South Africa's population, were excluded from the environmental movement and were therefore opposed to it, despite having an inherent appreciation and often extreme reliance on the resources around them. Their negative perceptions and attitudes towards conservation initiatives and environment preservation were deep, but justifiably so. Unfortunately, many conservation initiatives have historically been achieved through enforcement, which made some age-old livelihood practices illegal (Pimbert & Pretty, 1995:5). As a result, this has unfortunately benefited the middle-class white people at the expense of black people in South Africa. Hendry (2002:95) proved in his research that these views are slowly changing as the KNP does not have a bad and antagonistic relationship with local communities and people realise the need for someone to take responsibility for the control of resource utilisation.

South Africa has progressed considerably over the last 22 years; it is now part of a global movement and continues to play a significant role in various global events (SANParks, 2012:Preamble). South Africa has been rated as the third most mega bio-diverse country in the world, meaning that a delicate balance is required in the careful management of diverse people, culture, landscape, biological resources, and economy (SANParks, 2014b:10). Unfortunately, environmental racism issues of old still exist and persist post democracy. Conservation

thinking in Africa began mirroring that of the Western World where community conservation initiatives started to make their mark (Currie, 2001:6). Many were initiated in Zimbabwe and Namibia as early as the 1980s. The successful implementation of these initiatives is very much dependant on a variety of political, economic, social, and geographic factors. Pimbert and Pretty (1995:5), however, indicated that there is an ever-growing body of empirical evidence that shows that the transfer of 'Western' conservation approaches to developing countries can/has had adverse effects on food security and the livelihoods of people living in and around local communities. Therefore, investigating community attitudes towards the benefits that are derived from protected areas is a vital part of attempting to heal the open wounds left by years of conflict between rural communities and conservation in South Africa (Currie, 2001:11). Stifling of traditional hunting methods, little compensation for the loss of material wealth and land, inadequate benefits, and forced removal from specific areas have characterised the animosity and mutual distrust of community conservation-based relationships within developing Africa.

This argument is summed up perfectly by the CEO of South African National Parks (SANParks), Dr. David Mabunda in SANParks' 2012 Social Investment Report:

> "…special effort should be made to move away from our painful conservation past where public institutions were used to implement a well-crafted system of alienating certain spheres of society. Indeed, democratic rule in South Africa signified an incredible change in the history of our country. It ushered in new ways of thinking in the day-to-day running of public institutions, which meant that the country's resources had to be spread equally among all citizens so that all could contribute towards the building of a new society. However, as we celebrate the country's achievements, we need to recognise certain challenges that still exist: these include the relationship between protected areas and their neighbouring communities as we re-orientate protected areas away from an isolationist position towards an integrated one" (SANParks, 2012:iii).

Through engaging communities and ideally including them as a management partner, one can empower the previously disadvantaged and concurrently begin changing some long-lasting negative impressions about conservation in South Africa. Perhaps some form of legislation going forward should allow members of communities to perform roles in the management and

8

ownership of natural resources. In that way, individuals will be more empowered to take responsibility for conservation and can therefore be held more accountable for their actions, such as rhino poaching. This may only happen if communities are exposed to co-management structures and if they have the opportunity to voice themselves with regard to their country's resources.

2.3   ECO-TOURISM THROUGH SANPARKS

The tourism industry is booming worldwide and is one of the largest sectors of the global economy (Baral, Stern & Bhattarai, 2008:219; SANParks, 2008a:2). In South Africa, the situation is no different. Saayman and Saayman (2009:493) showed that the KNP has an economic impact of ZAR 1.5 billion, which benefits many businesses and people in the surrounding areas. More recently, Dlamini in SANParks (2014b:11) stated that SANParks's contribution to the South African economy is at least ZAR 6.7 billion annually, most of which comes through its tourism operations and a smaller portion through other sources; this highlights how SANParks is significantly strengthening the regional and national economy. Although a large portion of revenue was historically generated through hunting in Africa, photographic safaris have become increasingly popular. The credibility of this statement can be justified by the fact that the KNP in South Africa is one of the best-known and most profitable national parks in the world, attracting more than one million visitors each year (Saayman & Saayman, 2009: 493). The KNP is one of the country's prime tourist destinations. A recent Economic Impact Assessment (SANparks, 2008a:2) revealed that 75% of visitors to all our parks are South African residents, counter to popular belief. This, however, must not be confused with the amount of revenue generated through foreign visitors that regularly travel, often to the more high-end luxury lodges in the greater KNP area. With the fall of the South African rand at the end of 2015 and beginning of 2016, tourism in South Africa is expected to rise exponentially.

SANParks, established in 1926, is the leading conservation authority in South Africa, and is responsible for managing all the proclaimed national parks in the country. 19 individual parks make up approximately four million hectares of protected land (SANParks, 2014b:8). The KNP was established as early as 1889, but only opened to the general public in 1927 for the first time. It is South Africa's largest wildlife sanctuary and one of the biggest in the world, encompassing almost two million hectares of wilderness (SANParks, 2008b:17). SANParks

operate with the mission "to develop, manage and promote a system of national parks that represents the biodiversity and heritage assets by applying best practice, environmental justice, benefit sharing and sustainable use" (SANParks, 2014a:5). The KNP is approximately 350 km long and 60 km wide. Rivers form natural boundaries in the north and the south, and the reserve borders Zimbabwe to the north and Mozambique to the east. To the west, the park is predominantly bordered by private and provincial nature reserves and many high-density communal areas (SANParks, 2008b:19).

At present, SANParks directly employs approximately 10,000 people in permanent, fixed-term, and temporary posts, with most of these individuals coming from some of the most economically depressed areas of the country (SANParks, 2014c:2). According to Mabunda (SANParks, 2014c:2), a major focus was to "ensure sustainability and responsible tourism growth, while enhancing our vision of connecting national parks to broader society… Great emphasis has been placed on improving the socio-economic conditions of neighbouring communities." The generally positive attitude that locals have of the KNP can only be maintained if growing numbers of people located close to its borders derive direct and tangible benefits (Hendry, 2002:99).

From the above literature, in the researcher's opinion, the KNP can be considered a moderately successful eco-tourism operation (although it has not been independently certified as eco-tourism). In economic terms, it may not be easy to quantify the cost of damages that have resulted on the environment from the building of infrastructure within the park itself, but it would certainly be far less than if this large area was not preserved and conserved in the first place. This huge portion of land could have been used in many other less environmentally sustainable ways. This is blatantly evident in many of the surrounding areas, which have been completely overgrazed. According to Carlisle (2014), "the biggest single threat to the wildlife in Africa today, apart from internecine wars and rogue armies, is the diminishing free range of the animals and land misuse through inappropriate farming and obsession with cattle".

2.4   PROTECTED AREAS AS ECONOMIC ENGINES

One of the most conventional ways to go about the preservation and conservation of land is through the establishment of protected areas. There could be a lot of scepticism around a statement of this nature, as protected areas in developing countries have not necessarily been

the most successful instruments in achieving long-term conservation success (Pimbert & Pretty, 1995:43). This, however, is often limited by the need to provide proof that the benefits will exceed the costs. This frequently results in protected areas becoming 'paper parks' (Dharmaratne, Sang & Walling, 2000:591; Pimbert & Pretty, 1995:12), meaning that areas have been assigned for protection, but receive no support from local government and local people; they merely exist on paper. In developing countries, especially with the current turbulence in the South African economy and the depreciation of the rand, it is unrealistic to expect governments to financially support the management and protection of these areas where other forms sustainable conservation funding mechanisms are scarce (Baral *et al*., 2008:219; Blom, 2010:175).

In Africa, protected areas rely heavily on and have historically received a significant share of funding from developed country's governments and from non-governmental organisations (NGOs). In order to prevent an over-reliance on philanthropic and political trends, tourism can be used as a lucrative way in which support for financing the protection of biodiversity and eco-systems can be achieved (Baral *et al*., 2008:219; Blom, 2010:175; Currie, 2001:9). Furthermore, the expansion of protected areas and national parks has also resulted in employment generation and foreign exchange earnings (Pimbert & Pretty, 1995:i). This may be subject to external issues such as the global economy and general safety, but is certainly a more viable long-term option for land use. Due to the fact that andBeyond Ngala Private Game Reserve and the KNP already fall within a national park (protected area), further details about the financing of a protected area goes beyond the scope of this study.

According to the United Nations' (UN) List of Protected Areas, there were 209,000 protected areas worldwide, located in 193 countries, and covering more than 32 million square kilometres (Deguignet, Ju e-Bignoli, Harrison, MacSharry, Burgess & Kingston, 2014:2). The UN set globally agreed upon goals to advance the protected area footprint to 17% coverage of terrestrial areas and 10% of nationally administered marine areas by 2020.

Other areas also contribute to biodiversity conservation. However, they may not fit the criteria to be proclaimed as an official protected area. The above statistic is therefore rather conservative. Protected areas have been and still are being established all over the world to conserve biodiversity and protect ecosystems for current and future generations (Baral *et al*., 2008:218). Over and above this, these areas are also expected to contribute toward sustainable

development and adequately deliver benefits and value to local communities, such as poverty reduction (Blom, 2010:176). Conservationists, especially in biodiversity-rich countries of the developing world, such as in South Africa, are constantly challenged to design effective biodiversity conservation strategies that meet both conservation and development goals (Bookbinder, Dinerstein, Rijal, Cauley, & Rajouria, 1998: 1400).

Pimbert and Pretty (1995:2) cautioned that after the Earth Summit in Rio and the ratification of the Biodiversity Convention in 1992, all the developing countries that were encouraged to transform as much land as possible to strictly protected regimes, needed to do so at their own peril. This could be extremely detrimental to local people if it is not done correctly (de Beer, 2000:6). The majority of conservationists have falsely believed that there is an inverse relationship between human actions and the well-being of the environment. This can be justified with strong evidence that virtually every part of the globe has been inhabited, modified, or managed throughout our human past (Pimbert & Pretty, 1995:5).

With the small percentage of land worldwide being classified as protected, it has become a global trend to move away from the out-dated approach of prohibiting a linkage between livelihoods and conservation. Finding complementary conservation strategies was the only way to overcome the many limitations of this approach (Salafsky & Wollenburg, 2000:1424). In response to these shortcomings, especially within developing countries in the 1990s, the greatest success was achieved by directly linking livelihoods and communities. This is a process that begins with an indirect link and progresses from there onwards. The idea is to build developing relationships between biodiversity and the surrounding people, thus incentivising local stakeholders to directly benefit from this relationship (Salafsky & Wollenburg, 2000:1425). The central issue for new conservation science is to find effective ways of putting people back into conservation (Pimbert & Pretty, 1995:22). This mindset will no longer separate people from nature, like we have seen in South Africa's history, but rather, it supports the view that people should become part of nature. Without this, there is little chance of protecting wildlife. Salafsky and Wollenburg (2000:1435) went on to show that this linkage is only one among many that will ultimately influence conservation success. Being cognisant of this will certainly assist in strengthening the chances of more effective biodiversity conservation.

One way in which economic value is created is when people take raw materials from the environment and then, through labour, turn these materials into something people would buy (Beinhocker, 2006:25). A growing population could increase the amount of labour, and as a result the total wealth of society; however, this could also come at the expense of natural resources. In order to address the concern of diminishing resources, eco-tourism and nature conservation within protected areas can generate economic value in a sustainable manner.

It has become our duty as conservation professionals and members of society to seriously examine how local communities will tangibly and immediately benefit from conservation activities (Pimbert & Pretty, 1995:29). The attitudes of local people towards conservation need to be used to assess the extent to which community conservation addresses the immediate needs of the community (Currie, 2001:11). This understanding forms the basis of this research. It is only if a common shared value is attained that a protected area will be both cost-effective and more importantly, sustainable.

It can be seen that nature conservation, through the establishment of nature parks, is best form of land use in dry lands. This viewpoint, however, only becomes a reality if three goals are achieved:

- Sustaining the environment and conservation education;
- Creating jobs and economic growth; and
- Uplifting communities by assisting the poorest.

2.5   andBEYOND NGALA PRIVATE GAME RESERVE

andBeyond (formerly known as Conservation Corporation Africa), are a specialist luxury experiential travel company. Their focus is designing personalised luxury safaris in 15 African countries, as well as arranging bespoke tours in India, Bhutan, Sri Lanka, Nepal, Chile, and Argentina (andBeyond, 2016). andBeyond also own or operate 29 lodges on an extensive portfolio, operating in sub-Saharan Africa (South Africa, Namibia, Botswana, Zimbabwe, Mozambique, Tanzania, and Kenya) and in India. Their operations positively impact more than four million hectares of wildlife land. It would appear that one of the company's goals is to establish a footprint in many of the major wildlife hotspots throughout the world. The company

currently employs approximately 2,000 staff, which supports roughly 10,000 families. Conservation Corporation Africa (CCAfrica) was established in its current form in 1991, although many of the reserves that they are involved with have been operating for much longer (Buckley & Sommer, 2001:13).

andBeyond's tourism model is based on an ethic that encompasses a conservation philosophy revolving on three core principles: care for the land, care for the wildlife, and care for the people. The andBeyond brand attracts nature lovers and environmentally concerned/sentient guests who specifically travel with the company to participate in community development programmes. The company operates on the principle that a "private enterprise, in partnership with the public sector and the rural communities, can combine to develop Africa as the adventure continent of the world" (Buchanan, 1999:103). andBeyond has developed a strong reputation for promoting the restoration of land and biodiversity, with results such as the andBeyond Phinda land redistribution success story in South Africa, amongst others, to prove it.

Over the years, andBeyond has been involved in some historic conservation projects. These include translocating gaur and barasinha between India's national parks, providing safe havens for green turtle hatchlings, suni antelope, and Aders' duiker in Zanzibar, and a decade long leopard research project with Panthera in the MunYaWana, Kwa-Zulu Natal. The andBeyond brand has become well established in conservation circles worldwide. In 2013, andBeyond attempted to apply a proactive 'solution' to the rhino-poaching saga. They successfully donated six white rhino to the Botswana government in the first translocation of its kind. This project was a huge success and the animals are said to be thriving in the safe haven of the Okavango Delta in Botswana, an area with a well-respected security and anti-poaching team in place. This project served as a pilot study from which a partnership formed between andBeyond and the Great Plains Conservation for a large-scale translocation, which began in 2015. The project will cost in the region of USD 4.5 million. This covers capture and quarantine costs, transport of the animals, and monitoring costs within Botswana. The aim is for Botswana to gain a further 100 rhino. To date, the 'Rhinos Without Borders' project has ensured that 25 rhino have already arrived in their new home, while funding to move a further 30 early next year is already in place.

Some history of the area is highlighted below:

> "Until fairly recently, the central lowveld (including the area that now forms the Ngala Private Game Reserve) was considered an inhospitable region due to the presence of human and livestock disease. The first people to take permanent residence were said to be Shangaan, who moved here from what is now southern Mozambique about 100 years ago. European traders and hunters were active in the lowveld at around this time, but generally avoided the malaria and blackwater-ridden area during the wet summer months. The lowveld gradually became more populated with the construction of the Selati Railway line from Pretoria to Lourenco Marques (now Maputo) at Delagoa Bay on the Indian Ocean and the introduction of vaccines and disease-control programmes. Various forms of agriculture, most notably tropical fruit, were developed in the region. The Kruger National Park, an amalgamation of the Sabi and Shingwedzi game reserves, was proclaimed in 1926" (andBeyond, 2015:9).

In 1939, the Hoheisen family acquired land bordering the western boundary of the KNP. This area, which was later established as the Timbavati Private Game Reserve, covered approximately 62,000 hectares and was divided between 26 landowners (andBeyond, 2015:9). In his old age, Hans Hoheisen, who inherited the land from his father Alfred, donated four of his properties (Kempiana, Lilydale, Springvalley and Morgenzon) to the South African National Parks Trust (SANPT) in 1992, indicated in Figure 1 (Khoza, Nyathi & Roche, 2002:100). The land is now owned by the World Wildlife Fund (WWF) and intrusted to SANParks to manage. No fee is paid by WWF to SANParks, due to the fact that this land was proclaimed by the trust. Now known as Ngala Private Game Reserve, this portion of land amounting to 14,691 hectares, was the first Private Game Reserve to be incorporated into the KNP, illustrated in Figure 2. The Department of Environmental Affairs proclaimed the Kempiana and the Vlakgezicht properties as part of the KNP on 11 March 1994 (Spencely, 2001:42). Prior to that it was part of the Timbavati Private Nature Reserve.

TITLE DEED	FARM	PORTION NO	EXTENT	OWNER	SECTION	GOV GAZ	PROCLAM DATE	PERIOD	RESTRICTIONS
T6866/1992	Vlakgezicht 75	Remainder of portion 1	863.8188	WWF of SA	2B(1)(b)	15540	1994/11/03	Remain in force in perpetuity, subject to possible transfer to SANParks.	The management agreement is subject to the lease agreement between the National Parks Trust of SA and Sound Props 1311 Investments (Pty) Ltd
T30743/1991	Lilydale 89	Portion 0	3919.6874	WWF of SA	2B(1)(b)	15540	1994/11/03		
T30743/1991	Remainder of Kempiana 90	Portion 0	3960.5422	WWF of SA	2B(1)(b)	15540	1994/11/03	Remain in force in perpetuity, subject to possible transfer to SANParks.	
T30743/1991	Remainder of Morgenzon 199	Portion 0	2114.3169	WWF of SA	2B(1)(b)	15540	1994/11/03		
T30743/1991	Spring Valley 200	Portion 0	3838.1499	WWF of SA	2B(1)(b)	15540	1994/11/03		None
	Makuleke 6	Portion 0	22733.636	Makuleke	2B(1)(b)	19927	1999/04/16	50 years from 16 April 1999 with an option to renew.	None

Figure 1: Private land included by proclamation into the KNP, by written permission of the landowner (SANParks, 2008b: 19)
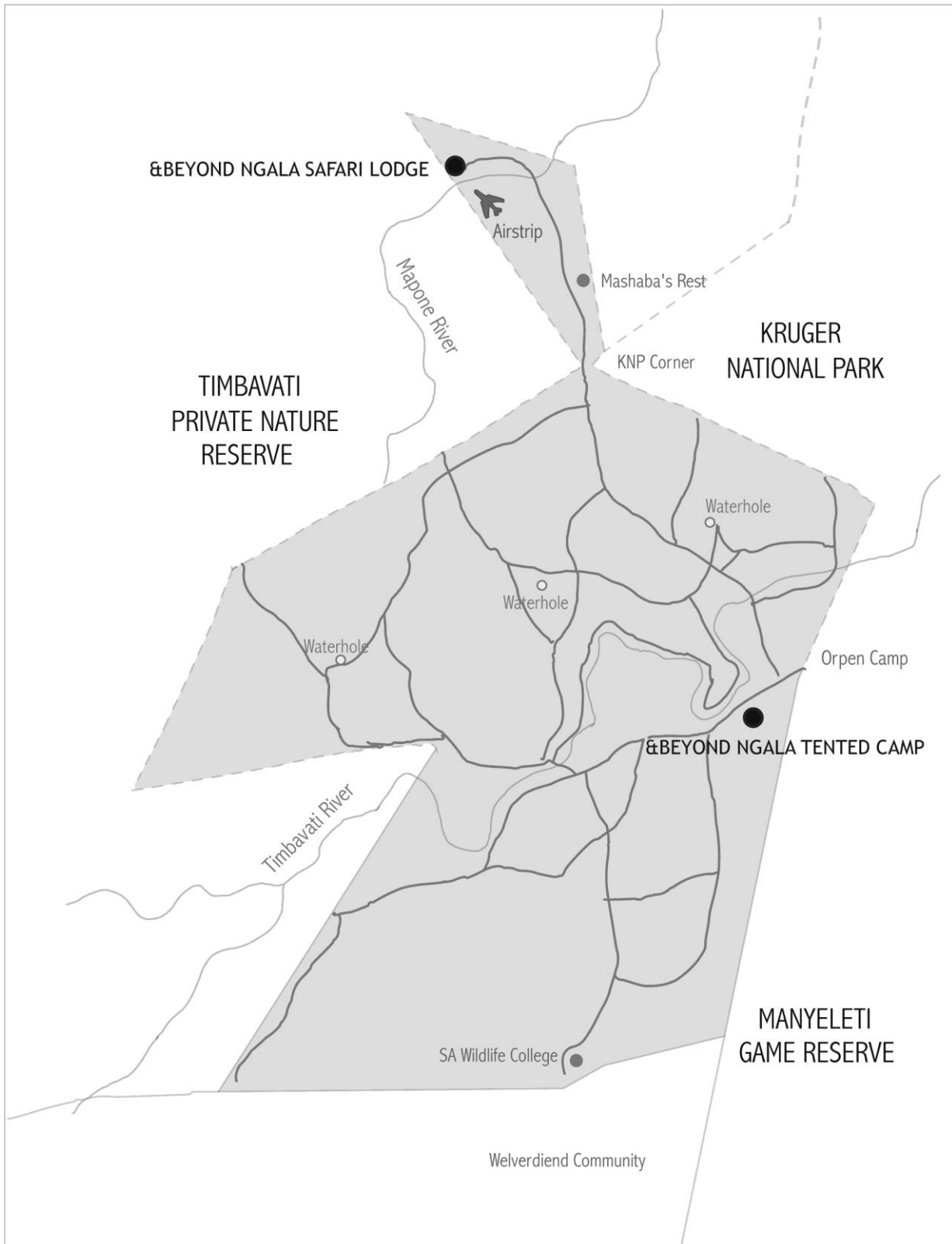
Figure 2: Ngala Private Game Reserve map (andBeyond, 2016)

17

andBeyond Ngala Private Game Reserve is an uncommon and innovative conservation partnership agreement between a government agency, an NGO, and a private corporation. The property was donated to the SANPT, via the WWF, with tourism operations having since been leased out to andBeyond who have exclusive traversing rights on the land (CCAfrica:53). Traversing fees and a percentage of profits from both andBeyond Ngala Safari Lodge and andBeyond Ngala Tented Camp, flow into the SANPT for use in expanding or adding to conservation areas (Buckley & Sommer, 2001:13, CCAfrica:53). Traversing fees are calculated taking into account the occupancy rate and the lodge accommodation revenue. For each successive year of the lease period, the annual rental shall escalate at a rate equal to an agreed upon Consumer Price Index (CPI) (andBeyond, 2016). In 2016, this amount was ZAR 2 million and will increase as of 1 July 2017. In the last ten years alone, over ZAR 52 million has been generated for biodiversity expansion (andBeyond, 2016). The West Coast National Park and Karoo National Park have been successfully extended as a direct result of this funding.

andBeyond Ngala Safari Lodge is tucked under a canopy of mopane and tamboti trees. The lodge has 20 classic thatched cottages and one family suite (maximum 45 guests). As of October 2016, 76 of the 100 staff (76%) that work at the lodge come from the local communities in the area (within 50 km). The annual turnover for the 2015 financial year-end was ZAR 25.8 million, and it was ZAR 18.5 million for 2016. The reason for the drop in turnover was due to the lodge being closed for a renovation for five months.

andBeyond Ngala Tented Camp has nine tents (maximum 18 guests) built on platforms cleverly designed to blend into the riverside trees, each with a private wooden deck. The main guest areas overlook the seasonal Timbavati River. As of October 2016, 29 of the 34 staff (85%) are from local communities. The annual turnover for the 2015 financial year-end was ZAR 18.6 million and it was ZAR 22.4 million for 2016.

Based on these numbers, andBeyond Ngala Private Game Reserve had an average turnover per hectare of ZAR 3,022 IN 2015, and ZAR 2,784 for 2016. 78% of the andBeyond Ngala staff compliment is from local communities. By operating on the reserve, andBeyond generate 0.01 job per hectare. Over the past decade, andBeyond Ngala's annual lease fees have contributed over ZAR 25 million to the SANPark's Trust.

The andBeyond Ngala field team are also firmly behind rhino conservation efforts. Together, under an umbrella campaign called 'Our Horn is NOT Medicine', they have managed to raise ZAR 2.95 million to date. They have channelled this funding directly to the 'Rhinos Without Borders' project, with smaller donations going towards the 'BatHawk project'. The BatHawk is a lightweight aircraft operating in conjunction with the South African Wildlife College based in the central KNP. Pilot, fuel, and general maintenance costs of approximately ZAR 1,000 per hour need to be in place to keep the aircraft in the sky. This funding allows the pilot to fly grid systems and GPS rhino coordinates in the area. This confidential information is given to the section ranger so that he can despatch anti-poaching teams into areas of high concentration. The field team also collects data on animal movements and provides information on animal behaviour to researchers in the area.

All lodges within the KNP are required to go through a bi-annual audit, as prescribed by the Integrated Environmental Management of SANParks (Sowry, 2014). The Ecological Control Officer (ECO), the relevant Section Ranger (SR) in the area, and the General Manager (GM) of the respective lodge carry out these assessments. Evaluative compliance is expected with the policies of SANParks including the National Environmental Legislation pertaining to sensitive areas. Reports are to be submitted to the Department of Environmental Affairs. Therefore, these protected eco-tourism areas are actively monitored and controlled by means of environmental audits.

Through these eco-audits, a lodge must obtain a score of 70% to comply with legislation, as specified through government regulation. Below are the considerations that were taken into account during the May 2016 audit. This audit is conducted independently by SANParks.

Biosphere manipulation:
No alien or invasive plant species can be introduced. Natural resources may not be collected on the property without approval from SANParks. Wood for operational purposes is from an outsourced, but local sustainable supplier.

Wildlife management:
Effective co-operation currently exists between Ngala and KNP with regard to anti-poaching initiatives. All employees working in the field have undergone Layered Voice Analysis (LVA) testing.

Water provision and extraction:

The prescribed SANParks water consumption figure is 350 litres of water per person per day. For 160 people (100 staff and 60 guests), this equals 56,000 litres per day. Both lodges have natural water-treatment plants with reed beds and extraction points. There are fences to keep animals out. The grey water is currently being used for irrigation and to fight fires if needed.

Problem animal management:

All solid and wet waste is currently being stored in scavenger-proof storage areas. Waste cages and tamper proof dustbins are distributed throughout the staff facilities.

Off-road driving; soil, and road maintenance:

Off-road driving is only permitted for confirmed sighting of Big 5 animals. Cheetah, African wild dog, and rare nocturnal animal sightings are also a case for off-roading. Off-road driving is not permitted after heavy rains, nor is it permitted on sensitive soil types such as along seep-lines and sodic areas. A list of specific tree species to avoid has been included in the policy, which each ranger must sign. Management strictly enforces this in order to prevent the compaction of soil, which may lead to damaged veld and excessive soil erosion.

andBeyond have agreed to pay a third of the entire reserve's land-management costs in order to incentivise sustained governmental interest, as SANParks are directly responsible for this land-management portfolio. SANParks also currently get funding assistance from the WWF.

Construction and design:

Light Emitting Diode (LED) lights are replacing all other types of lights. Once staff facilities and new buildings have been completed, all documentation needs to be sent to the ECO and SR in the KNP for safekeeping.

Power supply:

All diesel generators operate below 28 dB, which is regarded as suitable for a wilderness area.

Waste management:

Landfill sites are not permitted on the property and within the KNP. All solid waste is stored on-site and sent to local dedicated recycling operators to be separated.

Liquid waste systems:

Weekly inspections and testing of grease traps for fat run-off from kitchen applications, septic tanks, French drains, and reed beds are conducted.

andBeyond Ngala's most recent eco-audit was conducted on the 16th of May 2016, where they were awarded a score of 92%. The next eco-audit is scheduled for the 8th of November 2016. While these reports should be taken seriously, leaders in conservation and sustainability, such as andBeyond, should continue to strive for more sustainable living.

2.6   THE AFRICA FOUNDATION

andBeyond works closely with communities situated adjacent to the conservation areas in which they operate, whether by interacting with them as landlords or through community development initiatives. They do this alongside the Africa Foundation, which is their preferred social development partner. The Africa Foundation is an independent, non-profit, tax-exempt organisation that strives to uplift, up-skill, and empower members of communities in Africa (SA, Botswana, Mozambique, Namibia, Kenya and Tanzania) (Africa Foundation, 2016). They are a fully autonomous body with their own board of trustees. While the Africa Foundation does not work exclusively with andBeyond, approximately 95% of their projects are as a direct result of this relationship. The Africa Foundation was set up to ensure that communities see benefit from conservation areas in order for locals to buy into supporting the visions of such protected areas. The Africa Foundation was founded in 1992 as the Phinda Community Trust Fund, then later as the Rural Investment Fund; these were both funded by an anonymous Swiss trust (andBeyond, 2011). The name then changed to the andBeyond Foundation and more recently, the Africa Foundation.

The Africa Foundation also receives support and funding from the Africa Foundation (UK) and Africa Foundation (USA), who provide tax benefits to donors, as well as from andBeyond, guests who are travelling with andBeyond, and independent donors. Through effective consultation and collaboration with local communities and unique relationships built with government and local tribal leadership, the Africa Foundation empowers locals to facilitate socio-economic development (Africa Foundation, 2016). The philosophy of the Africa Foundation is that communities are required to be actively involved in the project's selection, development, and subsequent running once the Africa Foundation are no longer providing

financial support. Communities therefore become more accountable and responsible for the success of these projects. By working with local communities and not for them, and by making wildlife truly benefit the locals' neighbouring targeted reserves, strong and trusting relationships have been developed between andBeyond, the Africa Foundation, and these local communities; some of these relationships go back as long as 24 years.

andBeyond Ngala Private Game Reserve offers and encourages community visits to their interested guests, free of charge, allowing them the opportunity to interact with the locals and to share in the success stories of these relationships. To see the development (e.g. schools, clinics, technology centres, libraries, *etc.*) that has already been accomplished in a sustainable way is an eye-opener to many. From this experience, each guest of andBeyond instantly becomes a potential donor to the Africa Foundation, with 90% of their donations going directly to their specified project.

The Africa Foundation does not work for the communities; rather, the communities must work for themselves. The Africa Foundation just assists by empowering individuals with decision-making, skills development, and enabling conservation thought processes (Khoza, 2014). According to Carlisle (2014), giving people food is not the answer; instead, we have to help them with their education and health and then create opportunities for employment and small businesses, ending in a sustainable economic system.

The Africa Foundation has focused their attention in four key development areas: education, healthcare and clean water, small business development, and conservation. To date, some of the Africa Foundation achievements in community and sustainable development include (Africa Foundation, 2016):

- "access to water for 56,000 people through water tanks, pumps, boreholes and dams;
- provided 4430 Hippo Water Rollers, moving 2 million liters of water per month;
- 30 food gardens and 12 commercial farms to promote food security and nutrition and to stimulate household incomes;

- constructing more than 200 classrooms at schools and pre-schools, as well as other infrastructure such as teachers' accommodation and office administration facilities;

- building and equipping three media centres, improving academic facilities for thousands of children;

- increasing environmental awareness among all schoolchildren and teachers through conservation lessons for 500 teachers and 7,000 school children;

- the introduction and management of a bursary programme granting scholarships to 438 aspirant community leaders;

- built 2 and supported 5 clinics;

- constructing 165 EnviroLoos (permanent, waterless, sanitary, environmentally friendly toilets) and installing more than 200 water tanks at schools and community-based institutions;

- providing accredited computer training to hundreds of community members in the Digital Eco-Village;

- supporting 10 centres for home-based care volunteers who provide services to orphaned and vulnerable children and elderly community members;

- facilitating the installation of electricity at schools and community-based institutions;

- training community members for positions in the hospitality industry; and

- the Positive Health programme, which trains and supports remote communities on nutrition and HIV/ Aids issues reaching more than 30 000 people".

2.7   THE COMMUNITIES IN FOCUS

This research is going to focus on two communities that neighbour andBeyond Ngala Private Game Reserve: Welverdiend and Hluvukani (see Figure 3 for the location of these communities). Both communities are situated in the province of Mpumalanga, South Africa. They also both fall within the Ehlanzeni district, under the local municipality of Bushbuckridge. The racial make-up of the local residents in these communities is over 98% African black people, with the predominant language being Shangaan (andBeyond, 2016). These were the first two communities targeted by andBeyond and the Africa Foundation to make wildlife more valuable to the communities themselves.
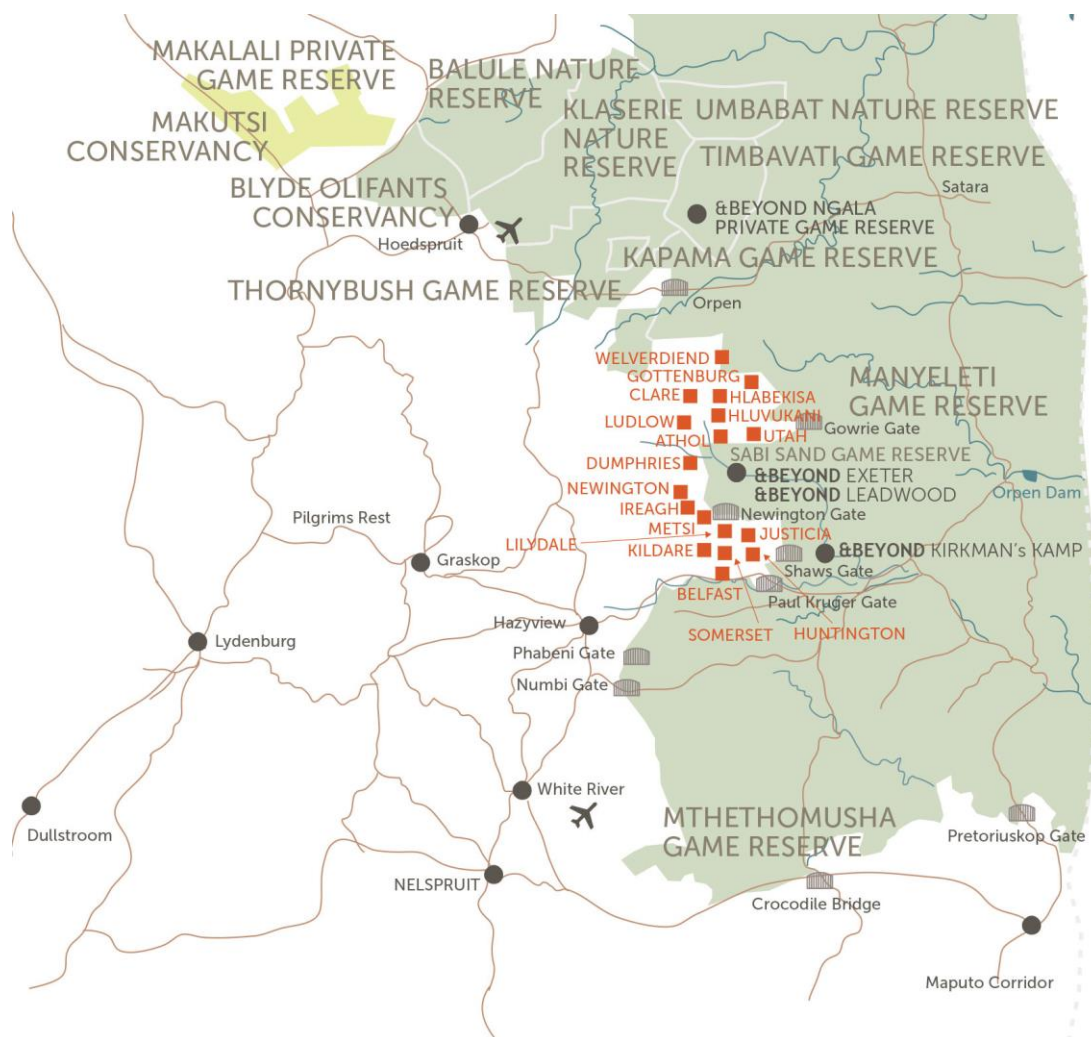
Figure 3: Location of communities neighbouring the western central KNP (andBeyond, 2016)

Welverdiend is a rural community comprising residential areas and communal grazing lands where anybody is free to graze their livestock (Henry, 2002:94). Welverdiend is adjacent to the KNP on the Western side, about 15 km outside of the Orpen gate, directly opposite the South African Wildlife College. The population is estimated at 8,000, with roughly 1,200 households. Although the smaller of the two selected for research, Welverdiend is the closest community to andBeyond Ngala Private Game Reserve. Hendry (2002:95) performed a study in Welverdiend on the conservation attitudes of people surrounding the greater KNP, which showed that residents had a positive attitude towards the practice and concept of conservation.

Neighbouring Welverdiend, Hluvukani lies west of the Manyaleti Game Reserve and south of the R531. It has an estimated population of 10,000. Hluvukani could be considered the hub of the immediate area because it receives the bulk of government support in the form of a medical clinic, library, and social welfare offices.

These communities are characterised by extremely high levels of unemployment and poverty; limited formal employment opportunities and therefore high labour migration to urban centres. This has resulted in many split families and de-facto women-headed households; high dependence on government social grants (old age pension, child support grant and disability grant); and local government structures which combine elected officials and bodies with traditional structures (andBeyond, 2016).

Within Welverdiend and Hluvukani, several projects and highlights have been achieved. Some of the completed projects/highlights are presented in Figure 4.

REGION	MPUMALANGA
LODGE/S	ANDBEYOND NGALA SAFARI LODGE & ANDBEYOND NGALA TENTED CAMP
COMMUNITIES	WELVERDIEND, HLUVUKANI

WELVERDIEND

Education
28 Tertiary Bursaries
Career Guidance Workshops
Conservation Lessons & Debates
10 Classrooms at 3 schools (Welverdiend PS x 4, Mahlale HS x 4, Nhlalala x 2)
Playground equipment for 4 preschools & crèches
1 Media Centre
First Aid Training for Preschool teachers

Health
58 Environmentally-friendly Ablutions at schools and community centres
6 School Kitchens (Mahlekisana, Tsakani, Mtembeni, Welverdiend PS, Newlife, Nhlalala)
935 Hippo Water Rollers
3 Boreholes
1 OVC Centre
3 Boreholes at schools, clinic & community centres
Rehabilitation of 2 water pumps
Water tanks and gutters for Clinic

Small Business Development
Small Business Training for Craft Market
1 Craft Market
Small-scale farm

HLUVUKANI

Education
24 Tertiary Bursaries
Career Guidance Workshops
Conservation Lessons & Debates
6 Classrooms (Xalamukani, Senias, Mdluli)
1 Sports Field
First Aid Training for Preschool teachers

Health
55 Environmentally-friendly Ablutions
1 School kitchen (Xalamukani)

Small Business Development
Permaculture Vegetable Garden
Small-scale farm

PS = Primary School; HS = High School; OVC = Orphans and Vulnerable Children

Figure 4:   Complete Ngala projects in Welverdiend and Hluvukani (Africa Foundation, 2016)

26

In conclusion, andBeyond Ngala is an example of a modern kind of protected area that contributes to conservation initiatives, economic development, and sustainable responsible tourism operations in the immediate geographical region. In a previous study conducted by Hendry (2002:96) on andBeyond, Ngala and Welverdiend, residents showed a positive attitude towards conservation, but majority of respondents claimed that they received no benefit at all from tourists in the KNP. Spenceley (2001:178) had the same findings in a sociocultural assessment performed in Welverdiend the year before, with residents saying they do not receive benefits from the wildlife areas they neighbour. In order to address these claims, the following research questions will be investigated in this research:

1. Is shared valued being created between andBeyond Ngala Private Game Reserve and Welverdiend and Hluvukani communities?
2. Is there a match or mismatch between the perceived value created by the reserve's senior management and the actual value these communities understand they receive in the form of benefits?
3. Is there a match or a mismatch between the ideas that the two stakeholder groups (senior management and the communities) believe will strengthen their relationship in the future?

CHAPTER 3. LITERATURE REVIEW (PART B)

A potential shift from Corporate Social Responsibility towards Creating Shared Value

3.1 CORPORATE SOCIAL RESPONSIBILITY

3.1.1 The need for a Corporate Social Responsibility

With the global population now exceeding 7.3 billion people and Africa accounting for approximately 17% of this figure, our planet is under severe pressure (United Nations, 2015:1). This figure is projected to rise to approximately nine billion by 2050 (Hills, Russel, Borgonovi, Doty & Iyer, 2012:18; Oberholster, 2013:174). In South Africa alone, the population is currently 55.6 million (Statistics South Africa, 2016a:23). Many people in the world live comfortably, but as the middle class is continuously shrinking, many more live in misery. Natural resources are being depleted daily and greenhouse gas emissions are on the rise. The environment and its remaining wildlife are suffering at the expense of the human race. Internationally, individuals in society are being forced to adapt their daily lifestyles in order to survive. Similarly, businesses are required to adapt to address societal needs in order to remain competitive. This is almost becoming a prerequisite for their long-term success.

Beginning in the 1950s, the public's mood became focused on social concerns; this caused CSR to become a product of the past half-century (Davis, 1975:19). Many people became increasingly critical of businesses selfish interests. With higher levels of insecurity and poverty than ever before, and higher societal expectations, there is added pressure on businesses to engage in CSR activities. With an explosion of interest in the CSR topic, one would be hard pressed to pick up a magazine or newspaper without reading about it or hearing about it somewhere in the news (Carroll & Shabana, 2010:85).

CSR has its roots in the requirement to respond to the needs of stakeholders other than investors (Reich, 1998:8). Kvistgaard (2013:18) suggested that CSR activities started out as a purely ethic endeavour. According to Margolis and Walsh (2003:282), if corporate responses to social misery are evaluated only in terms of their instrumental benefits for the organisation and its shareholders, we will never learn about their impact on society, especially on the intended beneficiaries of such activities.

3.1.2   *The origin of Corporate Social Responsibility*

CSR arose as a result of specific problems, such as deteriorating quality of life for many people, environmental degradation, and pollution. There was a perceived tension between profit maximising business and the affected environment and members of society. This would no longer be tolerated. New laws needed to be put into place and the ethics of business needed to be questioned. Firms realised that they had a moral obligation to fulfil in order to operate effectively. Businesses, therefore, had a vested interest in meeting both individual and societal needs (Smith & Langford, 2011:426), which would help them to remain more competitive and sustainable. As a result, businesses realised that they needed to be more socially and ethically responsible. This would enable them to attract future business and have more satisfied staff because their direct communities were benefiting from their own business ventures.

3.1.3   *Corporate Social Responsibility in the literature*

According to Carroll (1999:268), references to CSR occurred a number of times prior to the 1950s, but the most concrete origin of CSR was almost 65 years ago. Kvistgaard (2013:17) agreed that CSR emanated from a number of societal changes post World War 2. Many articles relating to the history of CSR only allude to the evolution of the term in the past half-century (Carroll, 1999:268; Carroll & Shabana, 2010:85; Davis, 1975:19). Some researchers disagree slightly, articulating that the emergence of the term was only in the 1960s (Griseri & Seppala, 2010:6). Carroll (1999:269) firmly believes that Howard R. Bowen's (1953) landmark book, *Social Responsibilities of the Businessman*, was essentially the beginning of the modern era of literature on CSR, which later stimulated further research. Therefore, Bowen can deservedly attain the title of the father of CSR (Carroll, 1999:291).

In the 1950s and before, CSR was mentioned, but was not defined in the literature. The 1960s marked significant attempts by Davis, Frederick, McGuire, and Walton to formalise a definition and more accurately elaborate on the meaning of CSR (Carroll, 1999:270). At this stage, the literature began to expand. Keith Davis, arguably the most influential proponent during this time, introduced the concept of the Iron Law of Responsibility, which is still commonplace in CSR literature today. He was of the opinion that managers needed to conduct business in a way that did not only result in a profit for shareholders. This is encapsulated in his definition of CSR as "businessmen's decisions and actions taken for reasons at least partially beyond the firms direct economic or technical interest" (Davis, 1960:70). William C.

Frederick was also an influential contributor to the early definition. Many years later, management guru Peter Drucker (1973:59) argued that the concept of profit maximization is, in fact, meaningless. The objective of a firm is to create value, while earning enough to survive. He believed that a profit motive is largely responsible for the prevailing misunderstanding that there is an inherent contradiction between profit and a company's ability to make a social contribution (Drucker, 1973: 60).

3.1.4 *Defining Corporate Social Responsibility*

As CSR definitions started to proliferate, they became more specific, which caused the term to become commonly accepted during the 1970s (Carroll, 1999:273). The definitional debate on CSR peaked in the 1960s and 1970s (Griseri & Seppala, 2010:9), with fewer definitions added in the 1980s. Once there seemed to be a greater understanding of CSR among the general public, more effort was made by academics to conduct research on the topic, and various organisations attempted to find ways to measure it (Carroll, 1999:291).

In the 1980s but more so in the 1990s, new research emerged on alternative themes, such as corporate social responsiveness, corporate social performance, corporate citizenship, public policy, business ethics, and stakeholder theory and management (Carroll, 1999:284; Carroll & Shabana, 2010:86; Griseri & Seppala, 2010:9). These alternative themes will be discussed in more detail later in this literature review. Due to the fact that CSR was never really rejected during this time, very few unique definitions were added to the body of literature.

From the history highlighted, the last 65 years has seen conflicting opinions (which will be discussed in the next section), and no universally accepted definition for CSR (Griseri & Seppala, 2010:8; Davis, 1973:312). The constantly changing definition of CSR reflects changing needs within society. According to Davis (1973:312), CSR methods can be understood as an organisation's consideration of, and response to, issues beyond the narrow economic, technical, and legal requirements of the firm. It is in the organisation's best interest to assess and manage the effects of its decision-making on the external social system to create value. This will enhance their reputation within society (by helping to address the injustices of the past, especially in South Africa) but more importantly, it will result in a more sustainable and effective long-term business model. Ideally, social benefits will be accomplished alongside and in synergy with the traditional economic gains that an organisation pursues. According to

Davis (1973:313), social responsibility begins where the law ends. Managers need to cleverly adapt to find a way to operate effectively as seemingly rival financial and societal demands continue to intensify (Margolis & Walsh, 2003:296). Economic forces set the limits to what management can and cannot achieve (Drucker, 1973: 58).

Davis (1975:20-23) also generated five propositions for social responsibility. Firstly, businesses have immense social power. All business decisions have a social consequence, whether we like it or not. In that case, these decisions need to be made to protect and enhance society's best interests. Secondly, businesses need to operate as a two-way system. They need to be sensitive towards societal wants and needs and they need to be adequately trained in order to skilfully understand and identify these needs and wants. Thirdly, social costs need to be included and calculated. Historically, technical feasibility and economic profitability used to be the primary grounds in decision-making. Nowadays, social effects are just as important. Fourthly, the 'user pays' principle has become a commonly accepted principle in environmental management circles. Previously, somebody else would pay the price, with the environment being a free good or a public common. Fortunately, things have changed where each service, product, or activity now needs to be included into the equation. Lastly, we as citizens have a social responsibility to behave in an equitably moral and just way. From these propositions, Davis (1975:24) concludes that CSR is not just a fad, but rather a vitally important concept that is here to stay.

Businesses interact with society, and therefore more pressure has been placed onto them to help make a difference. Globalisation has forced large organisations to start operating in countries with much lower living standards than they have operated in before (Smith, 2003:60). Furthermore, with the collapse of communism, democracy is now more widespread. Smith (2003:60) believes that there is also a sense that people now 'matter' in places where, according to those in power, they never used to matter before. This, in theory, provides endless opportunities for societal improvement worldwide.

There is typically a normative case as well as a business case for CSR (Carroll & Shabana, 2010:93; Smith, 2003: 53). The normative case for CSR often reflects a desire to do good, mainly through a moral obligation that seems to have a clear link to an organisation's financial performance. More preferably, a business case for CSR follows an enlightened self-interest,

31

and has direct and indirect links to an organisation's overall performance, beyond only the financial. The latter often results in a competitive advantage for an organisation.

3.1.5   Critics of Corporate Social Responsibility

The strongest argument against CSR is that the main function of business is profit maximisation. The late Milton Friedman (1962) spearheaded this classical economic stance (Carroll & Shabana, 2010:88). He argued that the cost of social involvement is significant; therefore, committing major economic resources towards this endeavour may take away from an organisation's overall profits, which could result in economic inefficiencies (Davis, 1973:318/9). Is social investment then not just a dilution of the primary purpose of business? Friedman believed that the firm should specialise where they have a competitive advantage. Friedman openly believed that social issues should be resolved by the unfettered workings of a free market system (Carroll & Shabana, 2010:88). He highlighted that if this does not happen, the obligation should not fall upon businesses, but rather upon governments and through legislation. He never denied that social problems do exist; he just claimed that is was the State's role to address them (Margolis & Walsh, 2003:272). Keith Davis supports Friedman's argument. He wrote:

> "If we are going to depend on someone to work with social problems, why choose a group which is so poorly qualified? Do we really want economic and technical people meddling in social affairs? Will they broaden their outlook and will their skills transfer? Can business really do the job? Is it better equipped than government and other institutions?" (Davis, 1973:318)

In the author's opinion, there is lots of hype that surrounds Friedman's 'most powerful argument' against CSR, which is widely addressed in literature; yet, Davis receives little credit for his pertinent point. Actually, Davis and Friedman make the same argument, but from opposite ends.

Counter to popular belief, Friedman was not opposed to the idea that organisations have societal obligations that need to be fulfilled; he was only opposed to activities that went beyond the narrowly defined role and capabilities of the organisation (Smith, 2003:64). Friedman claims that:

"there is one and only one social responsibility of business - to use its resources and engage in activities designed to increase its profits so long as it stays within the rules of the game, which is to say, engages in open and free competition, with-out deception or fraud" (Friedman, 1962:60/61).

Friedman had an issue with CSR activities that reduced (profit) focus and in his opinion, placed the firm at a competitive disadvantage and created inefficiency (Smith, 2003:65). According to Smith (2003:65) and many others, it has now become "widely accepted that Friedman's position was founded on an inaccurate economic model and was unrealistic in its attempt to isolate business from society when the two are so interdependent". Firms are potentially well placed to understand and manage their interactions with society.

Davis also highlighted a few other criticisms against CSR. For example, businesses already have enough power, so why should society want to give them any more? He also alluded to fact that there is concern that the cost of social problems will result in a weakened international balance of payments. In summary, he argued that businesses have a huge lack of support when attempting to engage in CSR activities; therefore, businesses should not be held accountable and responsible for their actions (Davis, 1973:319-321).

3.1.6   *Supporters of Corporate Social Responsibility*

There are always two sides to every story. The next section of literature introduces views in support of CSR, of which there are many. Friedman's short-term focus of profit maximisation may have failed to consider the long-term effects of CSR. Instead, according to Davis (1973:313), by benefiting the communities in which one conducts business, long-term profit maximisation often results. This is a healthy climate in which business can be conducted. Furthermore, by making business more humane to staff/employees, turnover and absenteeism may be reduced, recruitment and retention of staff may show improvements, and an organisational culture can grow stronger. Smith and Langford (2011:425) showed in recent studies, predominantly in Australia, that data from 3,147 employees representing 16 organisations shows a significant positive correlation between CSR and employee engagement. The same study concluded that there was little evidence that Corporate Social Performance (CSP) destroys value. Similarly, Margolis and Walsh's (2003:277) research, which looked at

127 empirical studies, found a positive association and very little evidence of a negative association between a company's social performance and its financial performance. This could indicate that CSP can potentially predict future financial performance as employees are more engaged, which makes business more productive. This should incentivise a positive snowball effect not only in developed countries like Australia, but also in developing countries like South Africa. CSR can create value both inside and outside the firm at little/no cost. All of a sudden, CSR now becomes in the best interest of shareholders going forward because by engaging in CSR activities, businesses will see benefits in their triple bottom line.

According to Davis (1973:313), CSR can positively affect the public image of the company. Unfortunately, this has been undermined by disingenuous acts such as marketing teams that have falsely advertised their 'achievements' in an unethical attempt to portray an ideal public image. Sooner or later, these organisations are being found out and their fake reputations are quickly lost. Unfortunately, this results in a significant reduction in the public's trust in the concept of CSR. At this point, attempting to rectify the status is no easy feat.

Business leaders and organisations are responding to society's calls to enhance CSR (Margolis & Walsh, 2003:270). If businesses do not respond to the needs of society as they arise, others will. Davis (1973:313) refers to this as the viability of business. Problems can be turned into profits. Managers who fail to react to social responsibilities will experience negative and restraining effects on industry (Peterson & Jun, 2009:385). According to Davis and Blomstrom (1971:95), this is referred to as the Iron Law of Responsibility: "in the long run, those who do not use power in a manner which society considers responsible will tend to lose it". Often criticism of CSR is aimed at large organisations; who are in the limelight. Instead of allowing situations to escalate, it is more economical to deal with issues sooner rather than later (Davis, 1973:317). Prevention is better than cure i.e. being proactive in creating social value.

Many people highlight that CSR activities are often embraced to avoid government regulation, new legislation, and potentially more intense application of existing regulation, as well as to keep freedom in the decision market (Carroll & Shabana, 2010:89; Davis, 1973:314; Peterson & Jun, 2009:385). Conversely, Reich (1998:16), maintains that it would be in our best interests to support such regulations in the long-term. He believes that this would reduce free-riders and it would ensure that voices of stakeholders other than shareholders are heard. Perhaps Reich's view has some merit. It is only a matter of time. Eventually the pressures will grow stronger

and public interests will be expressed within the system of corporate governance (Reich, 1998:17). His views show a lot of foresight, warning managers to act in the best interest of all stakeholders as the movement toward better and more responsive 'corporate governance' is upon us. Which approach is more efficient, top-down regulation or self-regulation? In this instance, it is clear that self-regulation has not worked in the past, hence the rise of CSR, so top-down regulation was needed.

Lastly, in bringing an end to the views that support CSR, organisations may not be fully qualified to address social issues; if they have the resources, however, which they often do, why not at least let them try (Davis, 1973:316). Governments are forever seeking financial support and have more than enough to address already. Micklethwait and Wooldridge (1997: 82) highlight this explaining that in *The Age of Discontinuity* by Peter Drucker, he showed his lack of enthusiasm towards government because "the job of governments was to govern rather than to try [to] do things that could be done by the private sector". Perhaps the ideal is for government to set a framework that encourages self-regulation. One, this could do no harm, and two, businesses could do well where they can. Direct government regulation does not necessarily give better results; sometimes, leaving things to be solved by a market or firm is the more feasible option.

3.1.7   *Archie Carroll's famous Corporate Social Responsibility pyramid*

Carroll (1991:40) indicated that attention should be shifted from CSR to corporate social responsiveness. This is interesting because the word responsibility comes with the connotation that CSR is an obligation for the business, whereas responsiveness is more about corporate proactive action and the implementation of a social role.

From this, Carrol (1991) developed a framework, commonly referred to as the pyramid of CSR (see Figure 5), which has been designed for all business professionals to embrace the entire range of business responsibilities. The pyramid comprises four basic components. First and foremost, as one would expect, the economic section makes up the base of the pyramid. Carroll (1991:41) reiterates that profit is the primary motive of an entrepreneur, so all other business responsibilities are predicated upon an economic one. Second, a legal section is included because organisations are expected to comply by the law when chasing a profit motive. This may be partial fulfilment of the unwritten 'social contract' that certainly exists (Carroll,

1991:41). Third, an ethical section is important because some practices are prohibited or expected by members of society, which are not covered by the law. As Carroll (1991:41) states, "ethical responsibilities embody those standards, norms, or expectations that reflect a concern for what consumers, employees, shareholders, and the community regard as fair, just, or in keeping with the respect or protection of stakeholders' moral rights". Last, a philanthropic section completes the pyramid because businesses need to be good corporate citizens, promoting human welfare and goodwill (Carroll, 1991:42). Over time, the ethical and philanthropic functions have become more important because these are more discretionary and voluntary than the preceding two functions.
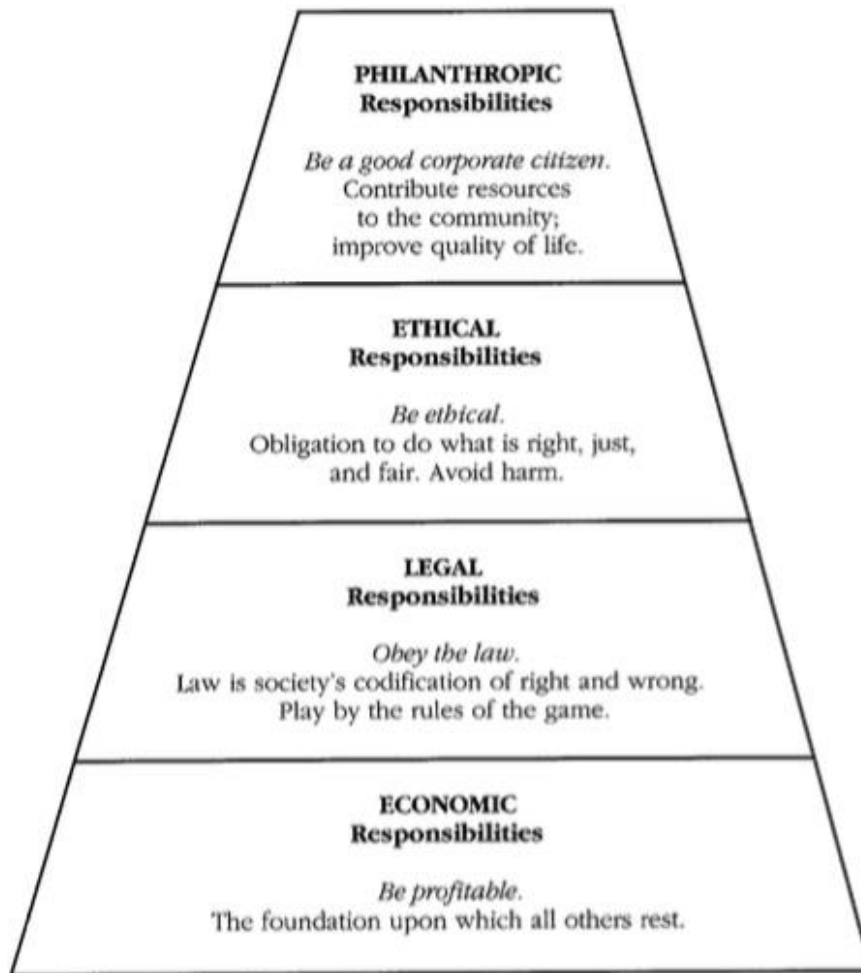
Figure 5: The pyramid of Corporate Social Responsibility (Carroll, 1991:42)

3.2   CREATING SHARED VALUE

3.2.1   The introduction of Creating Shared Value

The author purposefully omitted Porter and Kramer's (2011) views on CSR in the above critic's section due to the fact that it will provide more significance to the reader while introducing CSV instead. According to Porter and Kramer (2011:4), the more that businesses have begun to engage in CSR activities worldwide, the more they are being blamed for society's failures. As strong critics against aspects of CSR, Porter and Kramer (2011) have attempted to arrive at a framework that brings business and society back together. Although their notion seems somewhat idealistic, their initial article generated much interest within the academic and business strategy world. Their extremely well written article begins by stating that "the capitalist system is under siege", which catches the reader's attention (Porter & Kramer, 2011:4). Porter and Kramer (2011:4) follow this profound introduction with statements such as "in recent years business increasingly has been viewed as a major cause of social, environmental, and economic problems" and "companies are widely perceived to be prospering at the expense of the boarder community". Porter and Kramer (2011:4) claim that most companies are stuck in a CSR mind-set in which societal issues are at the periphery and not the core. As a result, they developed a business strategy called CSV, where economic value is created in a way that also creates value for society by addressing its needs. According to Porter *et al*. (2011:4), CSV is not social responsibility, philanthropy, or even sustainability, but a new way of achieving economic success.

3.2.2   Defining Creating Shared Value

Unlike CSR, CSV is still in its infancy. The term was first coined and explored by Porter in a 2006 publication (Crane, Palazzo, Spence & Matten, 2014:131; Kvistgaard, 2013:37; Porter *et al*. 2011), but it was continuously developed and then finalised and accumulated in a more recent article entitled *Creating Shared Value* which was published by Porter and Kramer in the Harvard Business Review in 2011.

It is difficult to understand exactly what CSV is really about. Despite the sole purpose of Porter and Kramer's (2011) article, *Creating Shared Value*, being to introduce the concept, Kvistgaard (2013:45) points out that the term is never defined. The term is only described as a way of thinking about a corporate CSR strategy, knowing that it is difficult to understand or define it as an exact theory or business model. Instead, the word framework has been alluded

to on a number of occasions. Porter and Kramer (2011:6) do however define shared value as "policies and operating practices that enhance the competitiveness of a company while simultaneously advancing the economic and social conditions in the communities in which it operates". According to Pfitzer, Bockstette and Stamp (2013:4), CSV entails incorporating a social mission in the culture of a company and effectively channelling resources in a sustainable way to the development of innovations that may assist in solving social problems. CSV will benefit society by unleashing the power and ability of business to help solve fundamental global problems (Porter, Hills, Pfitzer, Patscheke & Hawkins, 2011:1). This is where the shift from CSR to CSV needs to transpire. According to Porter and Kramer (2011:4), too many companies are trapped in an out-dated, narrow-minded, and value-creation approach to business, looking to optimise short-term financial performance where societal issues are at the periphery and not the core. The sooner this approach can change and companies learn to move beyond the trade-off, the better.

3.2.3 The Creating Shared Value concept gaining momentum

Since Porter has become known as the father of modern corporate strategy (Kvistgaard, 2013:1), his CSV framework has gathered momentum in business and among academics worldwide. Due to his reputation, Porter's article reached The Economist, The Huffington Post, The New York Times and The Guardian (Crane *et al*., 2014:132), and has been embedded into the official European Union (EU) strategy for CSR. Leading food and beverage multi-nationals such as Nestlé and Coca Cola also started to embrace the concept of CSV giving it much traction (Crane *et al*., 2014:131/2). Others have followed suit, especially given the fact that Porter and Kramer have been working closely with Nestlé through their consultancy Federal Supply Group (FSG). It would be safe to state that CSV has been met with considerable success. Even Crane *et al*. (2014:150), who wrote one of the most cited and critiqued articles aimed at Porter, admit that CSV has an appeal because it makes significant progress in bringing much needed attention to the social dimensions of business and may enhance better practice as a result.

Nestle have acted as a pioneer and adopted the CSV mind-set and, in doing so, have transformed the city of Moga and its people in India (Biswas & Biswas-Tortajada, 2014:1). Essentially, CSV is about creating economic value in a way that also creates value for society by addressing its needs and challenges (Porter & Kramer, 2011:7). Porter and Kramer (2011:7)

go further to suggest that this is the next major transformation of business thinking. Pfitzer *et al*. (2013:3/4) studied more than 30 companies that they believe are innovating for shared value. They recommend that five mutually reinforcing elements are key to deliver social benefit and financial success concurrently:

- Embedding a social purpose as part of the corporate culture (potentially the most important step).
- Rigorously defining the social need including understanding the needs and how best to change them.
- Measuring shared value (no universal system exists for achieving this yet).
- Creating the optimal innovation structure (obtain philanthropic and government support).
- Co-creating with external stakeholders (deeply involving all stakeholders).

Naturally, this new framework has received resistance and criticism, but it has also already generated attention and praise (Kvistgaard, 2013:1).

3.2.4   *Critics of the Creating Shared Value framework*

Not all academic researchers and business professionals buy into the CSV concept and the proposed framework. In fact, Beschorner (2013:108) highlights that by publishing in the Harvard Business Review, the audience has been chosen rather carefully. He suggests that Porter and Kramer's views on CSR and CSV neither reflect an academic debate, nor capture today's CSR practices accurately (Beschorner, 2013:109). Porter and Kramer's particularly limited understanding of CSR is reflected in their article when they suggest that CSR is 'separated' rather than 'integral' to profit maximisation which ignores decades of research with regard to the business case of CSR (Beschorner, 2013:109). According to Crane *et al*. (2014:134) "this is, at best, a very narrow reading of a broad literature and, at worst, disingenuous". It would therefore appear that one of the serious shortcomings of CSV is its lack originality and being strikingly similar to CSR, social innovation, and stakeholder management. As the author has previously touched on, due to the lack of definitional clarity on CSV by Porter and Kramer, can any corporate activity that benefits both business and society now be referred to as CSV (Kvistgaard, 2013:59)?

According to Crane *et al*. (2014:137), Porter and Kramer alluded to the fact that legal compliance is a given and that moral standards are adhered to when talking of CSV; unfortunately, this is certainly not always the case. Kvistgaard (2013:61) argues that within CSV, the realistic trade-off between economic and social value creation has been ignored. Rather than having a trade-off, economic and social value could be synergistic and not a zero-same game. It can be extremely difficult to maintain both social and financial goals. Vogel (2005:42) has demonstrated that behaving more virtuously does not necessarily make a firm more profitable. A combination of different factors may be at play.

In the author's opinion, the largest concern surrounding CSV is its lack of measurability. Due to the fact that the CSV framework is still in its infancy, it will take time to develop a methodology and test the results.

3.2.5   *Measuring shared value*

There is currently no proven way to measure the shared value that is generated and enjoyed between society and business. The main difficulty is determining the degree to which social performance improves (or detracts from) economic value (Porter *et al*., 2011:2). Porter and colleagues soon realised this drawback and published a methodology in the same year as *Creating Shared Value* to understand a link between economic performance and social value. To date, efforts to prove that a linkage between economic performance and social value exists have failed to provide conclusive evidence (Porter *et al*., 2011:13). It is also important to understand that CSV measurement should not be used as a replacement to other measurement approaches, but should rather be performed in conjunction with them.

Porter *et al*., (2011:10) highlight the fact that organisations often track social impact or environmental performance independent of financial results and vice versa. Social impact assessments can provide stakeholders with an idea of the value and benefits that are being derived in local communities. According to Porter *et al*., (2011:4) "shared value measurement requires an interactive process that is integrated with business strategy, not a one-time or periodic effort separate from measuring business performance". They recommend a four-step approach to determine the actual shared value that is being created between business and society:

- Identify the social issues to target (opportunities to increase revenue or to reduce costs).

- Make the business case (will social improvement directly improve business performance, targets, and costs involved).

- Track progress (inputs, outputs, and activities relative to projections).

- Measure results and use insights to unlock new value (have corporate resources and efforts produced a just return or not?).

3.2.6   Creating Shared Value in South Africa

With a modern business sector alongside poverty/social problems in South Africa, there is not much literature about CSV, despite the need. According to Siegruhn (2002), many empowerment initiatives have failed in South Africa and in the developing world because little emphasis has been placed on the importance of shared values in the reconstruction of third world societies.

Tourism, mining, financial services, manufacturing, retail, agriculture, and communications are the key drivers of economic growth and contribute toward the GDP in South Africa (Hills *et al*., 2012:58). In the last decade, some of the pressing social issues in South Africa include black economic empowerment, unemployment/job creation, AIDS, energy supply, income disparity, and low access to affordable housing, among others.

The food, beverage, and agriculture sector and the extractives and natural resources sector are two of the largest employers of people in the developing world (Hills *et al*., 2012:18 & 31). In South Africa, many communities have basic needs such as education, sanitation, infrastructure and healthcare, which government and other NGOs have struggled to address. Businesses in South Africa need to be encouraged to formulate business strategies that reduce social problems and simultaneously result in a financial gain (Hills *et al*., 2012:10). Some businesses are beginning to investigate CSV in South Africa; however, a change in the pure corporate philanthropy mind-set would need to materialise before this becomes entrenched in corporate governance. Nestlé, again, have shown some initiative in being a major role model within the CSV mould. According to Oberholster (2013:176):

> "In South Africa, an example of CSV in action is the Agri-BEE programme, a partnership between Nestlé South Africa, the Ministry of Agriculture, Independent

41

Development Trust and other organisation to provide institutional support and funding to more than 40 farmers in Harrismith, Free State, where Nestle is the biggest milk buyer. Nestlé procures milk from local farmers and helps them with funding, procurement, milk tanks, dairy infrastructure and certification, enabling them to compete in the market".

3.3   CONCLUSION

Despite suggestions of steering 'away' from CSR initiatives towards alternative themes, CSR type initiatives are vitally important, no matter what new phrase it now goes by. What is far more important than the term itself is the method adopted and results achieved for benefiting the greater society. Carroll (1999:292) concluded that, "it appears that the CSR concept has a bright future because at its core, it addresses and captures the most important concerns of the public regarding business and society relationships". The term CSR is still widely used and serves as a reference point for the more recently introduced alternative themes. Griseri and Seppala (2010:9) argue that the variety of meanings of CSR might in fact be its greatest strength, as this provides opportunities to link the term with many different aspects of business. The risk, however, is that once the term has been overused in too many different contexts, it may suffer the same fate as many other popular terms in management literature; for instance, it might then be applied to almost anything and start to lose all meaning (Griseri & Seppala, 2010:5). Unfortunately, CSR often deals with rather defensive approaches when in fact businesses should be seen more as proactive societal actors (Beschorner, 2013:107). Quite simply, today it is no longer about whether businesses should be responsible to society or not, or whether to make substantial commitments or not, but rather about how businesses should go about doing it (Reich, 1998:9; Smith, 2003:55).

It is extremely difficult to gauge the effectiveness of CSV at such an early stage. Many organisations have only started to adopt elements of its framework within the last decade. It is no hidden secret that transforming a society takes time, especially if the goal is to have a positive and long-lasting impact (Biswas & Biswas-Tortajada, 2014:1).

This research therefore undertakes to perform an explorative study to assess if shared value can be created or is already being achieved by an organisation within the eco-tourism industry in South Africa. Is shared value being experienced between the company that operates an eco-

tourism lodge within a protected area and two of its immediate neighbouring communities? Is there a need for CSV/CSR, where modern businesses are positioned alongside communities with serious social and environmental challenges and a history of prejudice, relocation, and disempowerment? Some complex moral questions may not have answers, but eco-tourism could be the vehicle to create shared value with few costs and many benefits.

CHAPTER 4. RESEARCH METHODOLOGY

Chapter 2 argued that protected areas, especially private protected areas, can promote conservation and development, but should also seek specifically to uplift poor rural communities who are often neighbouring such areas. Chapter 3 defined the focus on neighbouring communities in terms of the emerging concepts of CSR and CSV. These arguments have led to three research questions, for which a case study approach is used to answer them.

4.1   RESEARCH QUESTIONS

1.   Is shared valued being created between andBeyond Ngala Private Game Reserve and Welverdiend and Hluvukani communities?

2.   Is there a match or mismatch between the perceived value created by the reserve's senior management and the actual value these communities understand they receive in the form of benefits?

3.   Is there a match or a mismatch between the ideas that the two stakeholder groups (senior management and the communities) believe will strengthen their relationship in the future?

4.2   METHODOLOGY AND DESIGN

A research design is simply the logic that connects the data to be collected and the conclusions to be drawn to the initial questions/objective of the study (Yin, 2003:19). Zikmund (2002:55) refers to an exploratory study as research that provides information to use in analysing a situation and not necessarily to uncover evidence to determine a particular course of action. The content of this research took the form of a mixed-method case-study approach. As all the data was collected at a single point in time, it can be regarded as a cross-sectional study (Baker, 1994:112). A case study can be defined as group observation studies and field research, often confined to a single field setting/environment (Baker, 1994:236).

A case-study approach was selected to answer the research questions because it allowed the opportunity to understand more about the development of the company. The prospect of

understanding specific individuals' views to recognise the complexities within the actual work environment was beneficial.

This study was conducted using a non-empirical literature review and an empirical mixed-method data collection approach. Qualitative primary data was gathered through structured interviews and then modified into quantitative data through content analysis. The nature of this data was both numerical and textual and was presented in tables and graphs, which allowed for an in-depth description and understanding of the information. By quantifying qualitative constructs, they become more tangible and easier to understand. Initially, the study was exploratory because it identified benefits through interviews. As the study unfolded, the researcher learned that it was easier to categorise constructs, which then required a more quantitative approach.

Face-to-face interviews were the preferred data collection technique. According to Yin (2003:86), an interview's greatest strength is that the collected data is targeted and insightful. Researchers must be wary of bias in terms of poorly constructed questions and response bias. The data collected in these interviews was intended to provide more insight into what effects the wildlife property has on the local community, and whether there is a match or mismatch between the perceived value created by the reserve's senior management and the actual value the community understand they receive in the form of benefits. The same method for collecting data will be adopted for exploring how both parties can improve the relationship. Ideally, ideas from both parties would result in a common shared value. Once the results are collaborated and recorded, and once the study is completed, the results will be shared with all the parties concerned.

Historically, case studies have often been criticised for having insufficient precision, objectivity, and rigor (Yin, 2003:xiii). Due to these lasting stereotypes, research methods are often challenged and the insights derived from these studies are frequently under-appreciated. Case studies continue to be used extensively in many forms of social science research, and they are also often preferred in thesis research. If case studies were no longer perceived as being a beneficial research tool, they would no longer be used; this therefore suggests that their advantages must outweigh their disadvantages.

4.3   CASE SITE / SAMPLE POPULATION OF BENEFICIARIES IN THE SELECTED COMMUNITIES

andBeyond Ngala Private Game Reserve was selected as the study site because the researcher has been employed there as a ranger since May 2010. It was not selected at random or from a selection of andBeyond lodges. The researcher has had a fascination in the way that andBeyond conduct business and the way in which the company go about uplifting people in local communities. The company stands by the motto: "Doing well by doing good" (andBeyond, 2016). This motto means that before they can turn over a profit, it is engrained within the company culture to reach out those less fortunate, especially people living in the rural areas that neighbour their areas of operation.

No financial support or time off was provided by andBeyond as the study was completed alongside the daily responsibilities of the researcher as an employee of the company. The data collection in the communities was an extremely humbling experience.

As detailed already in Chapter 2, Section 2.7, Welverdiend and Hluvukani are both situated in the province of Mpumalanga, South Africa. These two communities also fall within the Ehlanzeni district, under the local municipality of Bushbuckridge. The racial make-up of the local residents in these communities is over 98% African black people, with the predominant language being Shangaan (andBeyond, 2016). These were the first two communities targeted by andBeyond and the Africa Foundation to make wildlife more valuable to the neighbouring communities to andBeyond Ngala Private Game Reserve.

Welverdiend is adjacent to the KNP on the western side about 15 km outside of the Orpen gate, directly opposite the South African Wildlife College. The population is estimated at 8,000 people, with roughly 1,200 households. Although slightly smaller than Hluvukani, Welverdiend is the closest community to andBeyond Ngala Private Game Reserve.

Neighbouring Welverdiend, Hluvukani, lies west of the Manyaleti Game Reserve and south of the R531. This community has an estimated population of 10,000 people. Hluvukani could be considered the hub of the immediate area because it receives the bulk of government support in the form of a medical clinic, library, and social welfare offices.

There was no use of control communities that andBeyond have not benefited. The Welverdiend community has already been the subject of two previous studies by Spenceley (2001) and Hendry (2002) so this study was a great opportunity to update their findings and to determine what has/hasn't changed in 14 years.

4.4   SAMPLING AND SAMPLING METHOD

Due to the complexity of this study, the non-probability technique called quota sampling was best suited to determine from whom data was collected. In non-probability sampling, there is no way of estimating, forecasting, or guaranteeing that each section of the population will be represented in the sample (Leedy, 1999:200). With quota sampling, groups are defined, the sizes are then determined, and the individuals who best fit these descriptions are then selected wherever they can be found (Baker, 1994:163). The purpose of this form of sampling is to ensure that various subgroups in a population are represented. Convenience, speed of data collection, and lower costs are the main advantages to quota sampling (Zikmund, 2002:384). It was decided that the sampling would therefore be grouped into eight quotas, listed in Table 1.

The selected quota groups are the stakeholders directly involved the relationship of interest. Specific senior management and Africa Foundation staff were selected as they were almost exclusively the only ones involved in driving the operations that effect this relationship between andBeyond Ngala and the local communities. This, therefore, made the sample approximately 90% of the population. From an andBeyond Ngala guest perspective, a small sample of 10 was selected purely on convenience; visitors that were at the lodge during a short 2-day period of data collection. All employees that were working at andBeyond Ngala and living within Welverdiend and Hluvukani were interviewed, except those that were on leave during the data collection period. This sample made up approximately 85% of the desired population. These employees were from all lodge positions (back of house and front of house) except senior management, as these individuals fell into the first quota. Lastly, community members were selected at targeted sites by randomly approaching individuals. This was extremely time consuming and the sample collected was less than 1% of either of the communities populations.

Table 1: Stakeholder groups selected for this study of shared value

Stakeholder Grouping	Appendix	Interview Guideline Used	Sample Size
andBeyond Senior Management	A	1	5
Africa Foundation employees	A	1	3
andBeyond Ngala lodge managers	A	1	2
Guests of andBeyond Ngala Private Game Reserve	B	2	10
Employees of andBeyond Ngala residing in Welverdiend	C	3	6
Employees of andBeyond Ngala residing in Hluvukani	C	3	12
Non-employees of andBeyond Ngala residing in Welverdiend	E	4	23
Non-employees of andBeyond Ngala residing in Hluvukani	E	4	15
			76

These quotas formed a comprehensive sample of 76 relatively in-depth interviews, which enabled the researcher to answer the study's research questions. Face-to-face quota sampling was used for eight different sets of participants in the value chain.

4.5   INTERVIEW GUIDELINES USED

The objective was to carry out approximately 75 structured interviews to collect data. The interview tool may be used to describe attitudes and behaviours, to explain relationships that test hypotheses and challenge theories, or to evaluate institutions or programmes (Baker, 1994:38). All participants signed a consent letter to participate in the research (see Appendix F). Four separate interview tools were designed and conducted, with care being taken to plan and accurately word the interview questions (Leedy, 1993:192). All interviews contained structured, open-ended questions because open-ended questions are particularly useful in exploratory research and are most effective at the beginning of a questionnaire (Zikmund, 2002:361). These questions often elicit feelings from the interviewees and can add substance to fixed response questions. By this time, the researcher had conducted preliminary discussions and had piloted the interviews on respondents, thus allowing him to categorise responses. Reviews of the draft questionnaires were scrutinized together with the researcher's supervisor with many years of field experienced and then the 4 interview guidelines were finalised.

In the employee and non-employee community interviews, large sections of the interview tool were limited to fixed responses. This was purposefully included to allow for easy analysis and interpretation of data, and to simplify the respondents' understanding of the questions. Some

language barriers existed, so a translator was used to overcome this limitation. Some prompting was also used in order to derive more precise and accurate information.

Interview Guideline 1 (see Appendix A) was designed for senior management of andBeyond and lodge managers at andBeyond Ngala Private Game Reserve, as well as for employees of the Africa Foundation. Questions within this interview are conceptual and intellectual, specifically targeting an individual's understanding of business strategy, their perceptions of achievements of the benefits realised in local communities, and some concerns and recommendations with regard to partnerships going forward. Each interview lasted between 30-60 minutes. In most cases, the interviewee was asked if he/she minded if the conversation was voice-recorded, so that the researcher could go back to the recording to verify responses if necessary.

Interview Guideline 2 (see Appendix B) was designed for guests of andBeyond Private Game Reserve. Questions within this guideline addressed the guests' understanding of the work that andBeyond and the Africa Foundation currently performs in the local communities. The questions also touched on their reasons for deciding to travel with andBeyond. These interviews were included to provide an additional, objective viewpoint to assess the importance of the relationship between a protected area and local communities. Interviewing guests of a particular company trialled an interesting aspect of understanding the relationship between a company and local communities. This requires more attention in future studies. Interviews lasted approximately five minutes.

Interview Guideline 3 (see Appendix C) was designed for employees of andBeyond Ngala living in either of the two communities. Employees were not asked to specify their job title, in order to strengthen the likelihood of honest answers. Questions were broken up into two sections. In the first section, open-ended questions addressed the nature of the relationship between andBeyond and the community. Some questions revolved around identifying the benefits received by the community as a result of their relationship with andBeyond, if any. Interviews lasted approximately 5-15 minutes. Managers at the various lodges were extremely accommodating and had informed their staff of this research.

The second section of 20 questions asked respondents to rank their attitudes and feelings towards a specific construct. These questions were developed predominantly from the content analysis performed after the first round of interviews with senior management. A specific focus

49

here was to include questions around the perceived benefits that were identified by senior management to see if these same benefits were actually realised by the communities living adjacent to a protected area. This section of the interview used a 5-point Likert rating scale. The researcher read the respondents two opposite statements respondents had to point to one of the five attitudes and feelings that they felt were most appropriate. These attitudes and feelings were translated into Shangaan and accompanied with facial expressions for ease of understanding (see Table 2). These faces and translations were given to the respondents on a piece of paper and they were asked to point to their appropriate response (see Appendix D). These interviews lasted approximately 10-20 minutes.

Table 2: Translations for Interview Guidelines 3 and 4

Facial Expressions	Shangaan/Tsonga	English
☺☺	Ni tsake ngopfu swinene	Very happy
☺	Ni tsakile	Happy
😐	A ni switivi	I don't know
☹	Ni kwatile	Angry
☹☹	Ni kwatile ngopfu swinene	Very angry

With the help of an independent translator, 'back translation' was used to ensure that these translations were correct (Zikmund, 2002:361).

Interview Guideline 4 (see Appendix E) was designed for people who are non-employees of andBeyond Ngala and living in either of the two communities. Questions were identical to that of Interview Guideline 3, but respondents were asked their job title, and the question "I am (am not) proud to work at Ngala?" was omitted. This interview was designed to question community members about benefits received from and attitudes towards a pre-determined protected area close to their community, and to gauge their perceptions and depth of understand of this relationship. Names, ages, and sexes of respondents were not significantly beneficial to the outcomes of this research and were therefore omitted. The attitudes of residents within Welverdiend and Hluvukani who were not employed by andBeyond produced some intriguing results.

4.6   DATA COLLECTION

10 senior management interviews (andBeyond management, andBeyond Ngala management and Africa Foundation management) were conducted according to a set schedule. This schedule is provided in Table 3.

Table 3: Senior management interview schedule

Position	Company	Location	Date	Type
Field and Sustainability Director	andBeyond	Bataleur House, JHB	17/03/2016	Face-to-face
South African Regional Director	andBeyond	Bataleur House, JHB	17/03/2016	Face-to-face
Financial Director	andBeyond	Bataleur House, JHB	17/03/2016	Face-to-face
CEO	Africa Foundation	Bataleur House, JHB	17/03/2016	Face-to-face
Tented Camp Manager	andBeyond	Ngala Tented Camp	21/03/2016	Face-to-face
South African Regional Manager	andBeyond	Ngala Safari Lodge	22/03/2016	Face-to-face
Mpumalanga Programme Officer	Africa Foundation	South African Wildlife College	22/03/2016	Face-to-face
Mpumalanga Programme Officer	Africa Foundation	South African Wildlife College	22/03/2016	Face-to-face
Group Conservation Manager	andBeyond	Bryanston, JHB	30/03/2016	Telephonic
International CEO	andBeyond	Bataleur House, JHB	19/04/2016	Skype

Guest interviews were conducted on the 10th and 11th of April 2016. The sample was purposefully kept small. Firstly, the interviewees were on holiday and did not need to be bothered with anything more laborious. Secondly, the researcher did not want guests to feel obliged to answer questions in favour of andBeyond because he was an employee and was interacting with them while in uniform. Lastly, if they were not aware of the work that andBeyond were currently doing in the local communities, he did not want to feel the temptation to shift his role from researcher to that of an informer/marketer for andBeyond. A few short interviews were nonetheless revealing. Those guests that specifically travel to andBeyond because of community development opportunities would most likely want to participate in this research; however, andBeyond's development opportunities is probably not every guest's primary reason for selecting to travel to andBeyond.

A challenge during conducting the staff interviews was trying to schedule time out of their busy days while they continued to fulfil their demanding daily duties because these exclusive lodges were still in operation. Both managers and the researcher carefully explained to the staff that their confidentiality would be ensured and that their participation was completely voluntary. Only one employee preferred not to partake. Mention must be made that the results could have been slightly different if a completely independent and objective individual had

performed the interviews. The researcher does not necessarily believe this would be the case as the employees were ensured of confidentially and it was explained that their honestly could help to improve the relationship between andBeyond Ngala and their community. The researcher decided against voice-recordings of responses to ensure that the participants were not placed under any unnecessary stress.

Community interviews were conducted between the 11th and 15th of April 2016. The Africa Foundation Mpumalanga Programme Officer, Vusi Nkuna, was able to assist with direction and specific contacts within the local communities; for this, the research is eternally grateful. In order to incur minimal disturbance on households within the communities and in accordance with the wishes of tribal authorities, interview questionnaires were held on a face-to-face basis at convenient but well frequented places. These random meeting places were targeted within each community in an attempt to produce an even geographical spread of responses. This was important, as residents from specific parts of a community may feel differently/neglected compared to those from other parts of their same community. Crèches, schools, clinics, home-based care centres, computer facilities, churches, petrol stations, and spaza shops were among the places where the interviews were conducted. The respondents were made up of teachers, community development forum leaders, builders, general workers, administrators, security guards, baby sitters, students, home-based care givers, interns, chefs, centre managers, nurses, spaza shop owners, and unemployed residents. Potential respondents were randomly approached to ask if they were interested in participating in the research.

All research subjects appeared interested in the research and agreed to participate in the interview. The researcher and translator were not dressed in any company uniform, so as not to sway the results. The researcher briefed potential participants about the purpose of the study and mentioned that he was a student at the University of Stellenbosch. All participants signed a consent letter before participate in research. Residents from both communities were equally friendly and extremely welcoming, particularly the children who all shouted "mlungu" (meaning 'white' in Shangaan) when the researcher entered an establishment.

On the whole, although a translator was always present, most respondents were happy to conduct the interview in English. The researcher was impressed by the literacy skills of most respondents. This may or may not be as a direct result of the work that andBeyond Ngala have

performed over the last 25 years. Perhaps this may also be attributed to the fact that most participants happened to be employed.

At first, some of the respondents appeared confused with answering questions using the 5-point Likert rating scale. With the help of a thorough explanation, the facial expressions, and the translation of words into Shangaan on a blank page, they were all able to complete this task without an issue. The respondents tended to favour the end-points or limits of the scale. Zikmund (2002:308) suggests that an attitude is usually viewed as an enduring disposition to respond consistently in a given manner to various aspects of the world, including people, events, and objects. It was for this reason that the researcher included some questions that measure the same or very similar constructs twice, to double-check responses and improve the accuracy of results.

The data was collected in April 2016, around the same time that South African nationals registered to vote in the nationwide municipal elections. This could have had an influence on the final results, especially in the light of the turbulent political environment, the fall of the South African rand, and the corruption charges against President Jacob Zuma.

4.7   DATA ANALYSIS AND INTERPRETATION

Data was gathered from the interviewees in their work environment or home community. The researcher felt this to be beneficial. Content analysis was performed in order to obtain an objective, systematic, and quantitative description of the communication (Zikmund, 2002:248). This technique was designed to measure the extent of emphasis, or omission of emphasis, on specific constructs. This was done by eye and not by a computer programme. The bulk of the data collected was qualitative, and it was quantified through content analysis to demonstrate frequencies. In this case study, the frequency of matching responses from participants made up the constructs that were then recorded, measured (as a percentage), and analysed. This data reflects a simple form gathering helpful information to make for easy interpretation of the results, which are presented in the next chapter.

4.8   LIMITATIONS OF THE STUDY

It must be cautioned that exploratory research does have some limitations. The attempted objective interpretation of these findings is based on an individual's judgement, meaning that this research technique cannot provide precise quantitative measurement (Zikmund, 2002:133). The samples are not representative, so generalisability of the results is somewhat restricted.

Future research could elaborate on this study using different sampling techniques to see if similar results are achieved. As with most sampling techniques, the larger and more representative the sample, the more accurate the results are likely to be. Both Welverdiend and Hluvukani are large communities, so a much larger sample in excess of 500 interviews per community would be ideal. This would require more time and personnel than were available for this study. It would also be invaluable to track an individual's attitudes over time, in the form of a longitudinal study (Baker, 1994:112). From the finding of Spenceley (2001) and Hendry (2002), to a certain extent this was achieved in the Welverdiend community, but not with Hluvukani.

4.9   VALIDITY AND RELIABILITY

According to Yin (2003:37), external validity is about knowing whether a study's findings are generalisable beyond the immediate case study. In this case study, the work performed by andBeyond working hand-in-hand with the Africa Foundation is replicated in areas within 50 km of all 29 lodges on their portfolio. Therefore, the goals and benefits that senior management believe they have and are still achieving in local communities can be, for the most part, generalised across the whole portfolio. The results would depend on specific factors and therefore could be variable in other communities. Replication of this study or similar research in these regions would be beneficial.

A reliable study is one where a later investigator can reach the same findings and conclusions if they were to follow the same procedures described by an earlier investigator and conducted the same case study all over again (Yin, 2003:37). Reliability also deals with accuracy (Leedy, 1993:42); therefore, the accuracy of the tool of measurement is vitally important. In this case, the researcher designed a measurement tool in the form of carefully conducted interviews, followed by thorough content analysis. As very few existing measurement tools that the researcher felt were suitable for this research were available, designing interviews took time,

especially as some questions in the community interviews were derived from the answers provided during interviews with senior management.

4.10   BIAS AND ETHICS

From an ethical standpoint, permission was obtained from andBeyond and the Africa Foundation for the study. The final results will be shared with all parties involved once the study is completed. All participants targeted for interviews are voluntary and informed consent was mandatory. Baker (1994:79) reinforces the notion that informed consent is only achieved in a study if an interviewee knows what the study is about, understands his/her level of confidentiality, comprehends the objectives of the study, and agrees to cooperate. All interview documents will be kept confidential. According to Baker (1994:79), confidentiality is a promise to restrict the knowledge of the identities of all interviewees to only the researcher and selected members of the research (e.g. the supervisor) to minimise the possible exposure of an interviewee's identity.

Leedy (1993:215) cautions that it would be unethical if a researcher failed to acknowledge the likelihood of biased data or to recognise the possibility of bias in a study. The fact that the researcher is currently employed by andBeyond makes the above statement that much more pertinent. Despite the researcher's direct association with andBeyond, the results were recorded as objectively as possible. In sum, Zikmund (2002:90) advises that "the researcher is expected to adhere to the purpose of the research; maintain objectivity; avoid misrepresenting research findings; protect subjects' and clients' right to confidentiality and avoid shading research conclusions".

CHAPTER 5. DATA ANALYSIS AND RESULTS

This section is presented in sequential order, mirroring the interviewing schedule that was completed by the researcher. Many of the results from the content analysis will be presented as a percentage of the given sample, no matter the size of the sample, in order to keep consistency. These results could be generalised for the population, in order to get an idea of the perceived benefits or improvements identified by management or the different attitudes and value that residents within each community actually realise.

5.1   MANAGEMENT INTERVIEWS

This section analyses the open-ended questions from interviews with senior management and lodge managers of andBeyond, as well as employees of the Africa Foundation. All participant responses to the 11 open-ended questions within Interview Guideline 1 are reported and described. The most prevalent responses/constructs are highlighted in light green in the respective tables, in order to indicate their importance.

5.1.1   Understanding Corporate Social Responsibility

Ten interviews elicited 62 different responses to question 1, which were categorised into 26 constructs (see Table 4). The top six ideas were are follows. 90% of managers recognised the importance of uplifting and working with communities as partners, while 60% identified the importance of environmental stewardship. 40% suggest that educating communities on new concepts and skills is important, while 30% of managers stated that CSR was ingrained in their management culture, and that companies needed to contribute to this. Similarly, 30% of the respondents said that CSR was multi-faceted, and 30% felt that there was still room for improvement.

These results suggest that andBeyond managers associated CSR with communities and the environment. Beyond the quantitative data, managers were outwardly passionate about CSR, and it was humbling to see that 30% of them believed there was still more room for improvement.

Table 4:   What are your thoughts on Corporate Social Responsibility and what are andBeyond/Africa Foundation looking to get out of it?

#	Construct	Frequency n = 10	Percentage
1	Uplifting neighbouring communities and working with them as partners	9	90%
2	Care for the ecological area and environment	6	60%
3	Educating community on new concepts and skills	4	40%
4	CSR has always been part of our DNA, engrained in our blueprint	3	30%
5	Every company should do their bit	3	30%
6	Made up of many facets	3	30%
7	Still room for improvement	3	30%
8	Positive receptor for guests	2	20%
9	Communities will seek to find other benefits if neglected	2	20%
10	Not asking for or expecting any return on investment	2	20%
11	To get good people with skills	2	20%
12	Results in less poaching	2	20%
13	Job creation	2	20%
14	Attracts authentic characters that want to work for company	2	20%
15	The more we do the more the community will expect	2	20%
16	Exposure and marketing success	2	20%
17	Collaboration of solid relationships with government institutions	2	20%
18	Out the box thinking and innovation needed with limited resources	2	20%
19	Stimulating the economy	2	20%
20	Success of business can fold without community partnership	1	10%
21	Reducing poverty in the community	1	10%
22	Strategic move	1	10%
23	I don't like the term	1	10%
24	Developing businesses	1	10%
25	Making sure all the policies are in place	1	10%
26	The going green initiative	1	10%
		62	

5.1.2   Understanding Creating Shared Value

The ten managers interviewed provided 26 interpretations of the concept of shared value, which were categorised into 12 constructs (see Table 5). The leading interpretations of shared value were enriched, symbiotic relationships between business and community (60%), making wildlife the catalyst for rural development (40%), and caring for land, wildlife, and people (30%). 20% of managers also mentioned reduced poaching, tangible community benefits, shareholder support, and community cooperation.

Although still a relatively new concept, senior management had a relatively accurate if broad understanding of what CSV entails. There was a clear belief that both parties needed to collaborate in order to achieve the best results, not always equally. The importance of wildlife

in community development was interesting because if wildlife was seen as integral to community development, then residents would take more responsibility of and care for protected areas.

Table 5: What is your understanding of Creating Shared Value?

#	Construct	Frequency n = 10	Percentage
1	A symbiotic relationship, both parties are enriched, pulling equally for same objective	6	60%
2	Make wildlife the catalyst to develop communities, care for protected areas	4	40%
3	Care of the land, care of the wildlife, care of the people	3	30%
4	A reduction in poaching	2	20%
5	Making tangible changes and benefits in communities	2	20%
6	Generating cash/resources to allow shareholders/company to grow at same pace	2	20%
7	Community will protect you if you are continuously helping them	2	20%
8	Link first world international travellers with communities	1	10%
9	Intrinsically we do this well but we are poor at documenting and capturing this data	1	10%
10	A joint decision but who does it first	1	10%
11	Mission statements are irrelevant if the results don't match	1	10%
12	A fine line between government responsibility and our responsibility	1	10%
		26	

5.1.3   Identifying the benefits

The responses for the next two questions were grouped together because their wording may have been ambiguous and they were essentially asking the same question. These questions were targeting the same answer.

The interviews produced 63 perceived benefits, which were grouped into 20 different constructs (see Table 6); these perceived benefits are critical in the context of the whole study. 90% of the respondents mentioned that facilities to enable education and schooling had been a focus. 60% of the respondents spoke about direct employment, and 60% mentioned facilities to enable healthcare. 60% of the respondents highlighted the importance of working 'with' the community instead of 'for' them. 50% discussed raising the profile of wildlife through conservation, the collaboration between community, government, and funding and also the further education Community Development Education Fund (CLEF) bursaries that are offered to young aspiring candidates. Not quite as agreed upon yet still important, 40% of the respondents mentioned the importance of making a difference to as many people as possible and the role for small business development for communities to start creating more employment of their own. Another benefit from only one respondent (10%) was the

significance of creating a safe/controlled environment for guests to gain access to visit the communities and to participate in upliftment programmes.

A important note to make is that three of the highest ranked constructs were service-type benefits, while the majority of the remaining top percentile responses were empowering-type benefits. A common theme spilled over from the answers to CSV, which emphasised the need to allow communities to take charge of their own destiny.

Table 6: *What value do you think andBeyond/Africa Foundation are creating within Welverdiend and Hluvukani? What are the main positive social impacts (financial and non-financial benefits) that have resulted from this relationship?*

#	Construct	Frequency n = 10	Percentage
1	Facilities to enable education	9	90%
2	Facilities to enable healthcare	6	60%
3	Employment	6	60%
4	Work with the community instead of for them, take charge of their own destiny	6	60%
5	Conservation, raising the profile of wildlife	5	50%
6	Collaboration between community, government and funding	5	50%
7	Further education in CLEF (Community Leaders Education Fund) bursaries	5	50%
8	Solid, sustainable projects that make a difference to as many people as possible	4	40%
9	Small business development to create their own jobs	4	40%
10	Facilities to enable sanitation (boreholes, enviro-loos and hippo rollers)	2	20%
11	Skills transfer, star in training programmes	2	20%
12	Facilitates corporate responsibility	1	10%
13	Facilitates purpose for staff and guests	1	10%
14	Deciding factor to chose a responsible tourism company	1	10%
15	Good for marketing/acknowledgement	1	10%
16	Gain guest access to visit community and participate in a controlled environment	1	10%
17	Human dignity and gender equality	1	10%
18	Having a direct relationship with tribal authorities	1	10%
19	Indirect employment	1	10%
20	Transfer financial donations into infrastructure	1	10%
		63	

5.1.4   *Identifying financial and non-financial costs*

Ten interviews generated 55 different responses, which were categorised into 22 constructs (see Table 7). 60% identified company vehicles as a cost. 50% mentioned fuel, company time, and hosting of Africa Foundation staff and guests at lodges. 40% spoke of the daily lodge component costs and time as another element. 30% mentioned the cash contribution from andBeyond to the Africa Foundation, while others identified marketing (30%) and salaries (30%) as direct costs.

It is abundantly clear that most of these costs are financial in nature. Although non-financial costs are extremely difficult to quantify, they are an aspect that should not be overlooked. The higher the research progressed up the corporate ladder, the more the employees were aware of the exact figure that andBeyond currently contributes to the Africa Foundation, which is currently USD $1 million each year to cover their administration fees. Half of this is distributed in hard cash, while the other half comes in the form of support from andBeyond.

Table 7: Are there any costs (financial and non-financial) that have resulted from the relationship between andBeyond Ngala/Africa Foundation and Welverdiend and Hluvukani?

#	Construct	Frequency n = 10	Percentage
1	Company vehicles	6	60%
2	Fuel	5	50%
3	Company time and belief to participate in communities	5	50%
4	Hosting of Africa Foundation staff and guests at lodges	5	50%
5	Daily lodge component costs and time	4	40%
6	A direct cost of $1 million dollars a year, to cover admin fees of Africa Foundation	3	30%
7	Marketing	3	30%
8	Salaries	3	30%
9	Human Resources	2	20%
10	Computers and IT support	2	20%
11	Training	2	20%
12	Cell phones	2	20%
13	Administration	2	20%
14	Office space	2	20%
15	Should be doing more, even if lodges are busy	2	20%
16	Stress involved dealing with communities and chief tribal authorities	2	20%
18	Data	1	10%
19	Materials	1	10%
20	Insurance	1	10%
21	Strategic development	1	10%
22	Land cost rentals - very high	1	10%
		55	

5.1.5   Do the benefits gained from this relationship outweigh the costs involved?

From ten interviews, 31 responses were captured, which were categorised into 13 separate constructs (see Table 8). 90% of the respondents agreed that the benefits definitely outweighed the costs, while one individual (10%) thought they were balanced. When prompted for a reason for their answer, 40% felt the protection of environment was key, with an ideal success on decreasing rhino poaching statistics in the area. 20% of the participants established that the communities were getting more than just government intervention. No respondents felt that the costs outweighed the benefits.

Table 8: Would you say that the benefits outweigh the costs?

#	Construct	Frequency n = 10	Percentage
1	Yes	9	90%
2	Protection of the earth (wildlife with a key focus on decreased rhino poaching)	4	40%
2	3 core principles - care of the land, care of the wildlife, care of the people	3	30%
3	Community getting more than just government intervention	2	20%
4	A catalyst between lodges and communities	2	20%
5	Calmness in the communities, a controlled environment for our guests	2	20%
6	Taken about 25 years to find a happy medium, nothing short-term	2	20%
7	A balance	1	10%
8	Unable to put a value on it, difficult to quantify	1	10%
9	Access to tribal leadership	1	10%
10	Keep sharing the incredible story	1	10%
11	Administration costs are very low	1	10%
12	It now costs nothing for people to realize their dreams	1	10%
13	Constantly ebbs and flows	1	10%
		31	

5.1.6   Suggestions to improve the relationship

Ten interviews generated 27 suggestions to improve the relationship between the protected area and the local communities. These were grouped into 14 constructs (see Table 9). A trend (70%) was that more integration and communication is needed between staff, management, and the respective communities.

Some other ideas had some traction, such as:

- More tools for trade (e.g. company vehicles and computers) would assist the Africa Foundation representatives to complete their duties more effectively (30%).
- More sharing of success stories with the communities and from a marketing point of view (20%).
- Encouraging more guests to visit the communities (20%).
- More Africa Foundation personnel on the ground (20%).
- Faster and full-time project execution (20%).
- Allowing communities to become more involved in decision-making (20%).

Most participants in the interviews had a similar idea on how to strengthen the relationship between andBeyond Ngala/Africa Foundation and the local communities. In the researcher's view, this should be seen positively because it is an area that can be addressed and improved going forward, specifically within this region.

The rest of the creative ideas in response to this question below did not generate as much support as others; despite this, they should not be discredited altogether. Anything new and different can lead to greater innovation and strengthen the relationship going forward.

Table 9:   Do you have any suggestions on how to improve the relationship between andBeyond Ngala/Africa Foundation and Welverdiend or Hluvukani?

#	Construct	Frequency n = 10	Percentage
1	More communication between staff, management and communities/tribal authorities	7	70%
2	Africa Foundation field staff need more tools for trade (e.g. vehicles, laptops etc.)	3	30%
3	Sharing of success stories	2	20%
4	More guests need to visit the communities	2	20%
5	Faster and full time project execution	2	20%
6	More personnel on the ground	2	20%
7	Allow communities to be more involved in decision making	2	20%
8	Building own businesses to create their own jobs	1	10%
9	More on protection of wildlife and conservation areas	1	10%
10	Need to keep improving to retain our competitive advantage	1	10%
11	Manage perceptions/expectations of community	1	10%
12	Improve the quality of housing	1	10%
13	To work more closely with municipalities and government	1	10%
14	Measure perceived success/benefits versus actual success/benefits - measuring impact	1	10%
		27	

5.1.7   *Extent of community access to information and decision-making*

Only nine respondents answered the next question and therefore percentages are not round numbers as seen in previous questions. One individual felt he/she was not in a position to provide an answer.

Nine interviews produced a total of 18 responses, which were grouped into seven constructs (see Table 10). 67% of the participants felt that the community does not influence the way that andBeyond runs their business. 33% admitted that andBeyond should share more information with their local communities. On the contrary, 44% of the sample felt that the community are very involved in decision-making.

The results produced one of the most intriguing findings from the management interviews. Within the Africa Foundation, a consultation process (what, when, why, how) gives the community an opportunity to identify their needs and assist in carrying out their own projects accordingly.

Table 10: To what extent do communities have access to relevant information and influence the decision-making within andBeyond Ngala/Africa Foundation?

#	Construct	Frequency n = 9	Percentage
1	Communities don't influence the way andBeyond run business, limited access to info	6	67%
2	Hugely within the Africa Foundation via a consultation process (what, when, why, how)	4	44%
3	Could and should share more information with communities	3	33%
4	Allow local, indigenous people to participate in Ngala management meetings	2	22%
5	To avoid conflict	1	11%
6	Can't mix community and business imperatives	1	11%
7	Communities need to understand we have finite resources and can only do so much	1	11%
		18	

5.1.8   Utilisation of the shared value measurement

18 responses came out of the ten interviews and were then grouped into seven constructs (see Table 11). The majority (80%) of respondents felt that there is not currently an adequate framework or measurement tool in place to quantify shared value. The remaining 20% felt that there is currently a measurement in place. Of those that answered "no", 30% of respondents described that it is something that the company has already identified and needs to address, while 20% highlighted that more tangible methods are needed. Of those that answered "yes", 10% suggested that the standing infrastructure is a visible sign of some of the work that has been completed in the communities. Another 10% said that the success and value of these projects are currently being assessed through Key Performance Indicators (KPIs) as performance criteria.

All of these constructs are good ideas in theory, but can become extremely difficult to quantify and measure in the long run.

Table 11: Does andBeyond/Africa Foundation have a measurement for shared value?

#	Construct	Frequency n = 10	Percentage
1	No	8	80%
2	An aspect that we have identified the need for	3	30%
3	Yes	2	20%
4	Need more tangible methods	2	20%
5	Insanely difficult to quantify and measure	1	10%
6	We can tell buy looking at all the infrastructure that wasn't there prior to andBeyond	1	10%
7	We use performance criteria - KPI's against project	1	10%
		18	

5.1.9   *Future insights into shared value*

Ten interviews elicited 23 theories on the future of the shared value initiative, which were then categorised into 15 constructs (see Table 12). Only two constructs got support from other respondents. 40% of respondents felt that all game reserves should operate in a similar way to empower local communities, and 30% proposed that andBeyond should allow the local communities to become more involved in their decision-making processes.

Most individuals had contrasting ideas about the future of this shared value initiative. This can be seen by the 15 varied constructs that were identified. These ideas are refreshing and innovative, and none should be ignored.

Table 12: How do you see the future of this shared value initiative?

#	Construct	Frequency n = 10	Percentage
1	An essential part of how all game reserves must operate in developing countries	4	40%
2	Getting community more involved in the decision making within andBeyond	3	30%
3	More business opportunities and skills development	2	20%
4	Must retain the brilliant staff working in the Africa Foundation	2	20%
5	Developing tools to measure and evaluate continuous progress	2	20%
6	When to stop supporting one community and to move onto another	1	10%
7	Continuous innovative thinking	1	10%
8	Consistency of doing the basics right	1	10%
9	More guests = better value, dependant on the economy	1	10%
10	Keep sharing the success story	1	10%
11	Both parties to continue to derive immense benefit	1	10%
12	Need to attract commercial investors	1	10%
13	Share more information with local communities	1	10%
14	Develop an economic nutrient label (shared benefit) for each lodge	1	10%
15	A direct economic impact of 50% coming from within 50km of the lodge	1	10%
		23	

5.2   GUEST INTERVIEWS

This section analyses the open-ended questions from interviews with guests of andBeyond Ngala Private Game Reserve. Guest interviews were conducted purely to get more insight into an objective view on the relationship between andBeyond Ngala and the local communities. The data analysis and results will be reported and described slightly differently in this section. For business reasons, the sample was small (n = 10), the interviews were short and direct, and the responses more suited to qualitative than quantitative analysis.

Prior to their arrival at the lodge, very few guests (10%) had heard about the work that andBeyond are doing within the local communities. This is despite information being on the company website and within their booking confirmation packs. Since many guests book through independent travel agency consultants, this information may not always reach the guest. Guests also admitted that they did not read through all the information that had been given to them prior to arrival. Of the guests that were interviewed during their stay, only 50% of them had learnt of the work that andBeyond were doing within the local communities. Furthermore, their understanding of the Africa Foundation and the project work that they were currently doing was limited and vague. The majority of these guests had learnt about the relationship through a conversation, which was started by their ranger, and not through the information that is found inside their rooms. None of the interviewed guests had gone on a community trip.

None of the guests stated that andBeyond's community development work was the major reason that they decided to travel with andBeyond. 80% of respondents agreed that it may have a certain retention factor for repeat travel guests and that this is valuable information to be shared with people travelling to andBeyond lodges. Most guests were interested in the relationship and extremely complimentary of the happy employees at andBeyond Ngala. One participant (10%) commented on the pride that the staff showed in their work and even indicated that this must be as a direct result of the strong relationship that exists between the lodge and the community.

5.3   COMMUNITY RESIDENT INTERVIEWS

This section analyses the open-ended questions (in Section 5.3.1) followed by categorized questions (in Section 5.3.2) from interviews with employees of andBeyond living in Welverdiend and non-andBeyond employee community members in Welverdiend. The same will then be repeated for Hluvukani in Section 5.3.3 and 5.3.4. The following responses came from employees and non-employees of andBeyond Ngala currently living in either community. Within Interview Guidelines 3 and 4, five open-ended questions preceded the twenty 5-point Likert rating scale categorised questions. This was to ensure that legitimate, original responses were targeted and captured before respondents were asked to select attitudes and feelings towards specific pre-determined categories. The results in this section will be reported and described accordingly. Every time the word 'employee' is used in the text below it refers to the current employees working at andBeyond Ngala *and* living in the selected communities.

During the interview process, the researcher mistakenly interviewed an individual from the Delani community. From Figure 3 it can be seen that this is not a community in which andBeyond and the Africa Foundation have done any work. The results from this one interview were in direct contrast to the results that were presented in the study. The most interesting aspect of this interview was that this individual saw absolutely no value in wildlife because his/her community were receiving no benefit from any of the reserves in their area. In hindsight, it would have been extremely valuable to explore a counterfactual analysis further; this is perhaps something a future study could address.

5.3.1   *Welverdiend community (open-ended questions)*

<u>Strength of the relationship between andBeyond Ngala and Welverdiend</u>

From Table 13, it can be seen that 100% of the employees who were interviewed felt that the relationship between and andBeyond Ngala and their community was good. They cited help with education and the building of schools (50%), employment (33%), and crèches (33%) as the main reasons for their answer. 91% of non-employees of andBeyond Ngala who are currently living in Welverdiend praised the relationship, with a mere 9% feeling that andBeyond Ngala had done nothing for their community. These results exceeded expectations. 48% of the non-employees that praised the relationship said it was because andBeyond Ngala had helped with boreholes to provide water to their residents, while 39% mentioned the assistance with education facilities as the reason and 30% spoke of crèches. It was noted that only 4% of these respondents mentioned employment as a benefit that andBeyond Ngala was bringing to their community, compared to the 33% of employees who identified this construct.

Individual qualitative responses are included to give these results some substance. A teacher stated that "it is a good working relationship up to now. They help with education, health, and welfare". A student said that "Ngala are great because they help to address the challenges of unemployment and illiteracy". A resident from the home-based care centre said that "we don't have to walk 25 km to get water anymore". The same individual said that "we like Ngala because they give money if wild animals are attacking our stock". The researcher is not aware of andBeyond Ngala or the KNP being involved in providing such compensation to locals.

Table 13:   What do you think of the relationship between andBeyond Ngala and Welverdiend? Why?

#	Construct	Frequency		
		Employees	Non-employees	Total
		n = 6	n = 23	n = 29
1	Good relationship	6	21	**27**
2	Helped build schools and with education	3	9	**12**
3	Providing water	0	11	**11**
4	Creches	2	7	**9**
5	Toilets	0	6	**6**
6	They helped with infrastructure	0	5	**5**
7	Home based care center	0	5	**5**
8	Bursaries	1	4	**5**
9	Clinic	1	3	**4**
10	Kitchens	0	3	**3**
11	Employment	2	1	**3**
12	They do nothing for us	0	2	**2**
13	Craft center	0	1	**1**
14	Submissable water pumps	0	1	**1**
15	Compensation for animals attacking our stock	0	1	**1**
16	Hippo rollers	1	1	**1**
17	Less crime	1	0	**1**

In Graph 1, the reasons and frequencies are shown as to why the residents of Welverdiend believe the relationship with andBeyond Ngala is a good one. These are the benefits that are being realised by the community. Schooling/education, water, crèches, toilets, infrastructure, the home-based care centre and bursaries were among the highest ranked constructs identified from the above open-ended question. Surprisingly, non-employees of andBeyond mentioned water, toilets, infrastructure and the home-based care centre; these benefits were not identified by the employees of andBeyond living in the same community.

69

Graph 1: Why is the relationship with andBeyond Ngala good?
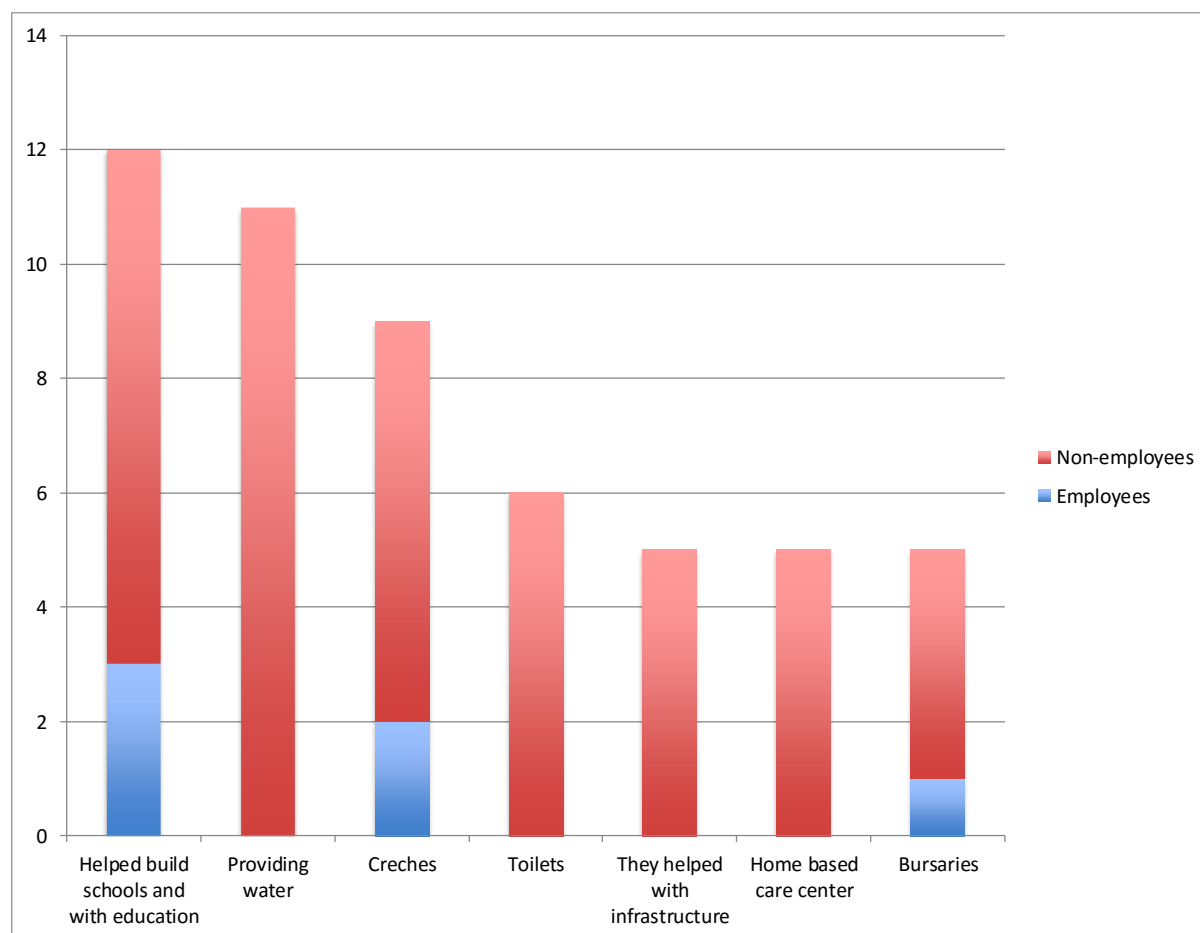
Is your life better in Welverdiend because of andBeyond Ngala?

As shown in Table 14, 100% of the employee respondents stated that their lives were better in Welverdiend because of andBeyond Ngala. Almost in parallel with these results, 91% of non-employee residents expressed gratitude towards the fact that their life in Welverdiend was better because of andBeyond Ngala. These results mirrored the responses in Table 13.

Table 14: Do you think your life in Welverdiend is better because of andBeyond Ngala?

#	Construct	Frequency		
		Employees	**Non-employees**	**Total**
		n = 6	**n = 23**	**n = 29**
1	Yes	6	21	**27**
2	No	0	2	**2**

Identifying the best thing that andBeyond Ngala does for Welverdiend

Table 15 highlights what residents of Welverdiend believe the best thing is that andBeyond Ngala does for their community. 50% of employees mentioned the assistance with school facilities, while 33% spoke of bursaries and crèches. Similar to the employee answers, non-employee respondents emphasised the building of schools and helping with education (35%). Providing bursaries (17%) and providing water (17%) were also raised.

The researcher noted that only one respondent from the youth centre answered: "to protect the environment". Whether this is as a direct result of the work that andBeyond Ngala/Africa Foundation have done within Welverdiend, we will never know. Another resident quite profoundly answered: "they help bring development to society". Both of these comments came from non-employees.

Table 15: What is the best thing that andBeyond Ngala does for Welverdiend?

| # | Construct | Frequency | | |
| | | Employees | Non-employees | Total |
		n = 6	n = 23	n = 29
1	Building schools and helping with education	3	8	**11**
2	Bursaries	2	4	**6**
3	Providing water	0	4	**4**
4	Home based care center	0	3	**3**
5	Creches	2	1	**3**
6	Clinics	1	2	**3**
7	They haven't done anything	0	2	**2**
8	Hippo rollers	0	2	**2**
9	Bringing development to society	0	2	**2**
10	To protect the environment	0	1	**1**
11	The whole community has benefited	0	1	**1**
12	Toilets	0	1	**1**
13	Vegetable garden	0	1	**1**
14	Craft center because it is a source of income	0	1	**1**
15	Guests visiting the communites	1	0	**1**

Most of the benefits highlighted in Graph 1 were echoed below in Graph 2, although in the previous response, no one mentioned the assistance that residents had received by means of a healthcare facility (e.g. a clinic).

71

Graph 2: What is the best thing andBeyond Ngala does for Welverdiend?
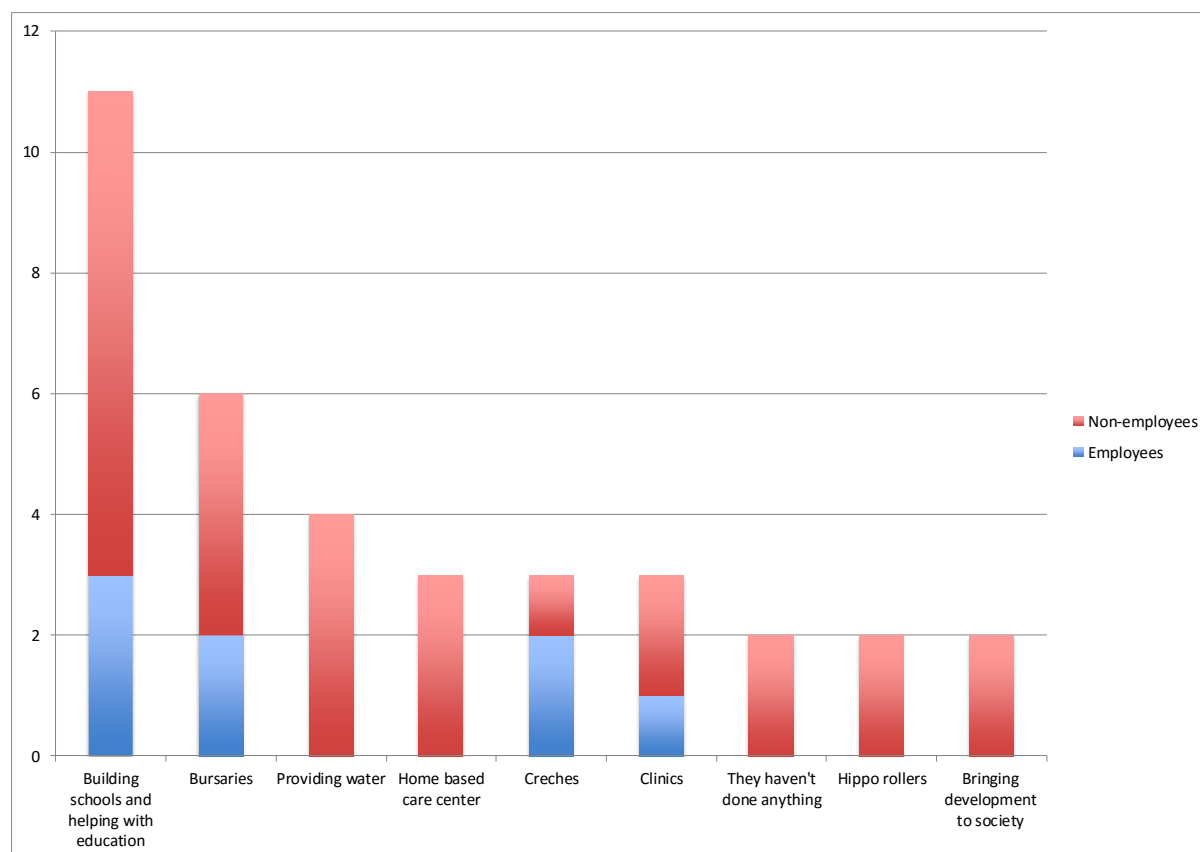
Assessing potential problems between andBeyond Ngala and Welverdiend

Table 16 addresses the relationship between andBeyond Ngala and Welverdiend. 83% of employees reported that they did not think that there were any problems with the relationship, while the remaining 17% felt that there were problems that may need to be addressed. 87% of non-employees felt that there were no problems, with only 9% indicating that they thought problems exist. The remaining 4% did not even know a relationship existed.

This question brought out some intriguing qualitative responses from the residents of Welverdiend who decided to elaborate on their answer. An administrator said that "the only problem is with the perception of people in the community. They have a miss-understanding". A teacher said that "the problem is not with Ngala, it is with the government". An intern answered: "people's expectations of these lodges is a lot higher than they should be. They are not multi-million places". A student who answered yes to this question elaborated further by saying: "all Ngala's help depends on guest funding. This is bad. If there are no more guests, there will be no further projects".

Table 16: Are there any problems with the relationship between andBeyond Ngala and Welverdiend?

| # | Construct | Frequency | | |
| | | Employees | Non-employees | Total |
		n = 6	n = 23	n = 29
1	No	5	20	**25**
2	Yes	1	2	**3**
3	What relationship	0	1	**1**

Ideas for improving the relationship between andBeyond Ngala and Welverdiend

When asked about providing ideas for how andBeyond Ngala could work better for Welverdiend (Table 17), 33% of employees expressed their happiness with the relationship and felt that no changes were necessary. Another 33% of the employees indicated that andBeyond do a great job by listening to the needs of the residents of Welverdiend, but that they are taking too long to roll out projects and address those needs or challenges. Non-employee residents did not identify any constructs with high frequency, suggesting a lack of consensus among the individuals that were interviewed. 22% of non-employee respondents had no further ideas on how to strengthen the relationship, but 17% suggested that more communication and more direct interaction with andBeyond Ngala could help going forwards.

A professional nurse said: "I have no advice. They the best. Take them away and we will be nowhere without them". A teacher identified "more training of local guides" as an issue that needs to be addressed. A chef recognised that "more tourists from Ngala must visit our community". All these recommendations are also represented in Graph 6, which are given later in this chapter.

Table 17: Do you have any ideas about how andBeyond Ngala can work better for Welverdiend?

#	Construct	Frequency		
		Employees	Non-employees	Total
		n = 6	n = 23	n = 29
1	No further ideas	0	5	**5**
2	More communication and interaction with andBeyond	0	4	**4**
3	More water access via boreholes	1	3	**4**
4	Sports/recreation facilities	0	3	**3**
5	Community hall	0	2	**2**
6	More classrooms	0	2	**2**
7	Don't change anything. We very happy	2	0	**2**
8	They listen to our needs but action is too slow	2	0	**2**
9	Create more jobs	0	2	**2**
10	More bursaries	1	1	**2**
11	More skills transfer	0	1	**1**
12	Créches	0	1	**1**
13	Help the poor	0	1	**1**
14	Go from house to house and help	0	1	**1**
15	Toilets	0	1	**1**
16	More training of local rangers/guides	0	1	**1**
17	More donations	0	1	**1**
18	A clinic on our side of the community. The other is far	0	1	**1**
19	Help with fencing	0	1	**1**
20	More guests visiting the community	0	1	**1**
21	Source local talent before looking elsewhere	1	0	**1**
22	Help more people	1	0	**1**

5.3.2 *Welverdiend community (categorised questions)*

We turn now to the twenty categorised questions. These are presented in Table 18 and 19. Only the most pertinent responses or outliers will be mentioned in the reporting and description of the results, because these will add to the discussion and interpretation at a later stage. The questions in Table 18 (responses from andBeyond Ngala employees living in Welverdiend) will be replicated in Table 19 for the non-employees living in Welverdiend. Questions have been ranked according to the most satisfied responses. In the tables that follow in this section, the modal category (the most selected response) is shown as bold font and shaded in grey to simplify the analysis and draw attention to the figure.

According to Table 18, the andBeyond employees residing in Welverdiend have a strong appreciation of the importance of wildlife and feel that tourism should be encouraged because it provides many benefits. All employees interviewed were "very happy" with what andBeyond Ngala/Africa Foundation had done for schooling and education in their community. They also all knew of at least one person who had benefited from the CLEF bursary programme. Half the staff felt that andBeyond Ngala involved them in the decision-making process with regard to community projects, while the other half did not. For the most part, these employees were relatively satisfied with the number of projects within their community. Most agreed that the poaching of animals was worse now than what it had been beforehand. Interestingly, employees were not satisfied with the number of jobs at andBeyond Ngala; it would appear that they expect more employment opportunities. This is displayed more clearly in Graph 3. Few respondents had an opinion on whether or not the government do more in their community than they used to do, but those that did answer tended to say that they did not. Lastly, all the staff interviewed in this quota were proud to work for andBeyond at Ngala.

Table 18: Responses from employees andBeyond Ngala living in Welverdiend

Statement (positive)	😊😊	😊	😐	☹	☹☹	Statement (negative)
Wildlife is important to us	6	0	0	0	0	Wildlife is very problematic to us
Ngala have helped build good education facilities	6	0	0	0	0	Ngala haven't built any education facilities
We think tourism has many benefits and should be encouraged	6	0	0	0	0	We don't think tourism has many benefits and should not be encouraged
I am proud to work at Ngala	6	0	0	0	0	I am not proud to work at Ngala
Ngala does a lot for us	5	1	0	0	0	Ngala does nothing for us
Our relationship with Ngala is excellent	5	1	0	0	0	Our relationship with Ngala is very bad
I know of somebody who has received a study bursary from Ngala	5	1	0	0	0	I don't know of anybody who has received a study bursary from Ngala
Community leaders are honest and work hard for us	5	0	0	0	1	Community leaders are dishonest and don't work hard for us
Money raised for the community is spent in the best possible way	4	1	1	0	0	Money raised for the community is wasted or stolen
Businesses in our community employ a lot of people	4	0	0	0	2	Businesses in our community don't employ a lot of people
Ngala work carefully with our community to help us	4	0	0	2	0	Ngala don't work carefully with our community
Many people in our community have benefited because of Ngala	4	1	0	1	0	Very few people in our community have benefited because of Ngala
The healthcare in our community has improved because of Ngala	4	0	1	0	1	The healthcare in our community has not improved because of Ngala
Ngala staff need to spend more time interacting with the community	4	1	0	0	1	Ngala staff don't need to spend more time interacting with the community
Ngala listen to our needs	3	1	1	0	1	Ngala don't listen to us
Ngala involve us in making decisions on community projects	3	0	0	0	3	Ngala don't involve us in making decisions on community projects
People poach less than before	2	1	0	0	3	People poach more than before
We are highly satisfied with the number of Ngala projects	2	2	0	1	1	We are very dissatisfied with the lack of Ngala projects
Employment by Ngala is what we expected	1	2	0	1	2	Employment by Ngala is less than we expected
The government do more in our community than they used to	1	0	3	0	2	The government do less in our community than they used to

Table 19: Responses from non-employees of andBeyond Ngala living in Welverdiend

Statement	☺☺	☺	😐	☹	☹☹	Statement
We think tourism has many benefits and should be encouraged	23	0	0	0	0	We don't think tourism has many benefits and should not be encouraged
Wildlife is important to us	20	2	0	0	1	Wildlife is very problematic to us
Our relationship with Ngala is excellent	20	1	1	1	0	Our relationship with Ngala is very bad
Ngala staff need to spend more time interacting with the community	20	2	0	1	0	Ngala staff don't need to spend more time interacting with the community
Ngala have helped build good education facilities	18	2	1	1	1	Ngala haven't built any education facilities
Money raised for the community is spent in the best possible way	18	2	3	0	0	Money raised for the community is wasted or stolen
The healthcare in our community has improved because of Ngala	18	2	1	1	1	The healthcare in our community has not improved because of Ngala
Ngala does a lot for us	17	4	1	1	0	Ngala does nothing for us
I know of somebody who has received a study bursary from Ngala	14	1	1	1	6	I don't know of anybody who has received a study bursary from Ngala
Ngala listen to our needs	12	9	2	0	0	Ngala don't listen to us
Ngala work carefully with our community to help us	12	8	2	1	0	Ngala don't work carefully with our community
Ngala involve us in making decisions on community projects	11	8	3	0	1	Ngala don't involve us in making decisions on community projects
We are highly satisfied with the number of Ngala projects	10	7	0	4	2	We are very dissatisfied with the lack of Ngala projects
Many people in our community have benefited because of Ngala	10	6	1	2	4	Very few people in our community have benefited because of Ngala
Community leaders are honest and work hard for us	10	6	4	1	2	Community leaders are dishonest and don't work hard for us
Employment by Ngala is what we expected	9	6	3	2	3	Employment by Ngala is less than we expected
People poach less than before	8	4	1	1	9	People poach more than before
The government do more in our community than they used to	6	4	8	2	3	The government do less in our community than they used to
Businesses in our community employ a lot of people	3	4	4	5	7	Businesses in our community don't employ a lot of people

Graph 3: Welverdiend resident satisfaction with the number of community members employed at andBeyond Ngala
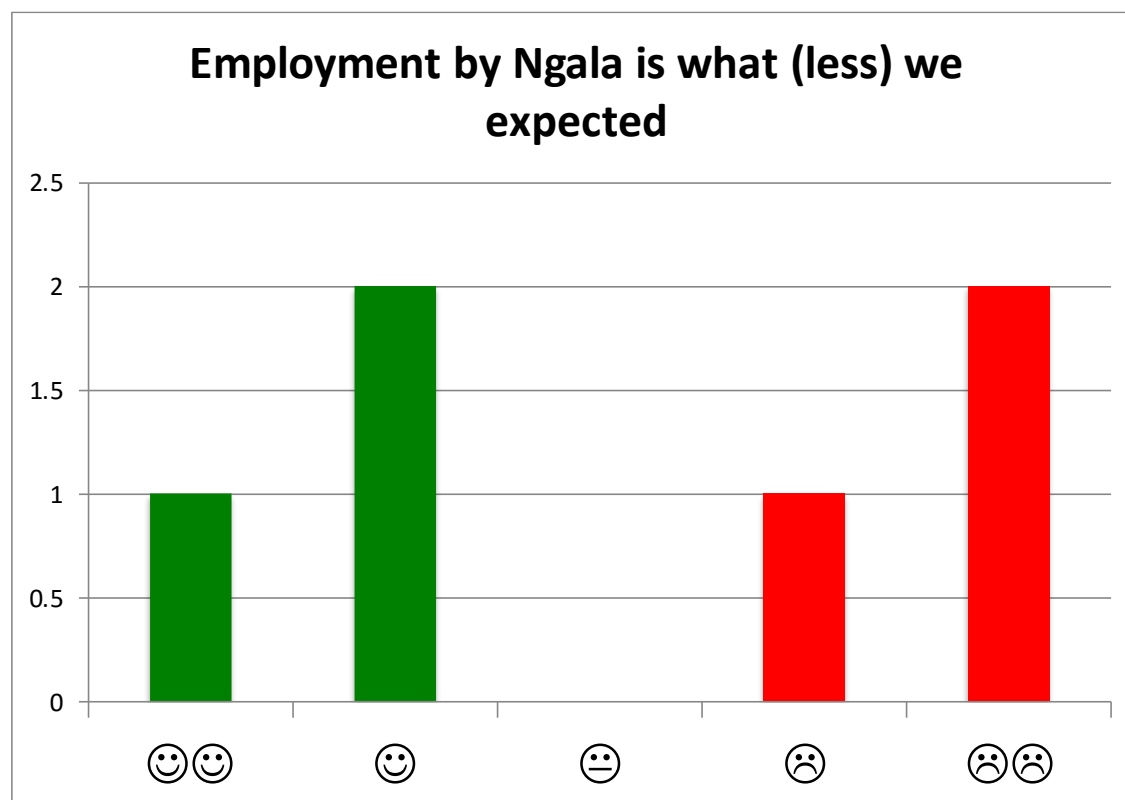
As Table 19 indicates, non-employee residents of Welverdiend understand the importance of wildlife to their community and see the benefit in continuing to encourage tourism. They value their relationship with andBeyond Ngala and believe that andBeyond Ngala has done a lot for their community. Residents believe that andBeyond Ngala staff need to spend more time interacting with their community. Approximately two thirds of these residents know of someone who has received a CLEF study bursary through andBeyond Ngala. About a quarter of respondents felt that andBeyond Ngala could increase the number of projects within Welverdiend, but this is to be expected as people will always want more. With regards to poaching of animals, the results suggest that residents felt it had decreased slightly over the years. Another finding showed that residents of Welverdiend were disappointed with the number of individuals employed by local businesses. This can be seen in Graph 4. In fact, a principle of a school even commented, "what local businesses?"

Graph 4: Welverdiend residents' satisfaction with local businesses
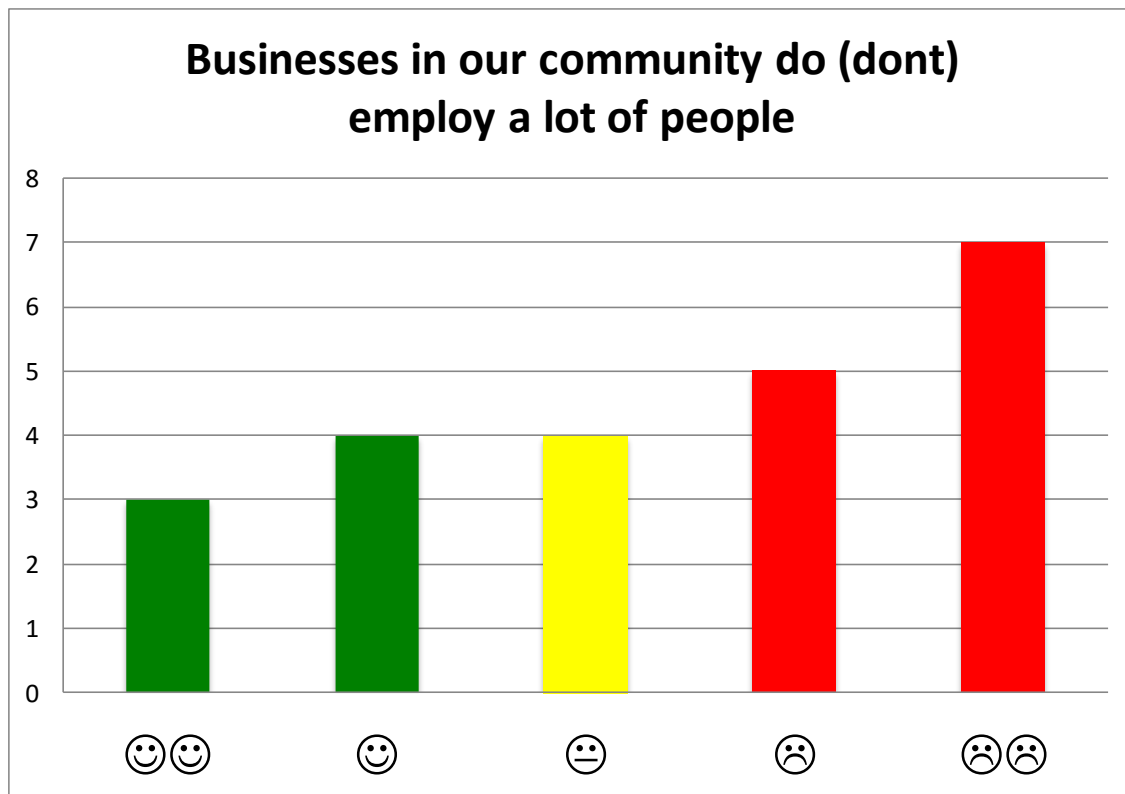
5.3.3   Hluvukani community (open-ended questions)

The researcher also questioned employees and non-employees of the Hluvukani community where andBeyond has a slightly less significant impact. This was shown in Figure 4. As already mentioned, the same structure and descriptions that were adopted above for the Welverdiend community will now be followed for the Hluvukani community. Take note that the sample sizes of employees of andBeyond living in Hluvukani and non-andBeyond employee community members residing in Hluvukani differ to the sample sizes in Welverdiend.

Strength of the relationship between andBeyond Ngala and Hluvukani

Table 20 indicates that 83% employees that reside in Hluvukani felt that the relationship between andBeyond Ngala and their community was strong. This was substantiated by the fact that 58% of these respondents made mention of an improvement in schooling within their community. A slightly lower 60% of non-employees spoke highly of this relationship; however, 33% remarked that andBeyond Ngala have done nothing for them, with some of these individuals even saying they know absolutely nothing about any relationship that exists.

Again, some of the more interesting responses were captured for perusal. The first was one of unhappiness where a respondent said that "staff at Ngala are coming from as far as Justicia". This is a community approximately 44 km from the Orpen gate, as the crow flies. The rest of the responses were very positive. One respondent noted that "andBeyond Ngala have brought lots of projects to the community at large". Another said that "they were the first company to assist in our community". A student even remarked that "Ngala are doing the work in our community that the government are failing to do".

Table 20: What do you think of the relationship between andBeyond Ngala and Hluvukani? Why?

| # | Construct | Frequency | | |
| | | Employees | Non-employees | Total |
		n = 12	n = 15	n = 27
1	Good relationship	10	9	**19**
2	Schools	7	1	**8**
3	Créches	4	2	**6**
4	They have done nothing for us	0	5	**5**
5	They help us	0	4	**4**
6	They create jobs	1	2	**3**
7	Toilets	2	1	**3**
8	Bursaries	2	1	**3**
9	They help provide water	2	0	**2**
10	Alright relationship, could be better	2	0	**2**
11	Clinics	1	0	**1**

Is your life better in Hluvukani because of andBeyond Ngala?

92% of staff felt that their lives were better in Hluvukani directly because of andBeyond Ngala, with one respondent (8%) not feeling the same as the others (Table 21). Despite the 27% of non-employees that said that andBeyond Ngala had done nothing for them, 73% of the sample still thought that their life was better in Hluvukani because of andBeyond Ngala.

Table 21: Do you think your life in Hluvukani is better because of andBeyond Ngala?

#	Construct	Frequency		
		Employees	Non-employees	Total
		n = 12	n = 15	n = 27
1	Yes	11	11	**22**
2	No	1	4	**5**

Identifying the best thing that andBeyond Ngala does for Hluvukani

Two specific constructs dominated the employee responses when considering what the best thing is that andBeyond Ngala had done for Hluvukani in Table 22. Similar to the results displayed in Table 20, 58% noted an improvement in schooling within their community, while 50% thought that bursaries were the best thing that andBeyond Ngala were currently doing for Hluvukani. For the non-employees, the highest ranked construct at 40% was that andBeyond Ngala do nothing for the people in Hluvukani. This is a concern. 20% mentioned that andBeyond Ngala have helped to build things in their community and 20% of respondents said that andBeyond Ngala has helped provide locals with access to water.

As with Welverdiend, one resident identified "nature conservation awareness" as one of the best things that andBeyond Ngala is doing in Hluvukani.

Table 22: What is the best thing that andBeyond Ngala does for Hluvukani?

#	Construct	Frequency		
		Employees	Non-employees	Total
		n = 12	n = 15	n = 27
1	Schools	7	1	**8**
2	Bursaries	6	1	**7**
3	They do nothing	1	6	**7**
4	Providing water	3	3	**6**
5	Creches	3	1	**4**
6	Building things	0	3	**3**
7	Employment	0	2	**2**
8	Toys	0	1	**1**
9	Resources	0	1	**1**
10	Nature conservation awareness	0	1	**1**
11	Toilets	0	1	**1**
12	Uniform	1	0	**1**
13	Hippo rollers	1	0	**1**

Assessing potential problems between andBeyond Ngala and Hluvukani

Table 23 shows that only 8% of employees felt that there was a problem with the relationship between andBeyond Ngala and Hluvukani. A further 8% were uncertain about whether there was a problem or not, while the remainder (83%) of the respondents reported no problems at all. For the non-employees, 53% of respondents did not think there were any problems with the relationship between andBeyond Ngala and their community, 33% did not know a relationship even existed, and only 13% of the sample were unsure of the answer.

Table 23: Are there any problems with the relationship between andBeyond Ngala and Hluvukani?

| # | Construct | Frequency | | |
| | | Employees | Non-employees | Total |
		n = 12	n = 15	n = 27
1	No	10	8	**18**
2	What relationship	1	5	**6**
3	I don't know	1	2	**3**

Ideas for improving the relationship between andBeyond Ngala and Hluvukani

The most interesting thing to come out in the employee responses in Table 24 was that 25% of interviewees felt that the community of Welverdiend was benefiting more than their community, Hluvukani. From the analysis, it was recorded that 17% of employees highlighted the value of having guests visit their community for a cultural experience while on a safari holiday. In wrapping up the open-ended questions from the Hluvukani interviews, 40% of non-employees felt than andBeyond Ngala could create more employment for the people in their community. A further 33% would like to see more classrooms built, while another 33% would also like assistance with boreholes to provide better access to water.

When asked about ideas on how to strengthen the relationship, one resident responded: "The Africa Foundation must just replicate exactly what they have done in Welverdiend and then we will be happy".

Table 24: Do you have any ideas about how andBeyond Ngala can work better for Hluvukani?

#	Construct	Frequency		
		Employees	Non-employees	Total
		n = 12	n = 15	n = 27
1	Create more jobs	1	6	**7**
2	More classrooms/schools	1	5	**6**
3	Boreholes for water	1	5	**6**
4	Replicate all they have done in Welverdiend	3	0	**3**
5	No ideas	3	0	**3**
6	Bring more guests into the community	2	0	**2**
7	Sports facilities	0	2	**2**
8	Kitchens	0	2	**2**
9	Toilets	0	2	**2**
10	More bursaries	1	1	**2**
11	Day care center	0	1	**1**
12	Offices	0	1	**1**
13	Toys for children	0	1	**1**
14	Creches	0	1	**1**
15	Look after orphans	0	1	**1**
16	Invest more in community development projects	0	1	**1**
17	andBeyond need to talk more about the work they do	0	1	**1**
18	Explain how Ngala and Africa Foundation work together	1	0	**1**
19	Employ more Africa Foundation staff	1	0	**1**
20	Provide computers	1	0	**1**
21	Work hand in hand with Indunas	1	0	**1**
22	Open a sewing school	1	0	**1**
23	Help to buy uniforms	1	0	**1**
24	Pay for accommodation and food alongside the bursaries	1	0	**1**
25	Gardens for vegetables	1	0	**1**

5.3.4   *Hluvukani community (categorised questions)*

We turn now to the 20 categorised questions that residents from Hluvukani were asked. These are presented in Table 25 and 26. Only the most pertinent responses or outliers will be mentioned in the reporting and description of the results. Questions have been ranked according to the most satisfied responses. In the tables that follow in this section, the modal category (the most selected response) is shown as bold font and shaded in grey to simplify the analysis and draw attention to the figure.

From Table 25, it is evident that andBeyond Ngala are trying their best to listen to the needs of the people in Hluvukani and to work 'with' the residents instead of 'for' them. This is being

felt within the community as resident are feeling empowered in terms of their decision-making. Most employees that were interviewed know of at least one person who has benefited from the CLEF bursary programme. There was not much consensus amongst the respondents over the number of projects in their community. The same applied to the question around the poaching of animals. Some hinted that the situation had improved, while others said it had gotten worse. The question around government intervention within Hluvukani seemed to confuse a lot of respondents, so half of them were unable to give an answer. All but one staff member was proud to work for andBeyond Ngala; this individual was not asked the reason for their answer.

In bringing an end to the category questions for Hluvukani, it can be seen in Table 26 that non-employees of andBeyond Ngala residing in Hluvukani still overwhelmingly treasure the importance of wildlife. They also wholeheartedly support the notion of encouraging tourism because they see the benefits that it brings into the area. Residents were concerned that poaching of animals was much worse that what it had been. Although 80% of residents felt that their relationship with andBeyond Ngala was excellent, 67% felt dissatisfied with the lack of andBeyond Ngala projects within their community. There was also a strong pattern of unhappiness within the community of Hluvukani with regards to local businesses, or lack thereof, as well as the fact that these businesses do not employ enough people. On the subject of employment, 40% of respondents were unhappy that andBeyond Ngala were employing less people from their community than they would have expected. This was also the only quota sample where there were more respondents who didn't know of anybody who had received a CLEF study bursary through andBeyond Ngala than ones that did. Respondents also seemed angry about the lack of support that their community had received from government in recent times.

Table 25: *Response from employees andBeyond Ngala living in Hluvukani*

Statement (positive)	😊😊	😊	😐	☹	☹☹	Statement (negative)
We think tourism has many benefits and should be encouraged	12	0	0	0	0	We don't think tourism has many benefits and should not be encouraged
Ngala involve us in making decisions on community projects	11	0	1	0	0	Ngala don't involve us in making decisions on community projects
Ngala work carefully with our community to help us	11	1	0	0	0	Ngala don't work carefully with our community
Ngala staff need to spend more time interacting with the community	11	0	0	0	1	Ngala staff don't need to spend more time interacting with the community
I am proud to work at Ngala	11	1	0	0	0	I am not proud to work at Ngala
Ngala does a lot for us	10	2	0	0	0	Ngala does nothing for us
Wildlife is important to us	10	2	0	0	0	Wildlife is very problematic to us
Ngala listen to our needs	10	2	0	0	0	Ngala don't listen to us
Our relationship with Ngala is excellent	9	3	0	0	0	Our relationship with Ngala is very bad
Ngala have helped build good education facilities	8	2	2	0	0	Ngala haven't built any education facilities
I know of somebody who has received a study bursary from Ngala	8	1	0	0	3	I don't know of anybody who has received a study bursary from Ngala
Businesses in our community employ a lot of people	7	3	0	0	2	Businesses in our community don't employ a lot of people
Money raised for the community is spent in the best possible way	6	4	2	0	0	Money raised for the community is wasted or stolen
Many people in our community have benefited because of Ngala	6	5	0	0	1	Very few people in our community have benefited because of Ngala
The healthcare in our community has improved because of Ngala	6	1	3	0	2	The healthcare in our community has not improved because of Ngala
People poach less than before	5	1	1	0	5	People poach more than before
Community leaders are honest and work hard for us	5	3	2	1	1	Community leaders are dishonest and don't work hard for us
Employment by Ngala is what we expected	4	4	0	1	3	Employment by Ngala is less than we expected
We are highly satisfied with the number of Ngala projects	4	2	2	2	2	We are very dissatisfied with the lack of Ngala projects
The government do more in our community than they used to	3	0	6	1	2	The government do less in our community than they used to

Table 26: Responses from non-employees andBeyond Ngala living in Hluvukai

	☺☺	☺	😐	☹	☹☹	
Wildlife is important to us	15	0	0	0	0	Wildlife is very problematic to us
We think tourism has many benefits and should be encouraged	15	0	0	0	0	We don't think tourism has many benefits and should not be encouraged
Ngala staff need to spend more time interacting with the community	15	0	0	0	0	Ngala staff don't need to spend more time interacting with the community
Our relationship with Ngala is excellent	12	0	1	1	1	Our relationship with Ngala is very bad
Ngala work carefully with our community to help us	12	0	0	0	3	Ngala don't work carefully with our community
The healthcare in our community has improved because of Ngala	12	1	0	0	2	The healthcare in our community has not improved because of Ngala
Ngala listen to our needs	11	0	0	0	4	Ngala don't listen to us
Many people in our community have benefited because of Ngala	11	0	0	0	4	Very few people in our community have benefited because of Ngala
Community leaders are honest and work hard for us	11	1	1	0	2	Community leaders are dishonest and don't work hard for us
Ngala involve us in making decisions on community projects	10	1	0	0	4	Ngala don't involve us in making decisions on community projects
Ngala does a lot for us	9	1	0	0	5	Ngala does nothing for us
Ngala have helped build good education facilities	8	2	1	0	4	Ngala haven't built any education facilities
Money raised for the community is spent in the best possible way	8	2	1	0	4	Money raised for the community is wasted or stolen
I know of somebody who has received a study bursary from Ngala	5	2	1	1	6	I don't know of anybody who has received a study bursary from Ngala
Employment by Ngala is what we expected	4	4	1	4	2	Employment by Ngala is less than we expected
The government do more in our community than they used to	4	1	2	3	5	The government do less in our community than they used to
People poach less than before	4	0	2	1	8	People poach more than before
Businesses in our community employ a lot of people	4	3	1	0	7	Businesses in our community don't employ a lot of people
We are highly satisfied with the number of Ngala projects	3	2	0	3	7	We are very dissatisfied with the lack of Ngala projects

Graph 5: Hluvukani resident satisfaction with the number of Ngala projects in their community
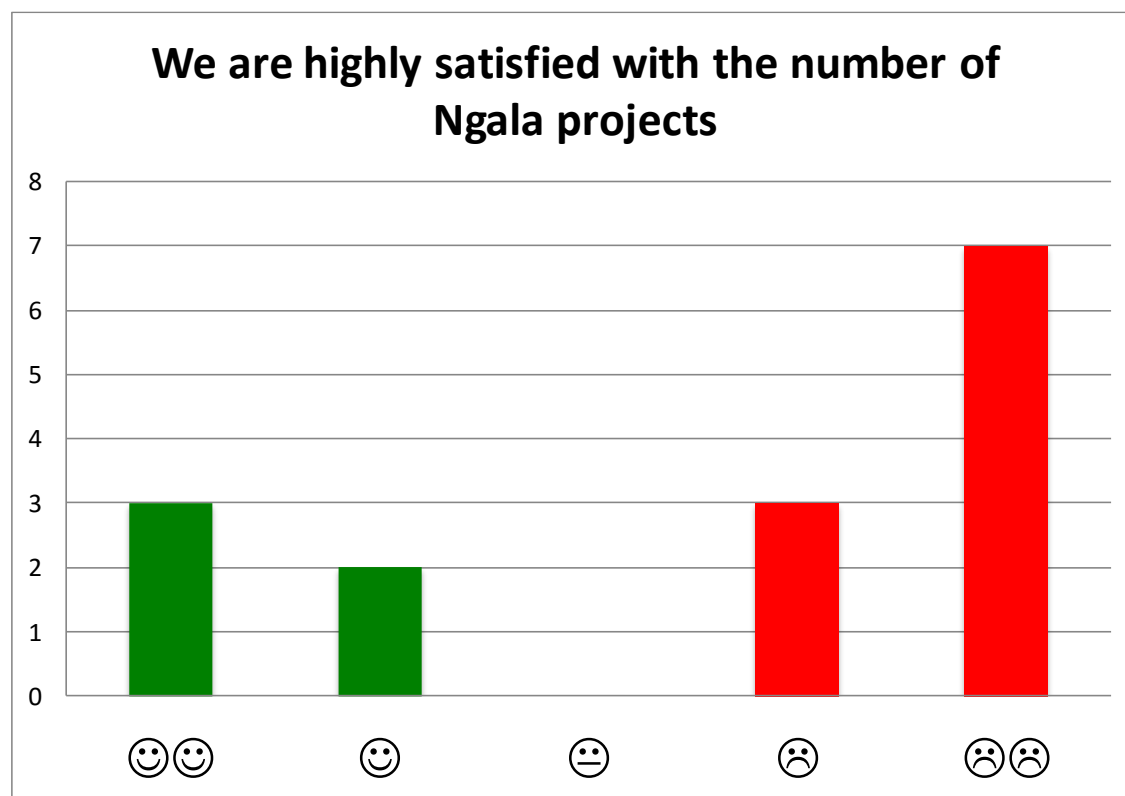
5.4   COMBINING RESULTS FROM BOTH COMMUNITIES

The data in Section 5.3 was presented for each community separately in order to understand all the responses that contributed to reaching the research conclusions. In Section 5.4, this information is collaborated and summarised and presented in Graph 6 to 16 and Table 27 to 31. While the main objective of this research is not necessarily to determine the level of resident satisfaction towards andBeyond Ngala within each community, these findings are naturally included within the responses from many participants.

5.4.1   Is there a match or a mismatch between the perceived value created by the reserve's senior management and the actual value the community understand they receive in the form of benefits?

The top nine benefits (social impacts/value) that management believed they were achieving in the communities were identified and ranked accordingly. Although these were reported earlier in Table 6 and described in Section 5.1.3, they will be represented in Graph 6 below. The percentage figures are calculated using the number of respondents to mention the same construct (n=10). In this case, all constructs identified can be seen as benefits.

88

Graph 6: Benefits identified by senior management
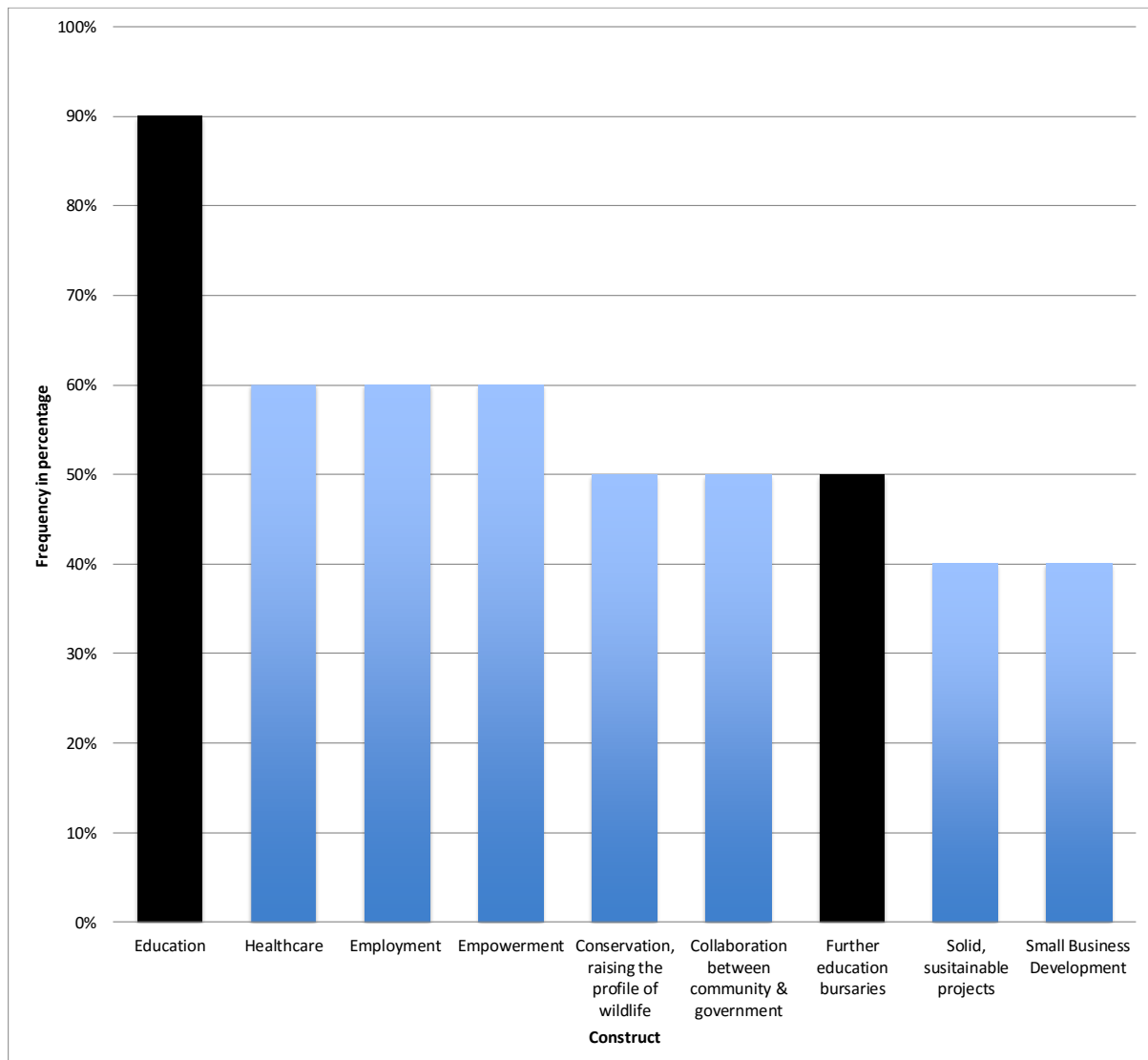
Tables 27 and 28 (see Appendix G and H respectively) highlight the actual value being realised within both Welverdiend and Hluvukani in the form of benefits; these responses were generated from all the open-ended questions. These tables combine all the responses collected from within both communities.

From the results in Tables 27 and 28, the top six actual benefits were identified by communities and represented in Graph 7. Notice how the percentage figures are considerably lower than those identified by management. When comparing Graph 6 and 7, the only two benefits that were identified by both management and the communities were education and bursaries, which are both shaded in black to highlight the match.

89

Graph 7: Benefits identified by both communities
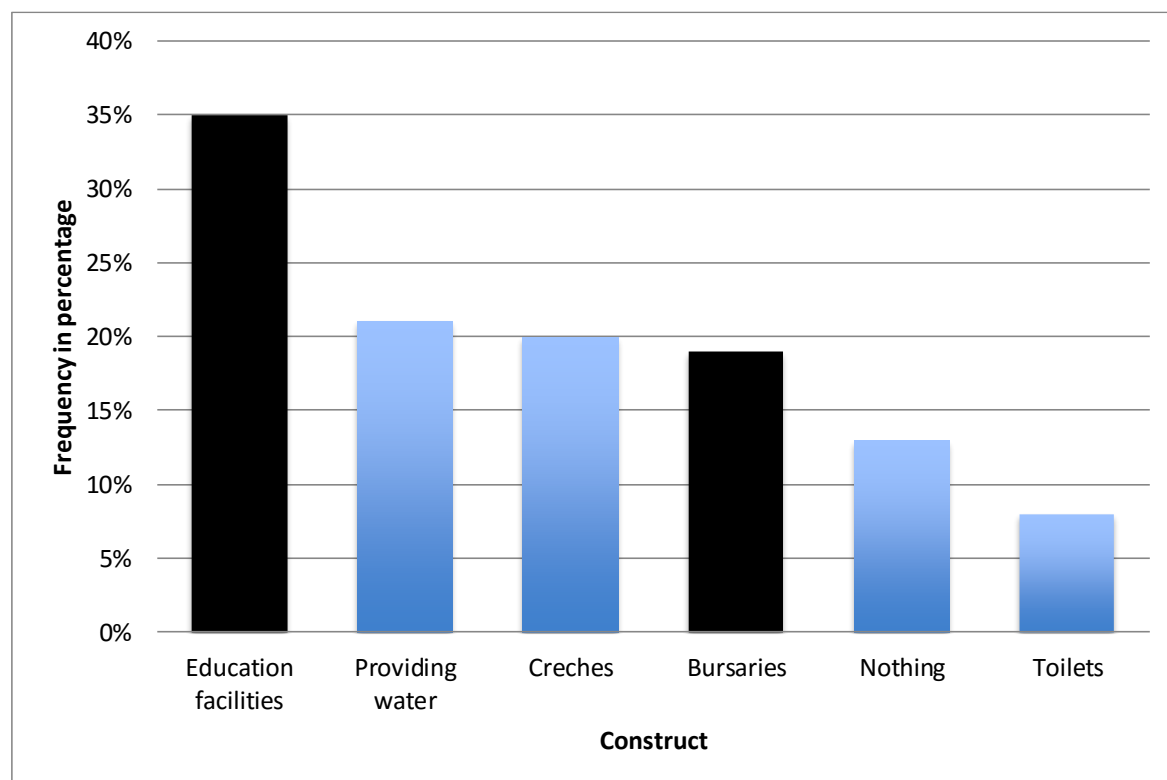
If the perceived benefits identified by management (Graph 6) match the actual benefits being realised in the community (Graph 7), a *complete* match will be the result. A complete match means that the resident identified a construct without being prompted or questioned about the construct by the interviewer.

Should a positive response in Table 29 (above 50% of respondents) agree to or answer favourably to a categorised construct, a *partial* match will be the result. These categorised constructs were tested in the 5-point Likert rating scale questions that were generated from the perceived benefits that were identified by senior management. In other words, these benefits were not initially identified by community residents, but were reacted to when prompted by the interviewer. Table 29 indicates the combined responses from both communities derived from the categorised questions (see Appendix I).

Each of the perceived benefits identified by management in Graph 6 will be listed and described in context below, with reference to Tables 27 to 29.

Assessing the benefit match in education

Both management and the communities had ranked this construct as the most important benefit (n = 56). Graph 8 shows that the residents' attitudes and perceptions towards education facilities were extremely positive.

Graph 8: Satisfaction with education facilities in both communities
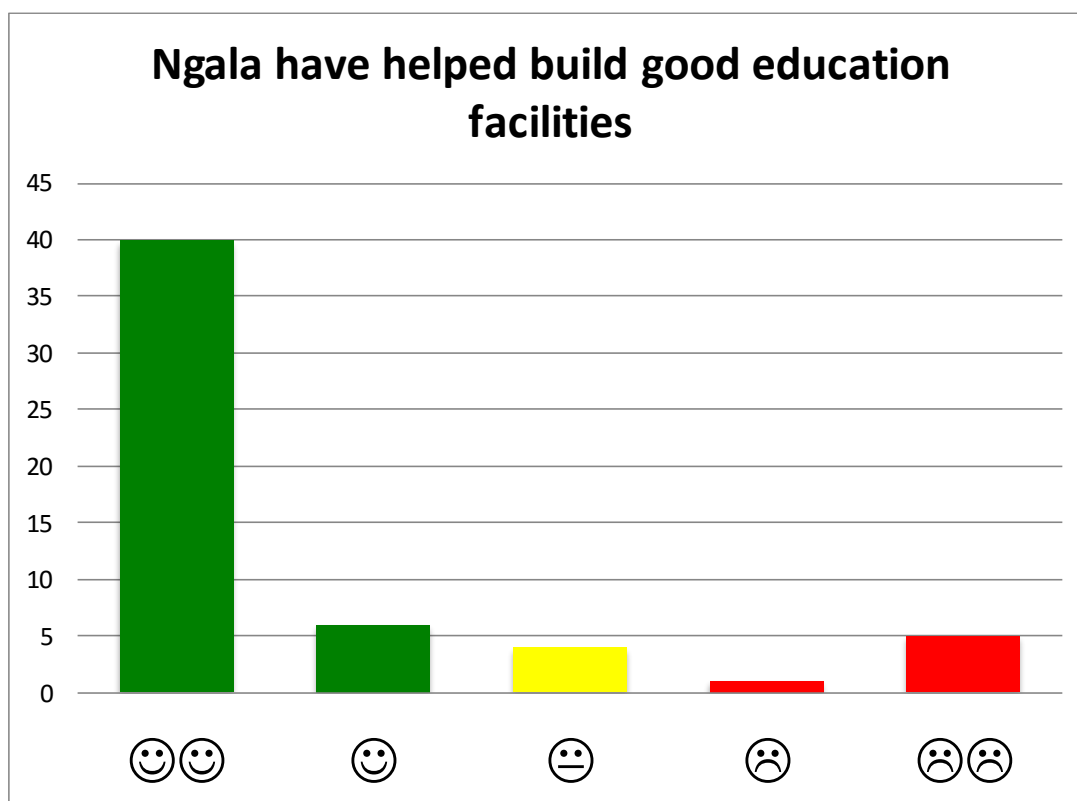
Assessing the benefit match in healthcare

Although residents had not identified healthcare as a major benefit in the open-ended questions, in the categorised questions, Graph 9 showed that the majority (79%) agreed that it had improved as a result of the relationship (n = 56).

Graph 9: Improvement in healthcare in both communities
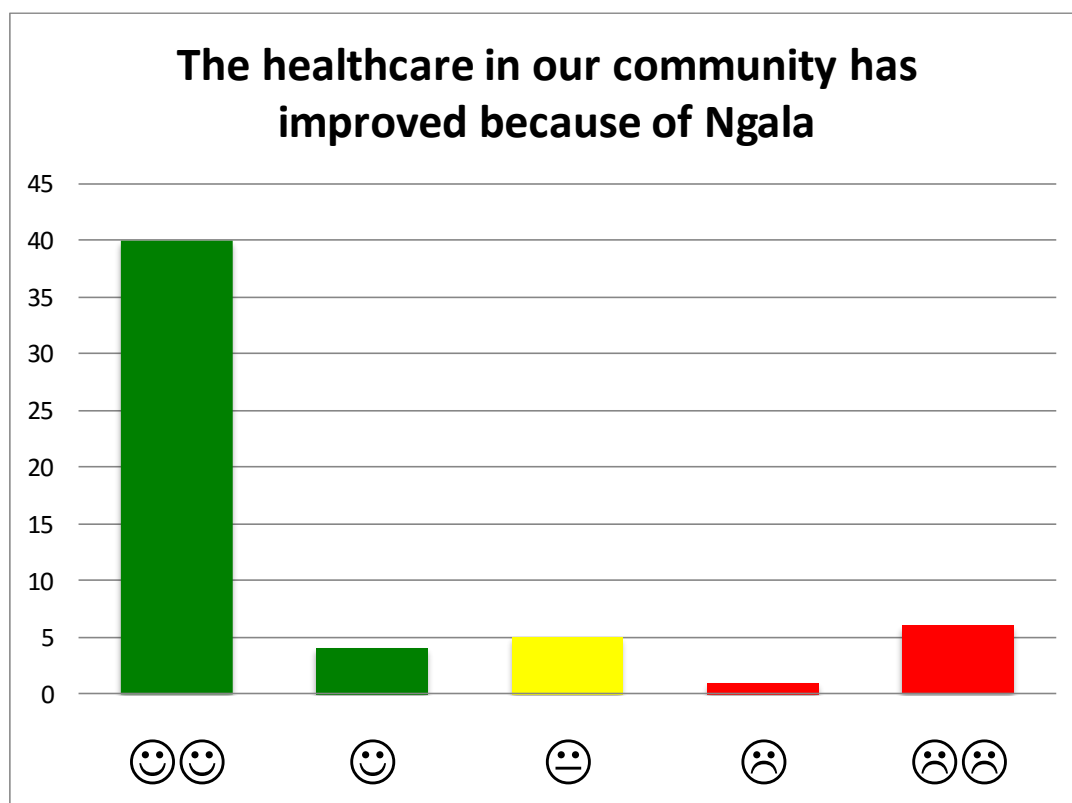
Assessing the benefit match in employment

Graph 10 indicated that 61% of residents felt that andBeyond Ngala were employing enough residents from within their community, while 32% felt that they were not (n = 56).

Graph 10: Community resident's level of satisfaction with the number of people employed by andBeyond Ngala
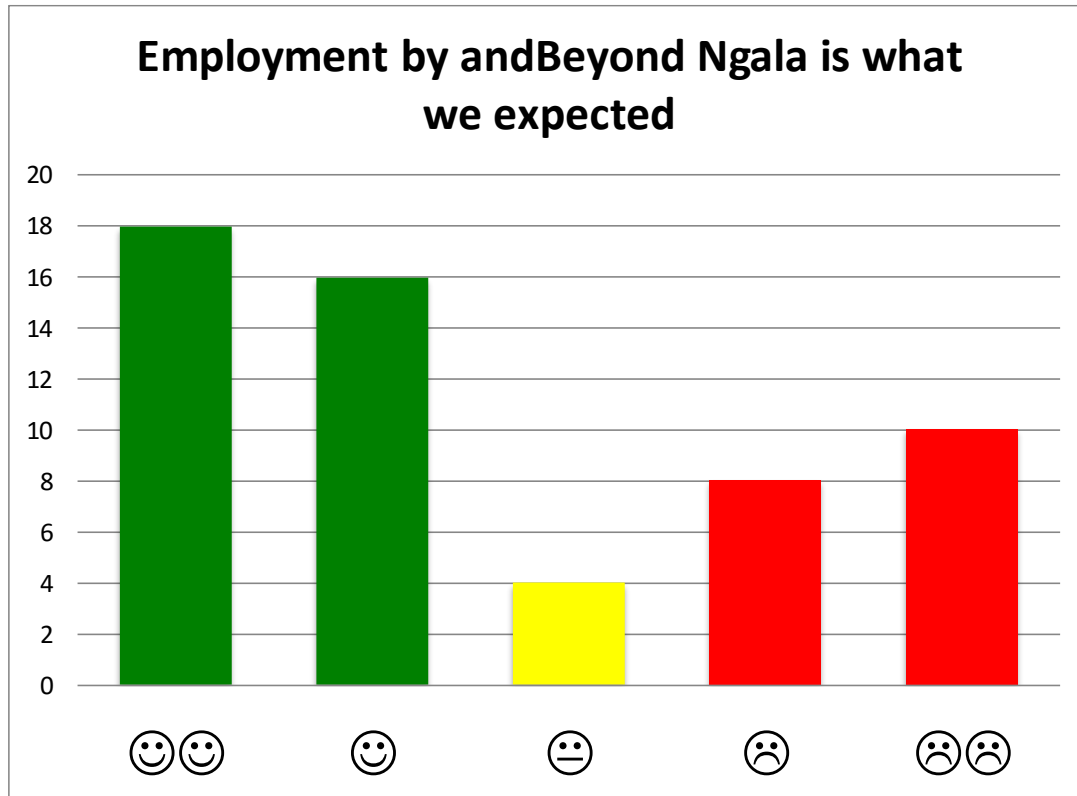
Assessing the benefit match in empowerment

Graph 11 compares three indicators of empowerment (n = 56). The responses show another partial match relationship and a positive result. The last thing that is needed by the communities is a very one-way relationship with andBeyond Ngala, which is very paternalistic in nature. In this case, it is evident from the responses that the relationship between both communities and andBeyond Ngala is not paternalistic, but empowering.

Graph 11: Empowering versus paternalistic relationship between andBeyond Ngala and both communities
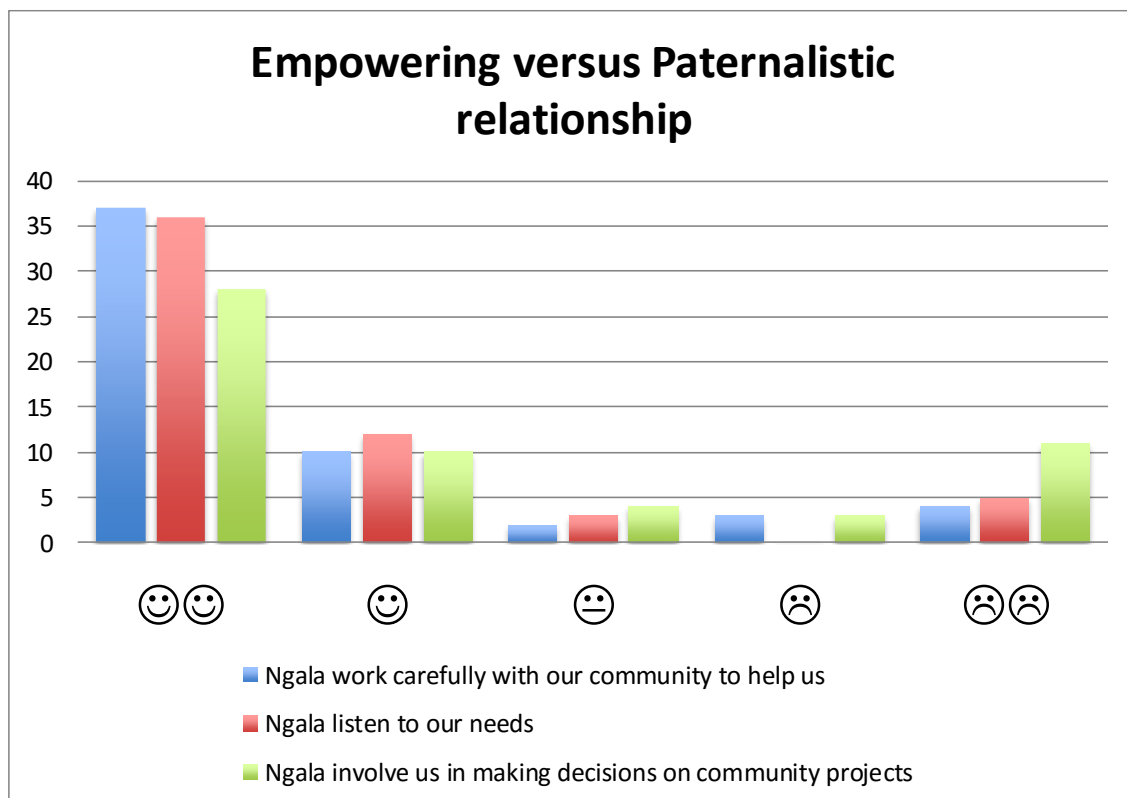
Assessing the benefit match in conservation

As seen in Graph 12, all (100%) local residents agree that tourism has many benefits and should be encouraged, and 98% agree that wildlife is important to their community. It is worrying, however, that 48% of residents admit that they think poaching of wild animals is worse than it was before (n = 56).

Graph 12: Perceptions towards tourism, wildlife, and conservation

95
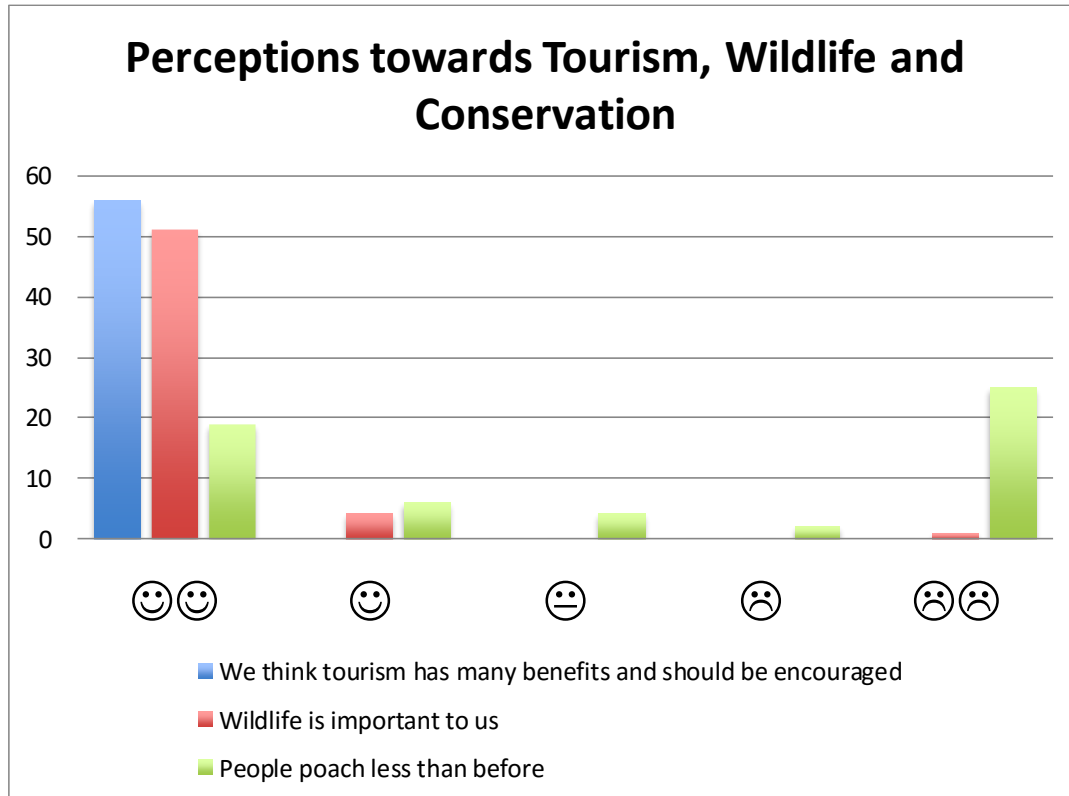
Assessing the benefit match in collaboration with community and government

Graph 13 shows that 73% of respondents felt that their community leaders are honest and that they work hard for the residents (n = 56). Local governance by means of tribal authorities was included to assess a different dynamic, especially due to the fact that andBeyond Ngala works closely with these individuals. Many residents were confused by the question: "The government do more (less) in the community than they used to do" This resulted in 34% of the respondents being unable to provide an answer.

Graph 13: Perceptions towards community leaders and government support

Community Leadership and Government Support

- Community leaders are honest and work hard for us
- The government do more in our community than they used to
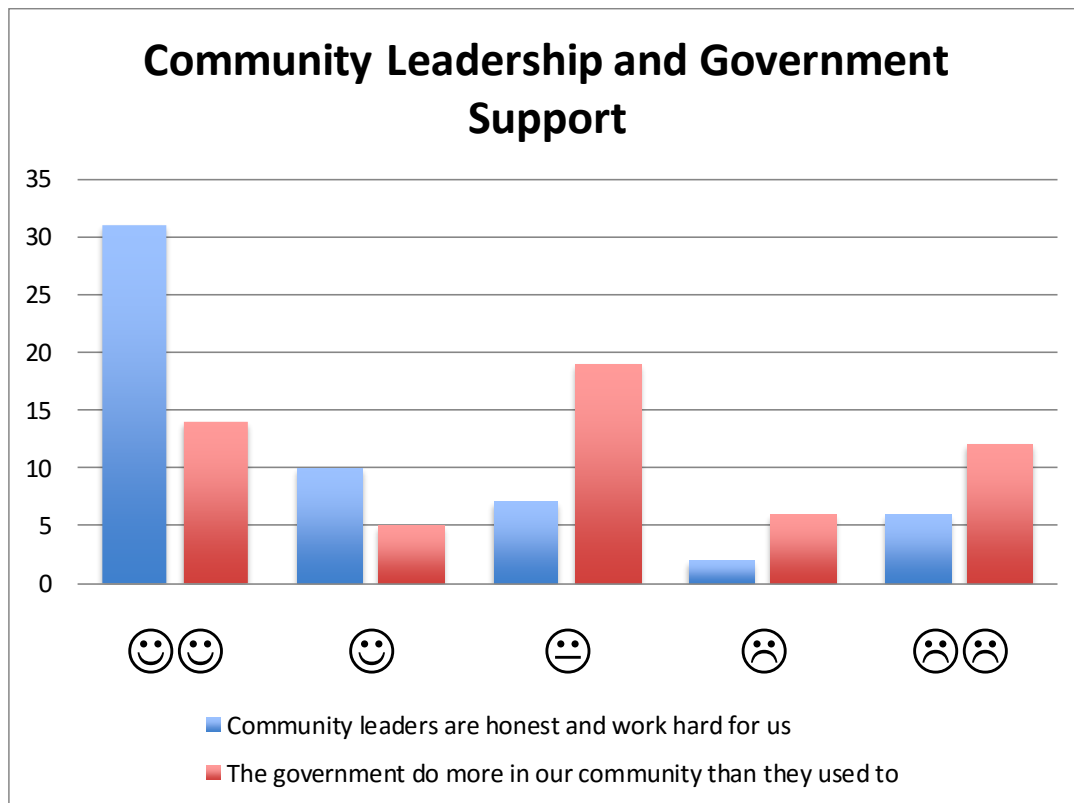
Assessing the benefit match in further education

This construct was one of only two that received a complete match (Graph 14). It also ranked second in the "best thing andBeyond Ngala does for you community" question. The CLEF bursary initiative is attracting good results and 67% of residents in these communities knew of at least one individual who benefited directly from this programme (n = 56).

Graph 14: Further education in the form of CLEF bursaries

I know somebody who has received a study bursary from Ngala

97
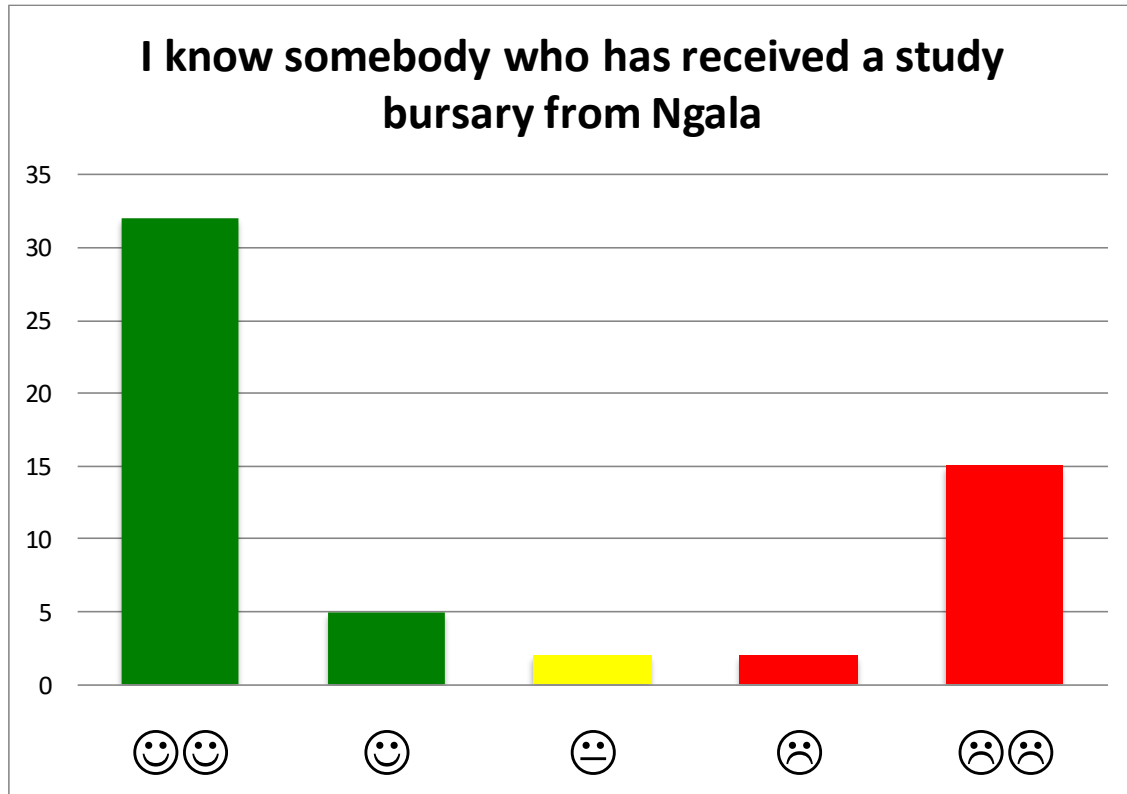
Assessing the benefit match in Ngala/Africa Foundation projects

Graph 15 indicates that 39% of residents were not satisfied with the number of projects within their community (n = 56). 80% were happy that the money being raised for their community was being spent in the best possible way. 77% of residents felt that many people in their community had benefited because of andBeyond Ngala.

Graph 15: Community resident satisfaction with the amount and efficiency of Ngala projects
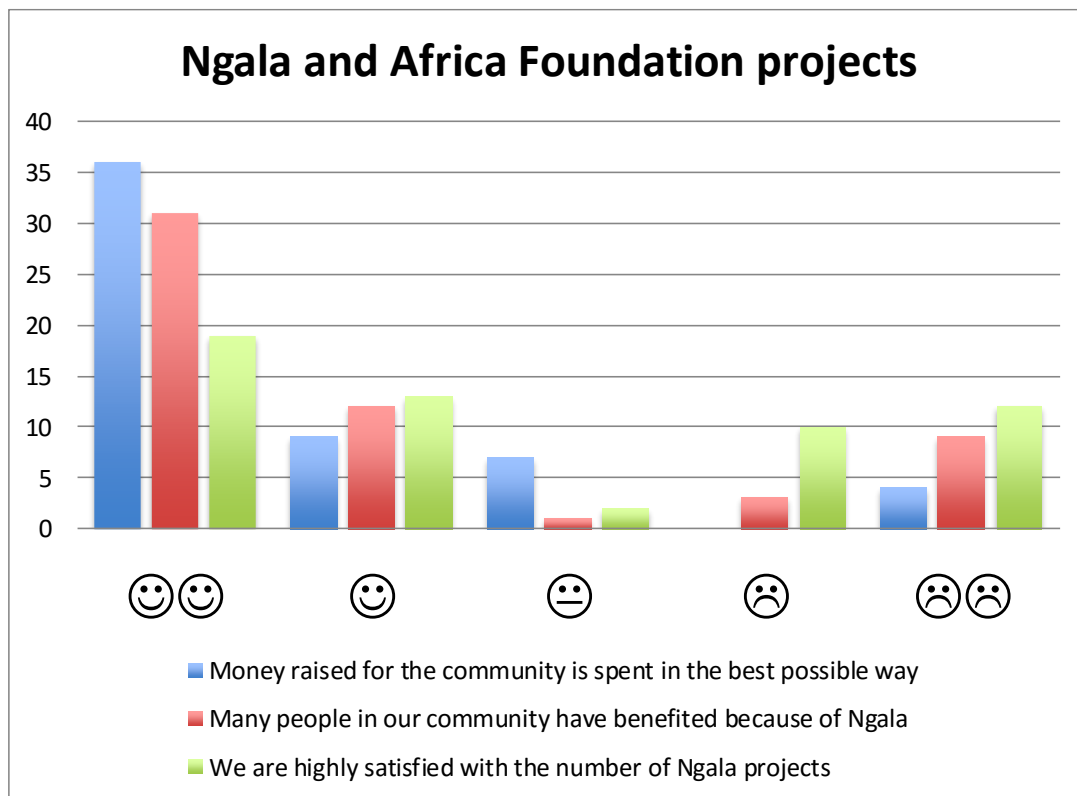
Assessing the benefit match in small business development

Only managers (not communities) suggested that the communities were benefiting due to small business development (Graph 16). 50% of residents felt that businesses in their community employ a lot of people, while 41% did not (n = 56). The remaining 9% were undecided.

Graph 16: Small business development

Businesses in our community employ a lot of people
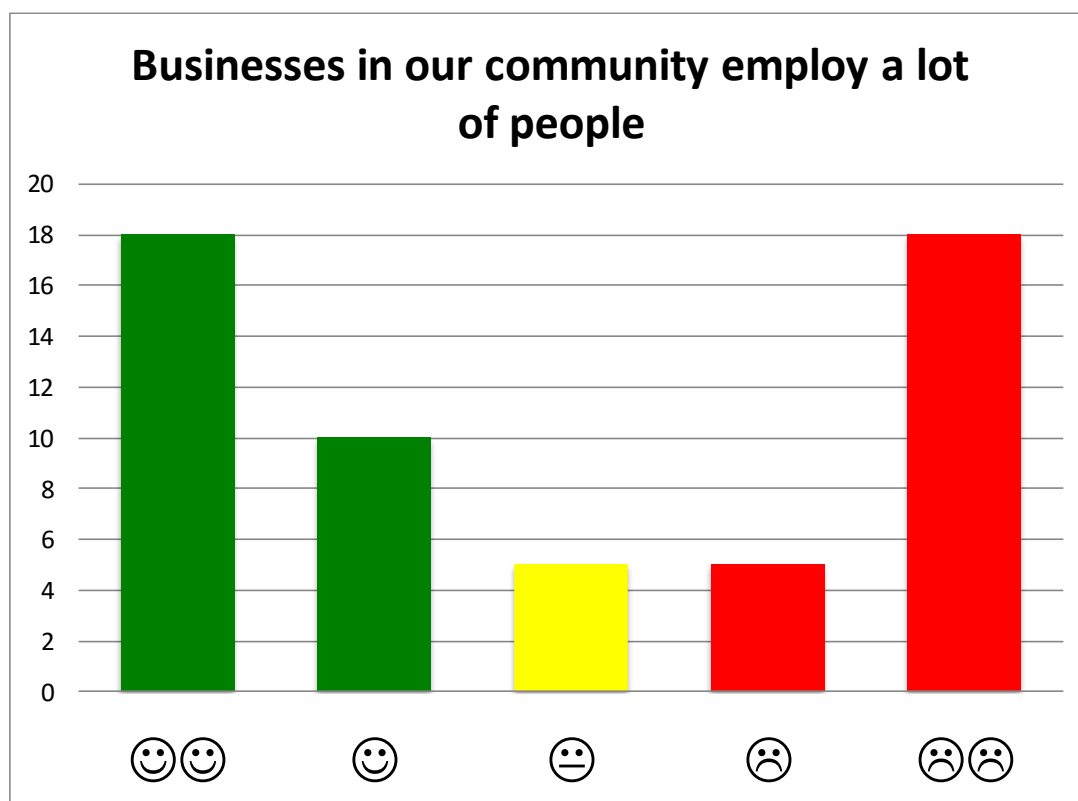
Additional benefits identified by the community

Additional benefits that were recognised by the community but not identified by senior management were most noticeably, the boreholes that were provided to locals to increase their access to water and assistance with ablution facilities (Table 27).

5.4.2   Overall match between perceived benefits identified by management and actual benefits realized by the communities

Table 30 summarises whether a partial or complete match occurred between the perceived benefits identified by senior management and the actual benefits being realised in the communities. Education and CLEF bursaries resulted in a complete (double) match, while healthcare, employment, empowerment, conservation and value judgement projects produced a partial (single) match.

Table 30: Strength of the match between the perceived benefits identified by andBeyond's senior management and the actual benefits realised in the communities.

#	Senior Management - Perceived Benefits	Communities - Actual benefits		Resulting match
		Open-ended	Categorized	
1	Education	Complete	Partial	Complete
2	Healthcare	No	Partial	Partial
3	Employment	No	Partial	Partial
4	Empowerment	No	Partial	Partial
5	Conservation, raising the profile of wildlife	No	Partial	Partial
6	Collaboration between community & government	No	No	No match
7	Further education bursaries	Complete	Partial	Complete
8	Solid, sustainable projects	No	Partial	Partial
9	Small Business Development	No	No	No match

5.4.3   Improving the relationship between Ngala and the communities

Graph 17 illustrates the results from the questions that aimed to assess the relationship between andBeyond Ngala and the local communities. While most respondents felt that there was a positive relationship between andBeyond Ngala and the communities, nonetheless, 96% of residents (employees and non-employees of andBeyond) felt that Ngala staff needed to spend more time interacting with the community.

Graph 17: Level of satisfaction from community residents in terms of their relationship with andBeyond Ngala
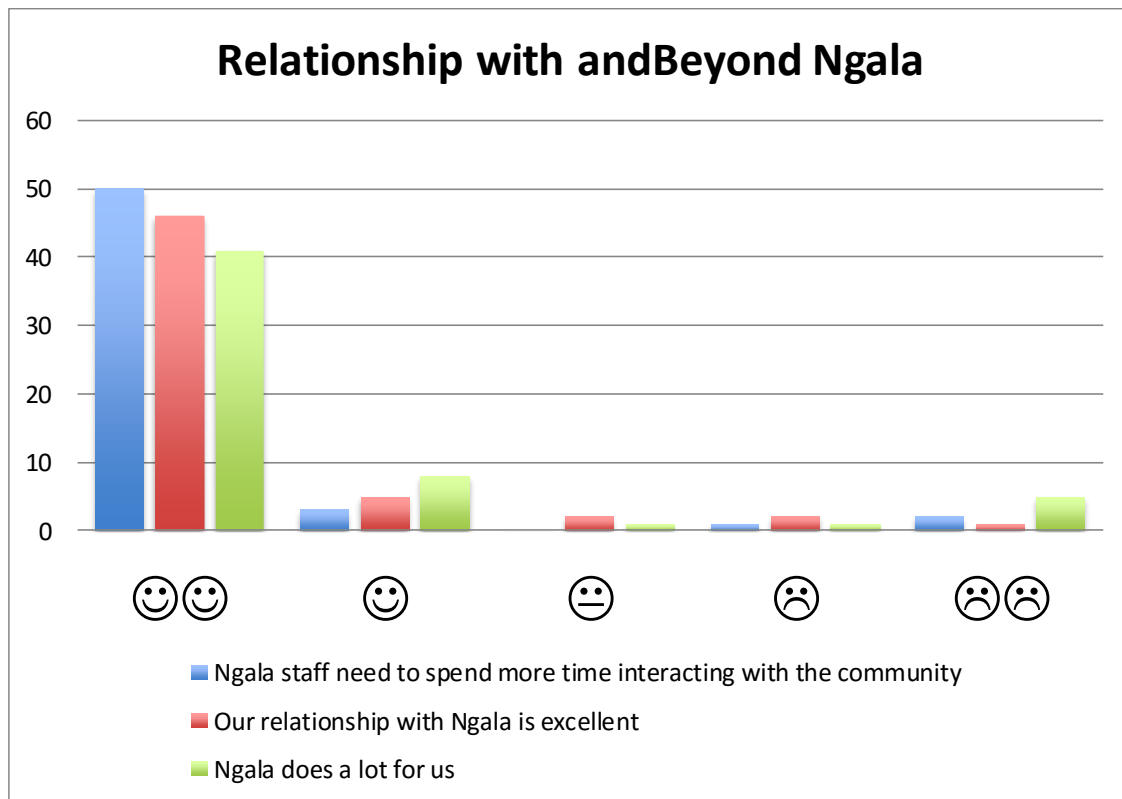
Table 9 indicated that management only agreed on one construct that related to suggestions for improving the relationship between Ngala and the communities; managers agreed that more communication was needed between the lodge and the communities. Graphs 18 and 19 highlight the areas for improvement suggested by Welverdiend and Hluvukani, respectively. The only identified match was highlighted in black.

Graph 18: Recommendations from Welverdiend residents to improve their relationship with andBeyond Ngala
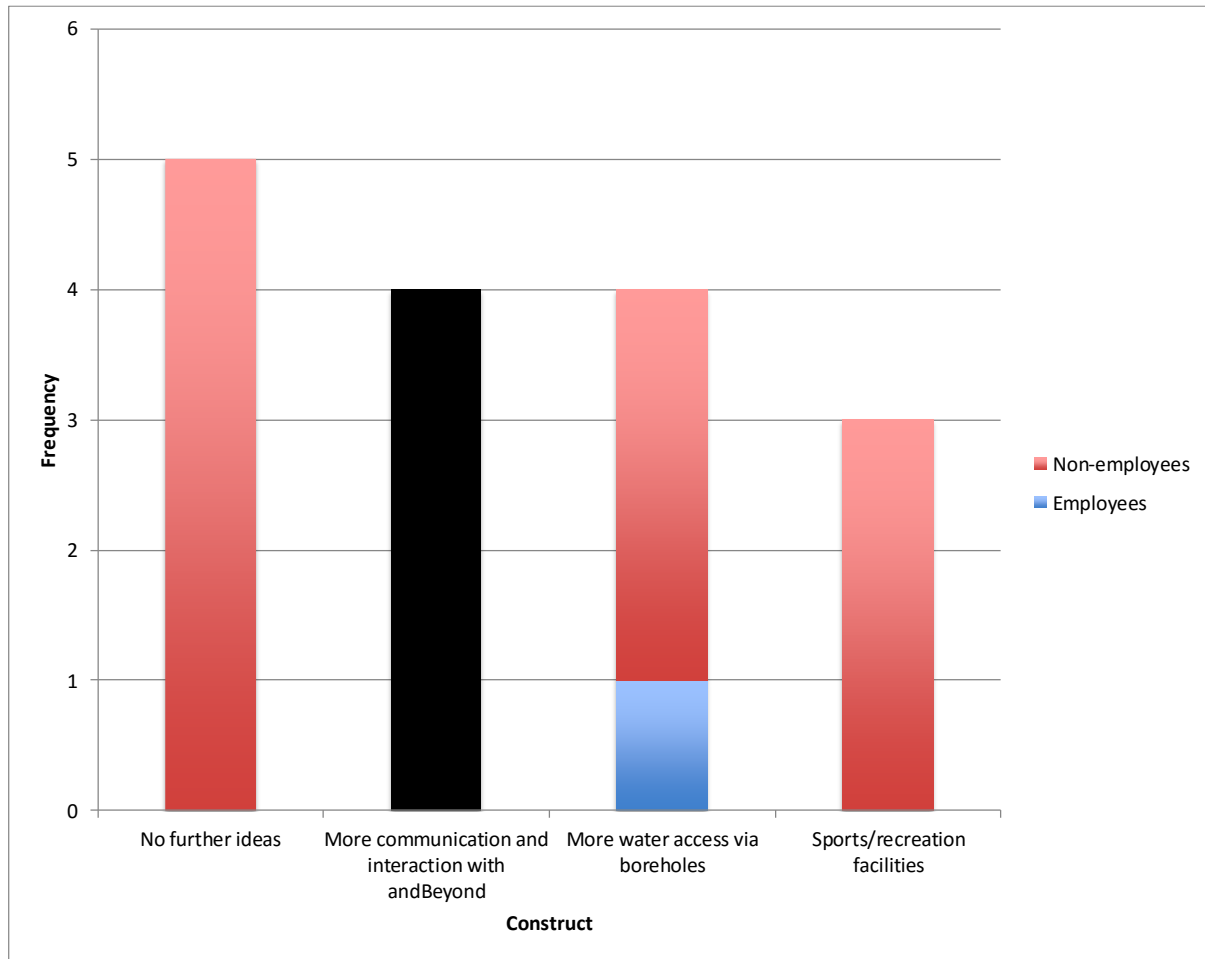
Graph 19: Recommendations from Hluvukani residents to improve their relationship with andBeyond Ngala
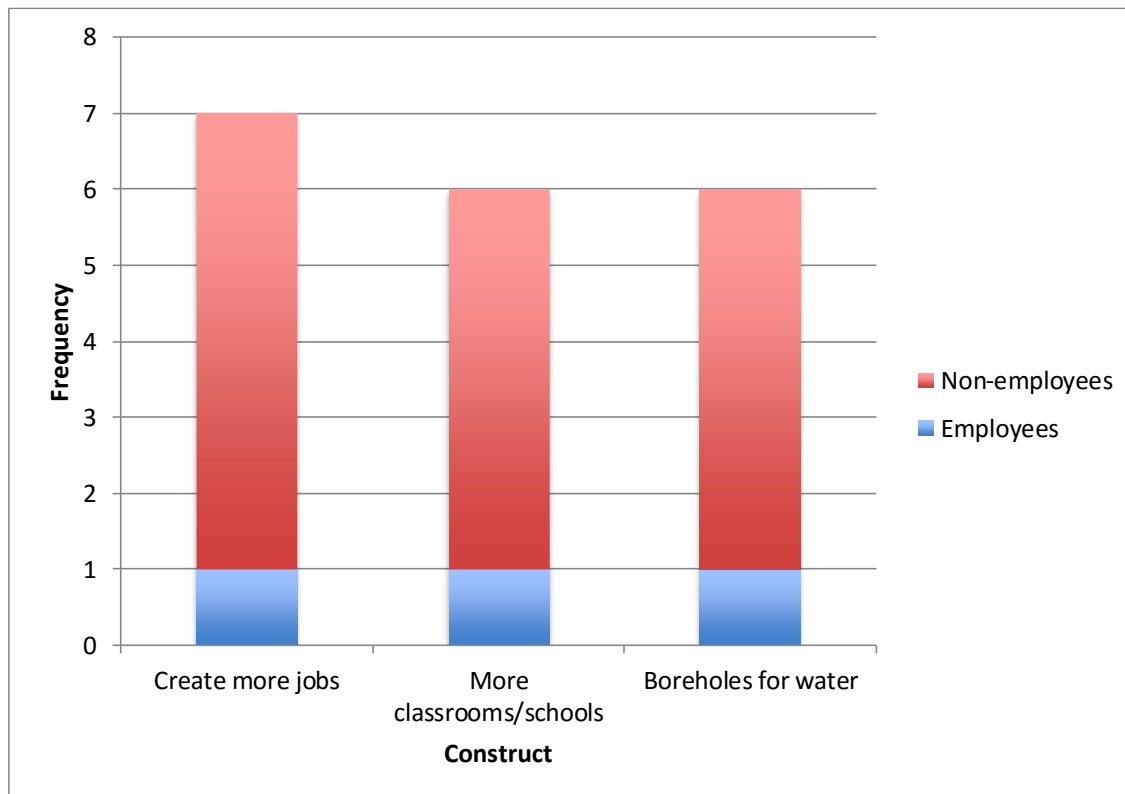
Table 31, which is the last in the results section, indicates whether a partial or complete match occurred between senior management's ideas for improving their relationship with the local communities (Table 9) and those ideas identified by the communities themselves (Table 17/Graph 18 and Table 24/Graph 19).

Is there a match or a mismatch between what the two stakeholder groups (senior management and the communities) want to improve their relationship in the future?

Table 31: Nature of the match between senior management's ideas for strengthening their relationship with the local communities and those identified by the communities themselves

#	Senior Management - Improvement ideas	Community improvement ideas		Resulting match
		Welverdiend		
		Open-ended	**Categorized**	
1	More communication between staff, management and communities/tribal authorities	Complete	Partial	Complete
		Hluvukani		Resulting match
		Open-ended	**Categorized**	
		No	Partial	Partial

CHAPTER 6. INTERPRETATION AND DISCUSSION

6.1   INTRODUCTION

In this chapter, the data analysis from Chapter 5 will be discussed and explained in more detail. Higher-level interpretations will be linked to previous literature in order to put these results into perspective, especially within a business context. The research questions will be addressed, which will enable the researcher to arrive at some conclusions for this study.

6.2   DISCUSSION PERTAINING TO RESEARCH QUESTION 1

Is shared valued being created between andBeyond Ngala Private Game Reserve and Welverdiend and Hluvukani communities?

Porter and Kramer (2011:6) suggest that shared value is all about "enhancing the competitiveness of a company while providing economic and social benefits to the communities in which it operates". andBeyond has proven from the results that the way in which they go about attempting to achieve this is effective. With reference to Tables 4 and 5, it was evident that andBeyond have a clear objective of "providing economic and social benefits to the communities" through their pioneering tourism model based on an ethic that encompasses a conservation philosophy revolving on three core principles: care for the land, care for the wildlife, and care for the people (andBeyond, 2016). Their idea of making wildlife the catalyst for developing communities in order to get the residents to care for the surrounding protected areas and to take more responsibility for their own destiny is in line with commonly applied conservation/tourism practices.

Porter and Kramer (2011:4) claim that the more that businesses have begun to engage in CSR activities worldwide, the more they are being blamed for society's failures. Griseri and Seppala (2010:5) suggested that the term CSR has been overused in too many different contexts and it can now be applied to almost anything. The term has therefore started to lose all meaning and could suffer the same fate as many other popular terms in management literature. Similar to the above views, the term CSR was disliked among some of andBeyond's senior management due to its arguably deflated status within society. From the interviews, some andBeyond managers understood the term of Corporate Social *Responsibility* as initiatives that were more of an obligation rather than a voluntary action. andBeyond places emphasis on social

development actions as a central feature of their core business, as shown in Table 4, which is something they have been doing since their onset in 1992. This indicates that CSR is no new phenomenon to the company. Kvistgaard (2013:18) suggested that CSR activities started out as a purely ethical endeavour. This may have been one of the reasons why the founders of CCAfrica included this aspect into their business model. This too essentially compliments Davis's (1960: 70) definition of CSR: "businessmen's decisions and actions taken for reasons at least partially beyond the firms' direct economic or technical interest".

Senior management were outwardly passionate about community development initiatives and they did not appear concerned about which terminology was used in the corporate world, such as CSR or CSV. Their main objective is just to uplift local communities through conservation. Their motive satisfies all of Carroll's (1991:40) corporate social responsiveness criteria in his pyramid of CSR (Figure 5). These are built on four components: economic, legal, ethical, and philanthropic. andBeyond formed the important partnership with the Africa Foundation to assist with this component of their business. The Africa Foundation's motto is appropriate: "Empowering Communities. Enabling Conservation". Caution must be taken however, because mission statements can become completely irrelevant if the results do not match these objectives. andBeyond offers the Africa Foundation support directly through office space, employee time, marketing, and a substantial financial philanthropic injection. The USD 1 million that andBeyond gives the Africa Foundation each year goes towards supporting their expertise and experience in community development. According to Porter and Kramer (2011:4), CSV is where economic value is created in a way that also creates value for society by addressing its needs.

Table 27 showed positive results in terms of andBeyond employee and non-employee resident satisfaction with their relationship with andBeyond Ngala Private Game Reserve. Table 29 showed data from both communities with regards to the value that residents place on wildlife and the importance of tourism operations in the area. These findings contradicted Stronza and Gordillo's (2008:448) theory that tourism is notorious for disrupting, disturbing, or doing damage to local communities. Instead, the results support previous research conducted in the same area by Spenceley (2001:156) who showed that the contribution made by Ngala towards the development of the Welverdiend community was very positive, and later Hendry (2002:95) who showed that residents in this area had a positive attitude towards the practice and concept of conservation.

106

Tables 27, 28, and 29 indicated what has been achieved by one of andBeyond's properties in the communities near which it operates. This project only assessed the relationship between one of andBeyond's property and two communities; however, andBeyond and the Africa Foundation have been involved in more projects in the area but outside of these communities, such as Bilton High School in Hlabakisa. Furthermore, as mentioned in Chapter 2, andBeyond Ngala Private Game Reserve is where just two of the 29 different lodges in the large andBeyond portfolio are situated. andBeyond and the Africa Foundation are adopting the very same principles and techniques within a 50 km radius of all of their lodges. Similar results could be reached at the other lodges should this research be replicated, but these assumptions cannot be made until that research has been conducted. Currie (2001:i) deduced from his research at andBeyond Phinda Private Game Reserve that those communities that experienced higher levels of benefaction and development from surrounding game reserves result in genuine involvement in conservation.

These examples encompass the first of the five propositions for social responsibility that Davis (1975:20-23) highlighted: businesses have immense social power. To think a step further, imagine if similar actions were carried out across all game reserves within all developing countries worldwide. This, in essence, is what eco-tourism is or should be all about. Have andBeyond become recognised as a successful eco-tourism operation? This research confirms that they deliver on the three major aspects incorporated in almost every eco-tourism definition: care of the environment, support of conservation initiatives and assisting with benefits towards local communities (Shoo & Songorwa, 2013:76).

In a pioneering change for successful land redistribution in South Africa, andBeyond and the Makhasa and Mnqobokazi community *Inkosis* (chiefs) signed a groundbreaking land-claim settlement. This agreement was in favour of the communities receiving 9,500 hectares of pristine andBeyond Phinda Private Game Reserve land that they were previously dispossessed of during Apartheid. In order to ensure on-going profitable eco-tourism, andBeyond (2011) understood that it was necessary to own the business but not necessarily own the land. In a press release statement from andBeyond:

"South Africa's Minister of Agriculture and Land Affairs Lulama Xingwana, Inkatha leader and chairperson of the KwaZulu-Natal House of Traditional Leaders Mangosuthu Buthelezi and a raft of other dignitaries joined more than 4,000 joyous

107

community members for the official ceremony on 11 August 2007" (andBeyond, 2011).

It is highly unlikely that something similar will happen at andBeyond Ngala Private Game Reserve due to the fact that the WWF of South Africa owns the land. There are, however, currently land claims on Ngala Private Game Reserve (2013). There has also been a history of strike action within Welverdiend during 2011 and again in 2013/14 due to wage negotiations. That time was a tricky transition period for andBeyond Ngala to manage because the lodges needed to continue to operate, and the emphasis on delivering an amazing guests experience also needed to be maintained. Strike action, however, is not always a bad thing. Through trade unions and shop stewards, staff and residents had an opportunity to have a detailed look at the andBeyond Ngala organogram, their salary packages, turnover, and exposure. Times like these force all parties to communicate more effectively. For example, do the communities know that 78% of staff working at andBeyond Ngala are from local communities within the area?

In Table 27, the research findings show that 80% of local residents from both of the communities felt that the relationship between andBeyond Ngala and their community was good. The researcher was surprised, however, to find that 100% of the non-employees (38 respondents) that were interviewed knew about andBeyond Ngala Private Game Reserve. They may not all have known about the work that andBeyond were performing within the communities, but they certainly knew exactly where the reserve was situated and had heard the name before. It was also interesting to note that most of the interviewees just knew the word 'Ngala' and not the names 'andBeyond' or the 'Africa Foundation'. This is understandable as andBeyond changed their name from CCAfrica in October 2008 and the Africa Foundation has also had a few name changes over the years. It was only the community development forum leaders and a few others that fully understood the partnership between andBeyond and the Africa Foundation and how they work together to promote community development through conservation. *Ngala*, therefore, was mentioned in all the interviews to prevent confusion and thus was most likely credited or criticised in the results chapter too. It is important to consider this when processing the information, even though the Africa Foundation is predominantly doing the work in the communities.

The level of satisfaction of the residents in Welverdiend with regards to their relationship with andBeyond Ngala was noticeably higher than in Hluvukani. This was evident when comparing

Tables 13 and 20, especially with regards to the responses from non-employees in Hluvukani. It was also clear from the results that employees were more praising of the relationship between andBeyond Ngala and the communities than non-employees. This was to be expected, as the staff are more informed about current projects and are occasionally even involved in handovers in their communities. Tables 17 and 24 showed that employees from both Welverdiend and Hluvukani were proud to work for andBeyond Ngala. This may be as a direct result of these employees having a buy-in to the company's community development initiatives.

As mentioned in Chapter 3, Pfitzer *et al*. (2013:3/4) recommend that five mutually reinforcing elements are key to deliver social benefit and financial success concurrently. The researcher believes that andBeyond together with the Africa Foundation have successfully achieved two of these elements: embedding a social purpose and rigorously defining the social need. andBeyond/Africa Foundation are currently in the phase of trying to achieve the third element, which is determining how to measure shared value. Once this has been achieved, the fourth element of optimal innovative structures should be created and the fifth element (and very importantly for andBeyond) of co-creating with external stakeholders by involving them all should be addressed.

Despite no universally agreed upon measurement of shared value available, the positive results from this exploratory case study suggest that shared value has been created. In short, the community are deriving benefits from living adjacent to a protected area, and the company have more satisfied, educated, and motivated staff who are more willing to conserve and protect the natural resources in the area. This being said, there is still much room for improvement. This conclusion is made without proving that there is a linkage between economic performance and social value. Still, no previous research has provided any conclusive evidence in this regard (Porter *et al*., 2011:13).

6.3   DISCUSSION PERTAINING TO RESEARCH QUESTION 2

Is there a match or mismatch between the perceived value created by the reserve's senior management and the actual value these communities understand they receive in the form of benefits?

Table 30 highlighted whether the perceived benefits identified by andBeyond's senior management receive a partial or complete match with the actual benefits being realised in the

communities. If the perceived benefits identified by management match the actual benefits being realised in the community, a complete match will be the result. These benefits were identified without asking respondents to agree or disagree with a specific statement. Should a positive response be the answer to a predetermined categorised construct question, assessing a specific benefit, a partial match will be the result.

6.3.1 Complete-match benefits

From Table 30 and Graph 6 to 8, it can be seen that education was certainly at the core of all avenues that lead to assessing the shared benefits within the local communities. It is encouraging to see that both andBeyond and the community realised this benefit. This resulted in a complete match, which is the most ideal scenario for both parties concerned. The future of these communities can only look brighter with better education facilities and greater opportunities for the youth; these results, however, may only come into fruition in years to come. andBeyond can only do so much by providing these facilities, yet the level of education predominantly falls within the scope of government.

On a side note, an andBeyond manager shared a success story with the researcher during the interview process. To date, the Africa Foundation has proudly seen at least six individuals who have followed the complete cycle of education. These children attended crèches and primary and secondary schooling (all of which would not exist without the direct influence and funding assistance of andBeyond and the Africa Foundation). They were then also recipients of CLEF bursaries and all graduated with a tertiary qualification. Community development is certainly a process and not just an event, as Biswas and Biswas-Tortajada (2014:1) cautioned; they stated that transforming a society takes time, especially when trying to leave a legacy by having a positive and long-lasting impact.

The CLEF bursary construct was the only other construct to receive a complete match, as indicated in Table 30 and Graph 6, 7, and 14. These benefits were reflected as being received relatively equally between employees and non-employees within Welverdiend, although few non-employee residents of Hluvukani saw any benefit from this programme. This is unusual, as Figure 4 highlights that 28 residents from Welverdiend and 24 residents from Hluvukani have been recipients of CLEF bursaries. Over ZAR 6 million has been spent on actual bursaries to date with these students attending 76 different academic institutions across Africa. 2016

marks the 20th anniversary of the CLEF bursary programme, which has already helped 439 graduates (Africa Foundation, 2016).

The researcher could not help but feel a little frustrated when learning that after receiving CLEF bursaries, most of these individuals leave their communities in search of a better lifestyle in major cities around South Africa. These young aspiring residents should not be blamed for this, as they are following their dreams and pursuing opportunities; however, with these individuals leaving their communities, little is done in giving back to help their communities in the future. Perhaps this is an unfair observation from a short-term cross-sectional study of this nature, but it was duly noted regardless. Some residents may send financial remittances back to their communities but this was not explored further. Perhaps, in the future, the CLEF programme can be modified to include localised internships and training as an option.

6.3.2   Partial-match benefits

Another five of the perceived benefits identified by senior management received a partial match. These were in healthcare, employment, empowerment, conservation, and value judgement projects. These results were shown in Table 30.

With regard to healthcare, andBeyond's senior management emphasised supporting facilities for better healthcare within the communities, but less than 9% of residents mentioned this as a benefit from the relationship in their open-ended question responses. When residents were prompted to comment on the healthcare in the categorised questions, however, the results were completely different. The majority of residents indicated that the healthcare in their community had improved because of andBeyond Ngala. This was shown in Graph 9, highlighting a partial match.

The third highest ranked construct according to andBeyond's senior management was employment; however, this was hardly recognised as a benefit by the local communities in the open-ended questions. In fact, their responses in the categorised questions did not yield a very positive response either (Graph 10). This resulted in a partial match, albeit an unconvincing one. According to Spenceley (2001:156), she discovered a great deal of frustration within Welverdiend regarding the lack of opportunities for employment, training, and infrastructural

development was being felt. It would appear that this frustration, especially with regards to employment opportunities, still remains.

Empowerment resulted in another partial match relationship. Graph 11 illustrates that a healthy relationship currently exists. Paternalistic or empowering relationships may be beyond the understanding of many community residents who often expect service delivery rather than self-development. This may explain why neither community highlighted this construct as a benefit. It would be detrimental if the relationship between andBeyond Ngala and the communities was very one-sided and paternalistic. This relationship should never become a dictating one. A very careful balancing act is required. The Africa Foundation has been instrumental in utilising an important consultation process that allows communities to control their own destiny. This was raised in Table 10. During this consultation process, community leaders identify the needs within their community and then the Africa Foundation will generate funding. The Africa Foundation relies on a project committee from the community to steer the whole process, although the foundation's experience is also used to facilitate the process. Employed builders then empower unemployed residents by teaching them how to build in the construction phase. With the residents being actively involved in the building of their own facilities, more accountability, responsibility, and care is taken of the finished products. Spenceley (2001:179) determined that the mechanisms of consulting that existed were working and that they should persist. This research indicates that this is still the case.

Conservation, in the researcher's mind, would be one of the toughest constructs to achieve a complete match with. In many respects, even achieving a partial match given South Africa's political conservation history should be considered a success. This is an encouraging discovery for the preservation of wildlife in South Africa. With reference to Graph 12, it is still a huge concern that 45% of residents in the local communities felt that poaching is getting worse, specifically with the demise of the rhino.

Graph 15 highlights the positive response towards value judgement of Ngala/Africa Foundation projects from the open-ended questions. This produced a partial match. It was interesting to see that 39% of residents were expecting more projects. This could either be as a direct result of a lack of deliverance over an extended period of 20 plus years, or it could also be a case where more deliverance results in rising expectations.

6.3.3   No match benefits

The remaining two perceived benefits identified by andBeyond's senior management received no match: small business development and collaboration with community and government.

Small business development within local communities is one of the shared goals targeted by andBeyond and the Africa Foundation. 50% of respondents felt that businesses in their community employ a lot of people. More than 50% (the majority) was required, however, to receive a partial match. Therefore small business development in the communities comes close, but receives no match at all. Graph 16 suggests that local businesses are not employing a lot of local people. Table 6 indicates that local businesses could help the communities to start supporting themselves. Although a few residents mentioned their satisfaction with the craft centre that the Africa Foundation helped to build, when asked about local business, the response from one teacher was "what local businesses?" Creating a link between the CLEF bursary programme and small business development could address this issue.

The construct 'collaboration with community and government' received no match. An obscure link exists between andBeyond intervention and government support. Local governance by means of tribal authorities was included in the categorised interview questions to assess a different dynamic, especially due to the fact that andBeyond Ngala work closely with these individuals. It would appear that the majority of residents (55%) were happy with their current tribal authorities and the work that they are doing within their communities. Satisfaction with government intervention received inconclusive evidence of a majority construct.

6.3.4   Additional benefits identified by the communities

andBeyond's senior management did not identify some benefits that were being realised in the community. For example, both communities were grateful for the assistance that they had received in the form of boreholes to provide locals with better access to clean water. Assistance with more ablution facilities was also acknowledged (see Table 27). Both of these constructs, boreholes and ablutions, satisfy basic human needs and many individuals take this for granted.

Between 12,5 and 14% of respondents said andBeyond Ngala had done nothing for their community, as noted in Tables 27 and 28, which capture the responses from open-ended questions about benefits.

In conclusion, Table 7 highlighted the costs involved in providing the benefits to the local communities, while Table 8 showed senior management's support that the benefits being afforded to the local communities certainly outweigh the costs incurred to provide many of these benefits. From the above interpretation, the perceived benefits identified by senior management do match those benefits that are actually being realised in the local communities, bar collaboration between community and government and small business development. Education and the CLEF bursaries programme were most appreciated within Welverdiend and Hluvkani, resulting in a complete match, while healthcare, employment, empowerment, conservation, and value judgement projects produced a partial match, as indicated in Table 30.

andBeyond must be mindful of the continuous need to remain innovative in providing assistance to their local communities, which is not always easy with limited resources. This echoes Drucker's (1973: 58) view that economic forces set the limits to what management can and cannot achieve. Managers need to cleverly adapt to find ways to operate effectively as seemingly rival financial and societal demands continue to intensify (Margolis & Walsh, 2003:296). In a long-term self-interest, by benefiting the communities in which one conducts business, long-term profit maximisation often results (Davis, 1973:313). Furthermore, turnover and absenteeism may be reduced, recruitment and retention of staff may show improvements, and an organisational culture can grow stronger. The results in this study were in direct contrast to Hendry's (2002:96) findings 14 years ago when he concluded that the majority of respondents from Welverdiend claimed that they received no benefit at all from tourists in the KNP.

6.4   DISCUSSION PERTAINING TO RESEARCH QUESTION 3

Is there a match or a mismatch between the ideas that the two stakeholder groups (senior management and the communities) believe will strengthen their relationship in the future?

Table 31 indicates whether a partial or complete match occurs between senior management's ideas for strengthening their relationship with the local communities and those identified by the communities themselves.

Approximately 86% of Welverdiend residents felt there were no problems that existed between their community and andBeyond Ngala (Table 16), whereas, a noticeably lower 67% of

Hluvukani cited the same answer (Table 23). In Table 9, 70% of senior management indicated that more communication was required between staff, management and the communities, while Graph 17 showed how 96% of residents agreed that more interaction between andBeyond Ngala and the community was required, when asked about this in the form of a categorised question.

6.4.1 Complete-match improvement ideas

In the open-ended questions, the residents from Welverdiend suggest that more communication and interaction with andBeyond Ngala was needed. More access to water was their second highest ranked construct. This was indicated in Table 17 and Graph 18. This matched what senior management had identified (Table 9). Both parties identified the same area of concern, meaning that it is a problem that needs to be improved in order to strengthen the relationship.

6.4.2 Partial-match improvement ideas

The Hluvukani community, on the other hand, identified more employment opportunities, assistance with education, and more water access as ideas to strengthen their relationship with andBeyond Ngala. This was indicated in Table 24 and Graph 19. None of the Hluvukani improvement ideas matched the ideas of andBeyond senior management (Table 9).

6.4.3 Additional recommendations highlighted by the communities

Despite access to water being on both of the communities' "how can andBeyond Ngala work better for your community" lists (Tables 17 and 24), only 20% of senior management had identified this as a direct benefit that the community were receiving from the relationship (Table 6). It was also not identified as an aspect to target to improve the relationship going forward (Table 9). From these results, it came as no surprise that this basic need received so much traction during the data collection in the study, as there has been a severe drought in South Africa in 2016.

Table 31 summarises that the improvement ideas in Welverdiend received a complete match with those of andBeyond's management, while the improvement ideas in Hluvukani only received a partial match. This indicates that improving the relationship between andBeyond Ngala and Welverdiend might be shorter and somewhat easier than the work that is required to strengthen the relationship between andBeyond Ngala and Hluvukani.

6.5   CONCLUSION

Shared value is being created between andBeyond Ngala Private Game Reserve and Welverdiend and Hluvukani communities. Both communities are deriving benefits from living adjacent to a protected area and the company has more satisfied, educated, and motivated staff who are more willing to conserve and protect the natural resources in the area. Results in this study confirm that the perceived benefits identified by senior management do match those that are actually being realised in the local communities, bar collaboration between community and government and small business development. As a result, andBeyond Ngala employees showed more pride and job satisfaction. While the results of this study are encouraging for all parties involved, there is still much room for improvement.

CHAPTER 7. CONCLUSIONS AND RECOMMENDATIONS

7.1   INTRODUCTION

The chapter summarises the findings in the study in the light of relevant literature. Recommendations will then be made to all stakeholders that were involved in the study and lastly, suggestions for future research will be discussed.

7.2   CONCLUSION

At least two writers have suggested that in South Africa's history, the constitution and laws have failed to consider the rights of people in communities with regard to natural resource exploitation and protection (Currie, 2001:16; Khan, 2002:64). Similarly, other authors suggest that protected areas in developing countries have not necessarily been the most successful instruments for achieving long-term conservation success (Pimbert & Pretty, 1995:43). Results from this study contradict the above statements, highlighting that nature conservation, through the establishment of protected areas and Nature Parks, is the best form of land use. This viewpoint, however, only becomes a reality if there is job creation and economic growth, community upliftment, and sustaining the environment through conservation education. All of the above characterise the relationship between andBeyond Ngala and Welverdiend and Hluvukani communities.

The results from this exploratory case study suggest that some shared value has been created. Some community members perceived that they are deriving benefits from living adjacent to a protected area and the company have more satisfied, educated, and motivated staff who are more willing to conserve and protect the natural resources in the area. No previous research in CSV has provided any conclusive evidence in this regard (Porter *et al*., 2011:13).

There was a match between the perceived benefits identified by senior management and those that are actually being realised in the local communities, bar collaboration between community and government and small business development. These results were in direct contrast to Spanceley's (2001:178) and Hendry's (2002:96) findings.

117

There was also a match between senior management's ideas for strengthening the relationship between andBeyond Ngala and Welverdiend and those improvement ideas that were identified by the residents of Welverdiend. Strengthening this relationship will therefore need more frequent interaction and communication between both parties, as this was the construct that produced the match. There was a mismatch between senior management's ideas for strengthening the relationship between andBeyond Ngala and Hluvukani and those identified by the residents of Hluvukani. Strengthening this relationship is going to take more consultation and time.

andBeyond and the Africa Foundation together facilitate the socio-economic development of the Welverdiend and Hluvukani communities that neighbour andBeyond Ngala Private Game Reserve. Every company, no matter the industry, should have the intrinsic obligation to give back to their community. It has become our duty, as conservation professionals and members of society, to seriously examine how local communities will tangibly and immediately benefit from conservation activities (Pimbert & Pretty, 1995:29). The andBeyond eco-tourism model provides hope for conservationists, environmentalists, businesses, scholars, civil society and most importantly, our heritage. Together with the Africa Foundation, two different business models are working together to create shared value. This has been proven from the results shown in this research. Determining a specific technique or method to measure shared value, however, will be the biggest challenge for andBeyond and many other companies in the future.

Ben Brangwyn stated that "if we wait for the governments, it'll be too late; if we act as individuals, it'll be too little; but if we act as communities, maybe it'll be enough" (Connelly, Smith, Benson & Saunders, 2012:124).

7.3   RECOMMENDATIONS

The following recommendations are made to the majority of stakeholders in this research: the andBeyond staff, the Africa Foundation staff and the residents of the Welverdiend and Hluvukani communities. These recommendations exclude guests of andBeyond, ten of whom participated in the study.

First and foremost, as the results suggested, more communication and integration is needed between andBeyond Ngala staff and management at the local communities. Regular meetings

involving the Africa Foundation, tribal authorities, and lodge staff could alleviate potential conflicts and provide the opportunity to share information and to allow communities to feel more involved in andBeyond's corporate-decision making. An element of transparency is important.

An increasing number of young environmental scholars are hypothesising that the real connection between eco-tourism and conservation comes through participation in ownership and management, rather than through economic benefits alone (Stronza & Gordillo, 2008:451). Table 10 showed that local communities do not influence the way in which andBeyond runs their business. Smith (2003:60) believes that there is also a sense that people now 'matter' in places where, according to those in power, they never used to matter before. There is a lot of truth in the statement that "educated professionals have plenty to learn from the uneducated and illiterate". This, in time, calls for the need to engage these communities as a management partner. There will be costs involved in incorporating co-management, collaboration, and governance methods. These costs, however, are tiny compared to the costs of a lack of individual morale and patriotism, a continuation of exploiting natural resources, and the legacy of an environment that is damaged beyond repair.

From the andBeyond Ngala guest's perspective, more could and should be done to market and advertise the work that andBeyond have done and is currently doing within the local communities. Only 10% of guests knew about the work that andBeyond were doing in the local communities prior to arrival. It will be difficult to increase this above 50% because many travellers do not scrutinise all the information sent to them before they travel, and many guests are travelling through tour operators. 10% was a lot lower than expected. What is more within andBeyond's control, however, is that 100% of the guests need to leave the lodge with a better knowledge of the supported projects. The current 50% margin of guests leaving the lodge with the knowledge of andBeyond's community development initiatives in the area identified in this research is a failure and a missed opportunity. This experience that the guests are exposed to also encourages the funding for new projects. The more andBeyond guests that visit the communities, the more they are likely to leave South Africa with the authentic local cultural experience that they deserve. The more tangible the experience, the more impact it will have on guests. A constant presence in the neighbouring communities is therefore paramount to success.

Weaker benefits and alignment were measured in Hluvukani. This suggests that the Africa Foundation programme officers need to facilitate more guests visiting Hluvukani, despite the community being slightly further away from the reserve than Welverdiend. This would initiate more interaction within Hluvukani and hopefully, more satisfied residents.

More of a presence from andBeyond Ngala and their guests needs to be felt within the communities. It is the result of no small effort that guests are able to gain access to these communities and to participate in a variety of activities, but this is being underutilised. Further, employees from both lodges need to be more informed and involved in specific community projects. One manager or ranger speaking about rhino poaching at a community handover is simply not enough. Conservation lessons, where rangers from the reserve take school children out on day drives, should ideally happen more frequently. This will enhance more contribution from the youth towards bio-diversity conservation. Such actions are different from the prevailing perspectives of Pimbert and Pretty (1995:5), who stated that many conservation initiatives have historically been achieved through enforcement. This approach is very different.

Although andBeyond Ngala Private Game Reserve falls within the KNP and is therefore a protected area, it does not mean that locals should be excluded from it. As the data in this study shows, people really like and appreciate wildlife and tourism. Separating people from nature is not the answer. This recommendation comes from from Pimbert and Pretty (1995:5), who stated that the majority of conservationists have falsely believed that there is an inverse relationship between human actions and the well-being of the environment. This is a process that begins with an indirect link, such as what andBeyond and the Africa Foundation have already achieved in the local communities, and then progresses from there onwards. The idea is to build developed-related relationships between biodiversity and the surrounding people, thus incentivising local stakeholders to directly benefit from this relationship (Salafsky & Wollenburg, 2000:1425). The central issue for new conservation science is to find effective ways of putting people back into conservation (Pimbert & Pretty, 1995:22).

One comment from a non-employee in Welverdiend provided the researcher with a disconcerting realisation. The student in his/her 20s said: "All Ngala's help depends on guest funding. This is bad. If there are no more guests, there will be no further projects". This comment touches on two aspects. Firstly, andBeyond needs to get as many guests into the

community as possible, which has already been addressed. Secondly, so much more value could be created in the local communities if andBeyond became more reliant on local businesses. Education has received huge attention over the last 25 years in Welverdiend and Hluvukani, but perhaps it is time for a shift of focus towards more small business development and entrepreneurial growth. andBeyond already uses some local businesses such as staff transport, piggeries, rubbish removal, and fire wood suppliers. In an ideal world, another recommendation would be to subsidise vegetable farmers and assist them in setting up quality working operations, just as Nestle have done with 40 dairy famers in Harrismith, South Africa (Oberholster, 2013:176). If andBeyond Ngala could start getting a large percentage of reliable local produce from neighbouring communities, this would be ideal. andBeyond have already begun exploring this option in communities surrounding some of their other lodges. Small business development is real empowerment. Porter and Kramer (2011:5) suggest that shared value is not about sharing value that has already been created; rather, it is about expanding on the pool of economic and social value. By utilising local farmers, this would maximise the returns to these communities because they can rely on other avenues and not only on guest donations. According to Porter *et al.* (2011:4), CSV is not social responsibility, philanthropy, or even sustainability, but a new way of achieving economic success. The need to incentivise local stakeholders to assist them with a business setup and guidance is important. andBeyond might be a primary income generator in some local businesses, but secondary business is important too. The lower the communities' reliance on only andBeyond Ngala, the better. Realistically, the reserve can only employ so many people and the lodges can only generate a certain amount of turnover. Spenceley (2001:156) stated that one lodge couldn't answer all the development needs of such a large community. The residents of Welverdiend must also play their part. Should it ever happen that the lease on the andBeyond Ngala Private Game Reserve is not renewed for some reason, the knowledge that these communities would be able to continue without a huge reliance on andBeyond is vital.

Measuring shared value is difficult. Within Welverdiend and Hluvukani, some other ideas to determine the actual impact that andBeyond has had could be measuring the distance that residents have to walk to schools, clinics, or to collect water. It is one thing to help to build facilities, but the effectiveness of these operations also needs to be measured. Examples of this might be the pass rates of scholars, the quality of teaching, the number of patients that recover from sickness or have direct access to medication, *etc*. Could shared value also be measured by comparing what andBeyond has achieved from a reserve of 14, 691 hectares compared to

what the KNP (almost 2 million hectares) has achieved? Should a government-run institution really be the benchmark? Is the KNP currently achieving shared value? According to Porter *et al*., (2011:2), no measurement for shared value currently exists. Even 80% of andBeyond's senior management admitted that they do not have an adequate measurement in place yet (Table 11). This would require very detailed monitoring and evaluation. Only once some sort of measurement criteria is agreed upon within andBeyond and the Africa Foundation, could one then try to determine the link that this has to the company's financial performance. This aspect becomes extremely technical with so many different factors that it is hard to make a causal link.

Porter *et al*., (2011:4) suggested that a four-step process to measure shared value should be followed. The results suggest that andBeyond together with the Africa Foundation are halfway through this process, as they have already progressed through two of these steps. They have successfully identified the social issues to target, through their detailed consultation process with the communities, and have made a business case, as community development is part of their daily operations. andBeyond/Africa Foundation still require a more effective way to track progress and to measure results. This will allow them to use these insights to unlock new value. This type of research might be the start of similar measurement criteria in the future.

Lastly, as Kvistgaard (2013:18) showed, many companies use false CSR marketing to mask their lack of contribution towards society. This research suggests that this is not the case. Successful eco-tourism results in quality community development. andBeyond are under-marketing their contribution to local communities yet strongly deliver on CSR initiatives. This is unfortunate and should be addressed as soon as possible using measurable indicators. It was clear that both the local communities and the guests of andBeyond could be better informed about what has been achieved.

7.4   SUGGESTIONS FOR FUTURE RESEARCH

This case study showed that the strategies adopted by the private wildlife sector can be measured in terms of shared value, using quite simple qualitative and quantitative surveys. In the case of andBeyond, these practices created positive shared value. However, this research would have been much stronger if a community that has not been impacted positively by eco-tourism had been included as a control or counter-factual case.

A central premise of eco-tourism is a claim that it benefits communities. This research showed that these claims can be measured. One of the suggestions from this research is that further work needs to be conducted to improve on the preliminary variables that were developed for this study. In addition, these variables need to be mainstreamed into eco-tourism operations as a set of measurable standards to improve the performance of such operations relative to communities. The use of agreed metrics and standards could strengthen the legitimacy of the eco-tourism sector, driving further improvements in performance through transparency and peer pressure. There is also scope to apply these indicators across industry, for example in the mining industry, which is notorious for being more damaging on the environment than others.

In conclusion, this research shows that the concept of shared value is viable and measurable. Preliminary methods for measuring indicators of shared value were produced in this research, and others are encouraged to improve on these, including through the use of counterfactual cases.

REFERENCES

Africa Foundation. 2016. [Online]. Available: http://africafoundation.org.za.html [2016, October 15].

andBeyond. 2011. andBeyond's Groundbreaking Phinda Land Deal with Communities Media Release. Johannesburg: andBeyond.

andBeyond. 2016. [Online]. Available: http://www.andbeyond.com.html [2016, October 20].

andBeyond. 2016. Ngala Orientation Folder. Lodge Marketing Collateral.

andBeyond. 2016. andBeyond Financials 2015/16. Johannesburg: andBeyond.

andBeyond/Butchart, D. 2015. Ngala Eco Guide, Naturalist Notes. Lodge Marketing Collateral.

Baker, T. L. 1994. *Doing Social Research*. 2nd ed. Singapore: McGraw-Hill, Inc.

Baral, N., Stern, M., & Bhattarai, R. 2008. Contingent valuation of eco-tourism in Annapurna conservation area, Nepal: Implications for sustainable park finance and local development. *Journal of Ecological Economics*, 6(6): 218–227.

Beinhocker, E. D. 2006. *The Origin of Wealth: Evolution, complexity, and the radical remaking of economics*. Boston: Harvard Business School Press.

Beschorner, T. 2013. Creating Shared Value: The One-Trick Pony Approach. *Business Ethics Journal Review*, 1(17): 106–112.

Biswas, A. K. & Biswas-Tortajada, A. L. 2014. Creating Shared Value. How Nestle succeeded in Indian City of Moga.

124

Biswas, A. K. Biswas-Tortajada, C. T. A., Joshi, Y. K. & Gupta, A. 2014. *Creating Shared Value: Impacts of Nestlé in Moga*, India. Springer

Blom, A. 2010. The monetary impact of tourism on protected area management and the local economy in Dzanga-Sangha. *Journal of Sustainable Tourism*, 8(3): 175 – 189.

Bookbinder, R. M., Dinerstein, E., Rijal, A., Cauley, H., & Rajouria, A. 1998. Eco-tourism's support of biodiversity. *Journal of Conservation Biology*, 12(6): 1399–1404.

Buckley, R. C. & Sommer, M. 2001. *Tourism and Protected Areas. Partnerships and Principle in Practise Report. CRC for Sustainable Tourism*. Australia

Buchanan, M. 1999. *The Return: The Story of Phinda Game Reserve*. Hazyview: Londolozi Publishers CC.

Carlisle, L. 2014. Group Conservation Manager: andBeyond. Personal Telephonic Interview: 15 April, Orpen, Kruger National Park, SA.

Carroll, A. B. 1991. The Pyramid of Corporate Social Responsibility: Toward the Moral Management of Organizational Stakeholders. *Business Horizons*, 34(4): 39-48.

Carroll, A. B. 1999. Corporate Social Responsibility: Evolution of a Definitional Construct. *Business and Society*, 38(3): 268-295.

Carroll, A. B. & Shabanna, K. M. 2010. The Business Case for Corporate Social Responsibility: A Review of Concepts, Research and Practice. *International Journal of Management Reviews*, 12(1): 85-105.

CCAfrica. *Simply Safari* [Brochure]. Johannesburg: Benmore.

Connelly, J., Smith, G., Benson, D. & Saunders, C. 2012. *Environmental movements, in Politics and the Environment: From theory to practice*. 3rd ed. London: Routledge. 94-135.

Crane, A., Palazzo, G., Spence, L. J., & Matten, D. 2014. Contesting the Value of "Creating Shared Value". *California Management Review*, 56(2): 130-153.

Currie, J. A. 2001. *Towards Sustainable Conservation: Community perceptions of game reserves in the Maputaland region of South Africa*. (Unpublished Masters dissertation). London: Middlesex University.

Davis, K. 1960. Can Business Afford to Ignore its Social Responsibilities? *California Management Review*, 2(3): 70-76.

Davis, K. 1973. The Case for and against Business Assumptions of Social Responsibilities. *The Academy of Management Journal*, 16(2): 312-322.

Davis, K. 1975. Five Propositions for Social Responsibility. *Business Horizons*, 18(3): 19-24.

Davis, K. & Blomstrom, R. L. 1971. *Business, Society and Environment: Social Power and Social Response*, 2nd ed. New York: McGraw-Hill.

de Beer, E. 2000. People Participation – a challenge to protected area management – the Peru experience. *Unisa Latin America Report*, 16(1): 4-15.

Deguignet M., Ju e-Bignoli D., Harrison J., MacSharry B., Burgess N. & Kingston N. 2014. *2014 United Nations List of Protected Areas*. UNEP-WCMC: Cambridge, UK.

Dharmaratne, G. S., Sang, F. Y. & Walling, L. J. 2000. Tourism potentials for financing protected areas. *Annals of Tourism Research*, 27 (3): 590-610.

Drucker, P. F. 1973. *Management: Tasks, Responsibilities, Practices*. New York: Harper & Row, Publishers, Inc.

Friedman, M. 1962. *Capitalism and Freedom*. Chicago, IL: University of Chicago Press.

Griseri, P. & Seppala, N. 2010. *Business Ethics and Corporate Social Responsibility*. Singapore: South-Western Cengage Learning.

Hendry, J. R. A. 2002. Conservation Attitudes of People Surrounding the Greater Kruger National Parl. *Conservation Corporation Africa: Ecological Journal*, (4): 92-99.

Hills, G., Russell, P., Borgonovi, V., Doty, A. & Iyer, L. 2012. *Shared Value in Emerging Markets: How Multinational Corporations Are Redefining Business Strategies to Reach Poor or Vulnerable Populations*. FSG Report.

Khan, F. (ed.). 2002. The Roots of Environmental Racism and the Rise of Environmental Justice in the 1990s, in *Environmental Justice in South Africa*. Cape Town: University of Cape Town Press. 15-48.

Khoza, D., Nyathi, D. & Roche, C. 2002. A Recent Social and Cultural History of Ngala – Part 1. *Conservation Corporation Africa: Ecological Journal*, (4): 100 – 105.

Khoza, L. 2014. Africa Foundation Mpumalanga Regional Manager. Personal Interview. 10 April, Welverdiend Community, Mpumalanga, SA.

Kvistgaard, L. T. 2013. *Creating Shared Value: A post-positivistic analysis of Michael E. Porter's meta-theoretical eclecticism*. (Unpublished Masters dissertation). Copenhagen: Copenhagen Business School.

Leedy, P. D. 1993. *Practical Research: Planning and Design*. 5th ed. New York: Macmillan Publishing Company.

Margolis. J. D. & Walsh, J. P. 2003. Misery Loves Companies: Rethinking Social Initiatives by Business. *Administrative Science Quarterly*, 48(2): 268-305.

Micklethwait, J. & Wooldridge, A. 1997. *The Witch Doctors: What the management gurus are saying, why it matters and how to make sense of it*. London: Mandarin Paperbacks.

Moran, D. 1994. Contingent valuation and biodiversity: measuring the user surplus of Kenyan protected areas. *Biodiversity and Conservation*, 3(1): 663–684.

Muller, K. 2009. Environmental Governance in South Africa, in HA Strydom & ND King. *Environmental Management in South Africa*. 2nd ed. Cape Town: Juta, 68-96.

Murphree, M. W. 2009. The strategic pillars of communal natural resource management: benefit, empowerment and conservation. *Biodiversity and Conservation*, 18(1): 2551-2562.

Ngala Private Game Reserve. 2013. *November 2013 Bi-annual Environmental Audit Report*. Limpopo: Kruger National Park.

Oberholster, T. 2013. Creating shared value, in Thwaits, C. & Bouwer, C. (eds.). *Behind the Green Vail: Reflections on Sustainability*. Pretoria: Media in Africa. 174-177.

Peterson, R. T. & Jun, M. 2009. Perceptions of Social Responsibility: The Entrepreneurial Vision. *Business & Society*, 48(3): 385-405.

Pfitzer, M., Bockstette, V. & Stamp, M. 2013. Innovating for Shared Value: Companies that deliver both social benefit and business value rely on five mutually reinforcing elements. *Harvard Business Review*, 3-9.

Pimbert, M. P. & Pretty, J. N. 1995. *Parks, People and Professionals: Putting "participation" into Protected Area Management*. United Nations Research Institute for Social Development Discussion Paper 57, Geneva, Switzerland: UNRISD.

Porter, M. E. & Kramer, M. R. 2011. Creating Shared Value: How to reinvent capitalism – and unleash a wave of innovation and growth. *Harvard Business Review*, 89 (1/2) 62-77.

Porter, M. E., Hills, G., Pfitzer, M., Patscheke, S. & Hawkins, E. 2011. *Measuring Shared Value: How to Unlock Value by Linking Social and Business Results*. FSG Report.

Reich, R. B. 1998. The New Meaning of Corporate Social Responsibility. *California Management Review*, 40(2): 8-17.

Republic of South Africa. 1994. Government Gazette 11 March 1994. Appendix 11: Proclamation of Contractual National Park.

Russouw, N. & Wiseman, K. 2004. Learning from the implementation of environmental public policy instruments after the first 10 years of democracy in South Africa. *South Africa*, 22(2): 131-140.

Saayman, A. & Saayman, M. 2009. Socio-demographic and behavioural determinants of visitors spending at the Kruger National Park in South Africa. *The South African Journal of Economic and Management Sciences*, 12(4): 493-512.

Salafsky, N. & Wollenburg, E. 2000. Linking Livelihoods and Conservation: A Conceptual Framework and Scale for Assessing the Integration of Human Needs and Biodiversity. *World Development*, 28(8): 1421-1438.

SANParks. 2008a. *SANParks: Economic Impact Assessment*. SANParks, Skukuza.

SANParks. 2008b. *Kruger National Park Management Plan*. SANParks, Skukuza.

SANParks. 2012. *SANParks: Report on Social Investment Programmes*. SANParks, Skukuza.

SANParks. 2014a. *South African National Parks Annual Performance Plan for 2014/15*. SANParks, Skukuza.

SANParks. 2014b. *South African National Parks Annual Report 2013/14*. SANParks, Skukuza.

SANParks. 2014c. *South African National Parks Strategic Plan for the Fiscal 2014/15 – 2018/19*. SANParks, Skukuza.

Shoo, R. A. & Songorwa, A. N. 2013. Contribution of eco-tourism to nature conservation and improvement of livelihoods around Amani nature reserve, Tanzania. *Journal of Ecotourism*, 12(2): 75-89.

Siegruhn, R. 2002. *Shared values the road to reconstruction and success*. (Unpublished masters dissertation). Cape Town: University of Stellenbosch.

Smith, N. C. 2003. Corporate Social Responsibility: Whether or How? *California Management Review,* 45(4): 52-76.

Smith, V. & Langford, P. 2011. Responsible or redundant? Engaging the workforce through corporate social responsibility. *Australian Journal of Management*, 36(3); 425-447.

Sowry, R. 2014. Section Ranger, Kingfisherspruit, Kruger National Park. Personal Interview: 10 February, Orpen, Kruger National Park, SA.

Spenceley, A. 2001. Sustainable Nature-based Tourism Assessment: Ngala Private Game Reserve. Unpublished Confidential Report.

Spenceley, A. 2006. Ecotourism: Benefits for conservation and local people. *African Wildlife*, 60 (3): 16-18.

Statistics South Africa. 2016a. *Community Survey 2016*. Statistics South Africa, Pretoria.

Statistics South Africa. 2016b. *Quarterly Labour Force Survey, Quarter 2*. Statistics South Africa, Pretoria.

Stronza, A. & Gordillo, J. 2008. Community views on ecotourism. *Annals of Tourism Research*, 35 (2): 448-468.

The International Ecotourism Society (TIES) 2015. [Online]. Available: https://www.ecotourism.org/what-is-ecotourism.html [2016, July 10].

United Nations, Department of Economic and Social Affairs, Population Division. 2015. *World Population Prospects: The 2015 Revision, Key Findings and Advance Tables*. Working Paper No. ESA/P/WP.241.

Vogel, D. J. 2005. Is there a Market for Virtue? The Business Case for Corporate Social Responsibility. *California Management Review*, 47(4): 19-45.

Weber, M. 2008. The Business Case for Corporate Social Responsibility: A Company-level Measurement Approach for CSR. *European Management Journal*, 26 (4): 247– 261.

Yin, R. K. (ed.). 2003. *Case Study Research: Design and Methods*. 3rd ed. California: Sage Publications, Inc.

Zikmund, W. G. 2002. *Business Research Methods*. 7th Ed. Ohio: South-Western, Thomson Learning.

APPENDIX A – INTERVIEW GUIDELINE 1

Senior Manager Interview

Name:

Job Function:

What are your thoughts on Corporate Social Responsibility and what are andBeyond Ngala/Africa Foundation looking to get out of it?

What is your understanding of Creating Shared Value?

What value do you think andBeyond Ngala/Africa Foundation are creating within Weldverdiend and Hluvukani?

What are the main positive social impacts (financial or non-financial benefits) that have resulted from the relationship between andBeyond Ngala/Africa Foundation and Welverdiend or Hluvukani? If any?

Checklist/Prompts
Employment
Healthcare
Education
Sanitation
Infrastructure
Small Business
Environment
Housing
Social Support
Less Absenteeism

132

Employee Satisfaction/Pride
More Educated Staff
Less poaching
Good for andBeyond brand, attracts more guests
Reduction in costs?

Are there any financial costs that have resulted from the relationship between andBeyond Ngala/Africa Foundation and Welverdiend or Hluvukani? If so, what are the components?

Try and get components of costs – e.g. donations, material, salaries

Are there any non-financial costs that have resulted from the relationship between andBeyond Ngala/Africa Foundation and Welverdiend or Hluvukani?

Checklist/Prompts
Time away from work (e.g. handovers)
Stress for managers
Raised expectations that weren't met - i.e. any unintended consequences
Staff backlash saying it's not part of their job

Would you say the benefits outweigh the costs or the other way around? Please give some reasons

133

Do you have any suggestions on how to improve the relationship between andBeyond Ngala/Africa Foundation and Welverdiend or Hluvukani?

To what extent do communities have access to relevant information and influence the decision making within andBeyond Ngala/Africa Foundation?

Does andBeyond/Africa Foundation have a measurement for shared value?

How do you see the future of this shared value initiative?

Any additional comments

APPENDIX B – INTERVIEW GUIDELINE 2

Guest Interview

Are you familiar with some of the work andBeyond Ngala does in the local communities? Y/N

If yes, where did you find out about this?
Don't prompt for the ranger – wait and see what they say.

What aspects of the work have you heard about? Do you see any positives or negatives about this work?

Have you experienced that other places that you have been on vacation to are doing similar work? If so, tell me a bit about it.

Would this have been a major reason why you have selected to travel with andBeyond or would this encourage you to book again with andBeyond in the future?

What is your overall impression with how andBeyond contributes towards local communities and conservation initiatives?

APPENDIX C – INTERVIEW GUIDELINE 3

Employee Community Interview

Community: …………………………   Date: …………/ 2016

My name is Andrew Nicholson and I am a student at the University of Stellenbosch. I am studying the relationship between andBeyond Ngala/Africa Foundation and your community. I want to see if this partnership is working well or not so well and would therefore like to ask you a few questions. You don't need to answer my questions if you don't want to but your answers might help to improve this relationship. I will not ask for your name or age so you can answer the questions honestly without any worry or ramifications.

Do you know about the relationship between andBeyond Ngala/Africa Foundation and your community? Y/N

What do you think about it? Why?

Do you think life is better for you because of andBeyond/Africa Foundation?

What is the best thing andBeyond Ngala/Africa Foundation does for your community?

Are there any problems with the relationship?

Do you have any ideas for how andBeyond Ngala/Africa Foundation can work better for your community?

	☺☺	☺	😐	☹	☹☹	
andBeyond Ngala / Africa Foundation does a lot for us	☺☺	☺	😐	☹	☹☹	andBeyond Ngala / Africa Foundation does nothing for us
Wildlife is important to us	☺☺	☺	😐	☹	☹☹	Wildlife is very problematic to us
andBeyond Ngala / Africa Foundation have helped build good education facilities	☺☺	☺	😐	☹	☹☹	andBeyond Ngala / Africa Foundation haven't built any education facilities
Employment by andBeyond Ngala is what we expected	☺☺	☺	😐	☹	☹☹	Employment by andBeyond Ngala is much less than we expected
The government do more in our community because of andBeyond	☺☺	☺	😐	☹	☹☹	The government do less in our community because of andBeyond
People poach less than before	☺☺	☺	😐	☹	☹☹	People poach more than before
Our relationship with andBeyond Ngala is excellent	☺☺	☺	😐	☹	☹☹	Our relationship with andBeyond Ngala is very bad
Money raised for the community is used in the best possible way	☺☺	☺	😐	☹	☹☹	Money raised for the community is wasted or stolen
andBeyond Ngala/Africa Foundation listen to our needs	☺☺	☺	😐	☹	☹☹	andBeyond Ngala/Africa Foundation don't listen to us
Businesses in our community employ a lot of people	☺☺	☺	😐	☹	☹☹	Businesses in our community don't employ a lot of people
We think tourism has many benefits and should be encouraged	☺☺	☺	😐	☹	☹☹	We don't think tourism has many benefits and should not be encouraged
I know somebody who has received a study bursary from Africa Foundation	☺☺	☺	😐	☹	☹☹	I don't know anybody who has received a bursary from Africa Foundation
We are highly satisfied with the number of Africa Foundation projects	☺☺	☺	😐	☹	☹☹	We are very dissatisfied with lack of Africa Foundation projects
andBeyond involve us in making decisions on community projects	☺☺	☺	😐	☹	☹☹	andBeyond don't involve us in making decisions on community projects
andBeyond work carefully with our community to help us	☺☺	☺	😐	☹	☹☹	andBeyond don't work carefully with our community
Many people in our community have benefited because of andBeyond Ngala	☺☺	☺	😐	☹	☹☹	Very few people have benefited in our community because of andBeyond
The healthcare in our community has improved because of andBeyond Ngala	☺☺	☺	😐	☹	☹☹	The healthcare in our community has not improved
andBeyond staff need to spend more time interacting with the community	☺☺	☺	😐	☹	☹☹	andBeyond staff don't need to spend more time interacting with the communities
Community leaders are honest and work hard for us	☺☺	☺	😐	☹	☹☹	Community leaders are dishonest and don't work hard for us
I am proud to work for andBeyond	☺☺	☺	😐	☹	☹☹	I am not proud to work for andBeyond

APPENDIX D

☺☺ - Ni tsake ngopfu swinene

☺ - Ni tsakile

😐 - A ni switivi

☹ - Ni kwatile

☹☹ - Ni kwatile ngopfu swinene

138

APPENDIX E – INTERVIEW GUIDELINE 4

Non-employee Community Interview

Community: …………………………   Job: ………………………………   Date: …………/ 2016

My name is Andrew Nicholson and I am a student at the University of Stellenbosch. I am studying the relationship between andBeyond Ngala/Africa Foundation and your community. I want to see if this partnership is working well or not so well and would therefore like to ask you a few questions. You don't need to answer my questions if you don't want to but your answers might help to improve this relationship. I will not ask for your name or age so you can answer the questions honestly without any worry or ramifications.

Do you know about the relationship between andBeyond Ngala/Africa Foundation and your community? Y/N

What do you think about it? Why?

Do you think life is better for you because of andBeyond/Africa Foundation?

What is the best thing andBeyond Ngala/Africa Foundation does for your community?

Are there any problems with the relationship?

Do you have any ideas for how andBeyond Ngala/Africa Foundation can work better for your community?

	☺☺	☺	😐	☹	☹☹	
andBeyond Ngala / Africa Foundation does a lot for us	☺☺	☺	😐	☹	☹☹	andBeyond Ngala / Africa Foundation does nothing for us
Wildlife is important to us	☺☺	☺	😐	☹	☹☹	Wildlife is very problematic to us
andBeyond Ngala / Africa Foundation have helped build good education facilities	☺☺	☺	😐	☹	☹☹	andBeyond Ngala / Africa Foundation haven't built any education facilities
Employment by andBeyond Ngala is what we expected	☺☺	☺	😐	☹	☹☹	Employment by andBeyond Ngala is much less than we expected
The government do more in our community because of andBeyond	☺☺	☺	😐	☹	☹☹	The government do less in our community because of andBeyond
People poach less than before	☺☺	☺	😐	☹	☹☹	People poach more than before
Our relationship with andBeyond Ngala is excellent	☺☺	☺	😐	☹	☹☹	Our relationship with andBeyond Ngala is very bad
Money raised for the community is used in the best possible way	☺☺	☺	😐	☹	☹☹	Money raised for the community is wasted or stolen
andBeyond Ngala/Africa Foundation listen to our needs	☺☺	☺	😐	☹	☹☹	andBeyond Ngala/Africa Foundation don't listen to us
Businesses in our community employ a lot of people	☺☺	☺	😐	☹	☹☹	Businesses in our community don't employ a lot of people
We think tourism has many benefits and should be encouraged	☺☺	☺	😐	☹	☹☹	We don't think tourism has many benefits and should not be encouraged
I know somebody who has received a study bursary from Africa Foundation	☺☺	☺	😐	☹	☹☹	I don't know anybody who has received a bursary from Africa Foundation
We are highly satisfied with the number of Africa Foundation projects	☺☺	☺	😐	☹	☹☹	We are very dissatisfied with lack of Africa Foundation projects
andBeyond involve us in making decisions on community projects	☺☺	☺	😐	☹	☹☹	andBeyond don't involve us in making decisions on community projects
andBeyond work carefully with our community to help us	☺☺	☺	😐	☹	☹☹	andBeyond don't work carefully with our community
Many people in our community have benefited because of andBeyond Ngala	☺☺	☺	😐	☹	☹☹	Very few people have benefited in our community because of andBeyond
The healthcare in our community has improved because of andBeyond Ngala	☺☺	☺	😐	☹	☹☹	The healthcare in our community has not improved
andBeyond staff need to spend more time interacting with the community	☺☺	☺	😐	☹	☹☹	andBeyond staff don't need to spend more time interacting with the communities
Community leaders are honest and work hard for us	☺☺	☺	😐	☹	☹☹	Community leaders are dishonest and don't work hard for us

APPENDIX F

STELLENBOSCH UNIVERSITY
CONSENT TO PARTICIPATE IN RESEARCH

Creating Shared Value: an exploratory case study, assessing the shared value a company is creating through a protected area and its unique partnership with local communities.

You are asked to participate in a research study conducted by Andrew Nicholson, from the School of Public Leadership at Stellenbosch University. The results will contribute my Masters of Philosophy in Environmental Management. You were selected as a possible participant in this study because you are employed by either andBeyond or the Africa Foundation.

PURPOSE OF THE STUDY

The purpose of this research is to identify what effects the property has on the local community and whether there is a match or mismatch between the perceived value created by senior management of the reserve and the actual value the community understand they receive in the form of benefits. Ideally, this would result in a common shared value.

PROCEDURES

If you volunteer to participate in this study, we would ask you to please simply compete this once-off interview. It shouldn't take longer than 20 minutes.

POTENTIAL BENEFITS TO SUBJECTS AND/OR TO SOCIETY

To explore the relationship between andBeyond Ngala Private Game Reserve and two neighbouring communities, Welverdiend and Hluvukani, in an attempt better understand shared value within the eco-tourism industry in SA. This may ultimately answer the question: "What values is this partnership creating?" Recommendations will be provided from the results of this research.

PAYMENT FOR PARTICIPATION

Unfortunately no payment will be received for participation.

CONFIDENTIALITY

Any information that is obtained in connection with this study and that can be identified with you will remain confidential and will be disclosed only with your permission or as required by law. Confidentiality will be maintained by means of an anonymous interview. Data will be stored in a safe place and locked away. Only the primary investigator and his immediate supervisor will have access to this information.

141

Results will be published in the thesis and you may be referred to as a manager/management in the text.

PARTICIPATION AND WITHDRAWAL

You can choose whether to be in this study or not. If you volunteer to be in this study, you may withdraw at any time without consequences of any kind. You may also refuse to answer any questions you don't want to answer and still remain in the study. The investigator may withdraw you from this research if circumstances arise which warrant doing so.

IDENTIFICATION OF INVESTIGATORS

If you have any questions or concerns about the research, please feel free to contact the principle investigator, Andrew Nicholson (082 822 0869) or alternatively, his supervisor, Brian Child (079 539 1696).

RIGHTS OF RESEARCH SUBJECTS

You may withdraw your consent at any time and discontinue participation without penalty. You are not waiving any legal claims, rights or remedies because of your participation in this research study. If you have questions regarding your rights as a research subject, contact Ms Maléne Fouché [mfouche@sun.ac.za; 021 808 4622] at the Division for Research Development.

SIGNATURE OF RESEARCH SUBJECT OR LEGAL REPRESENTATIVE

Andrew Nicholson described the information above to me in English and I am in command of this language. Otherwise, it was satisfactorily translated to me. I was given the opportunity to ask questions and these questions were answered to my satisfaction.

I hereby consent voluntarily to participate in this study. I have been given a copy of this form.

_____
Name of Subject/Participant

_____
Name of Legal Representative (if applicable)

_____   _____
Signature of Subject/Participant or Legal Representative   Date

SIGNATURE OF INVESTIGATOR

I declare that I explained the information given in this document to _____ [*name of the subject/participant]* and/or [his/her] representative _____ [*name of the representative]. [He*/she] was encouraged and given ample time to ask me any questions. This conversation was conducted in English.

_____   _____
Signature of Investigator   Date

APPENDIX G

Table 27: What do you think of the relationship between Ngala and your community? Why?

#	Construct	Frequency		
		Welverdiend	**Hluvukani**	**Total**
		n = 29	**n = 27**	**n = 56**
1	Good relationship	26	19	**45**
2	Helped build schools and with education	12	8	**20**
3	Creches	9	6	**15**
4	Providing water	11	2	**13**
5	Toilets	6	3	**9**
6	Bursaries	5	3	**8**
7	They do nothing for us	2	5	**7**
8	Employment	3	3	**6**
9	Clinic	4	1	**5**
10	They helped with infrastructure	5	0	**5**
11	Home based care center	5	0	**5**
12	They help us	0	4	**4**
13	Kitchens	3	0	**3**
14	Alright relationship, could be better	0	2	**2**
15	Craft center	1	0	**1**
16	Submersable water pumps	1	0	**1**
17	Compensation for animals attacking our stock	1	0	**1**
18	Hippo rollers	1	0	**1**
19	Less crime	1	0	**1**

APPENDIX H

Table 28: What is the best thing Ngala does for your community?

#	Construct	Frequency		
		Welverdiend	Hluvukani	Total
		n = 29	n = 27	n = 56
1	Building schools and helping with education	11	8	**19**
2	Bursaries	6	7	**13**
3	Providing water	4	6	**10**
4	They haven't done anything	2	6	**8**
5	Creches	3	4	**7**
6	Home based care center	3	0	**3**
7	Building things	0	3	**3**
8	Clinics	3	0	**3**
9	Bringing development to society	2	0	**2**
10	Employment	0	2	**2**
11	Toilets	1	1	**2**
12	Hippo rollers	2	0	**2**
13	Vegetable garden	1	0	**1**
14	Craft center because it is a source of income	1	0	**1**
15	Guests visiting the communiItes	1	0	**1**
16	Toys	0	1	**1**
17	Resources	0	1	**1**
18	Nature conservation awareness	0	1	**1**
19	Uniform	0	1	**1**
20	Hippo rollers	0	1	**1**
21	To protect the environment	1	0	**1**
22	The whole community has benefited	1	0	**1**

APPENDIX I

Table 29: Responses from all respondents living in both communities

	😊😊	😊	😐	☹	☹☹	
We think tourism has many benefits and should be encouraged	**56**	0	0	0	0	We don't think tourism has many benefits and should not be encouraged
Wildlife is important to us	**51**	4	0	0	1	Wildlife is very problematic to us
Ngala staff need to spend more time interacting with the community	**50**	3	0	1	2	Ngala staff don't need to spend more time interacting with the community
Our relationship with Ngala is excellent	**46**	5	2	2	1	Our relationship with Ngala is very bad
Ngala does a lot for us	**41**	8	1	1	5	Ngala does nothing for us
Ngala have helped build good education facilities	**40**	6	4	1	5	Ngala haven't built any education facilities
The healthcare in our community has improved because of Ngala	**40**	4	5	1	6	The healthcare in our community has not improved because of Ngala
Ngala work carefully with our community to help us	**37**	10	2	3	4	Ngala don't work carefully with our community
Money raised for the community is spent in the best possible way	**36**	9	7	0	4	Money raised for the community is wasted or stolen
Ngala listen to our needs	**36**	12	3	0	5	Ngala don't listen to us
I know of somebody who has received a study bursary from Ngala	**32**	5	2	2	15	I don't know of anybody who has received a study bursary from Ngala
Many people in our community have benefited because of Ngala	**31**	12	1	3	9	Very few people in our community have benefited because of Ngala
Community leaders are honest and work hard for us	**31**	10	7	2	6	Community leaders are dishonest and don't work hard for us
Ngala involve us in making decisions on community projects	**28**	10	4	3	11	Ngala don't involve us in making decisions on community projects
People poach less than before	19	6	4	2	**25**	People poach more than before
We are highly satisfied with the number of Ngala projects	**19**	13	2	10	12	We are very dissatisfied with the lack of Ngala projects
Employment by Ngala is what we expected	**18**	16	4	8	10	Employment by Ngala is less than we expected
Businesses in our community employ a lot of people	**18**	10	5	5	**18**	Businesses in our community don't employ a lot of people
The government do more in our community than they used to	14	5	**19**	6	12	The government do less in our community than they used to
I am proud to work at Ngala	**17**	1	0	0	0	I am not proud to work at Ngala