Oxalys

Make procurement **easy**

2022

South Africa Procurement Survey

Growing Procurement maturity through digitally-enabled collaboration

CIPS Chartered Institute of Procurement & Supply

SmartProcurementWorld

Summary

01 Foreword

We are delighted to present the second edition of the Oxalys South Africa Procurement Survey. This initiative provides a local overview of key procurement practices, at a time when most similar surveys are conducted at a global level. It captures the uniqueness of South Africa while highlighting emerging trends and practices.

Building on the success of the first edition, this 2022 Procurement Survey investigates new areas such as sustainable procurement and collaborative practices, which - beyond the buzzwords - we believe are decisive in positioning the country for the future.

The quality of the analyses and the relevance of the survey results stem from the diversity of the contributors, and we would like to thank once again all those who took part in this initiative, whether for its elaboration, its input or the interpretation of the data collected.

Dear readers, we hope that the results of this survey will inspire deep reflection and fruitful exchanges.

Anne-Emmanuelle Grené
Head of Oxalys South Africa

Pierre Joudiou
Chairman Oxalys

02 Procurement maturity: a key objective

The contribution of Procurement to the success of the overall strategy and to the performance of the organization is increasingly understood, measured and managed[1]. However, as important as cost reduction might be, it cannot be considered the sole mission of Procurement. Securing supplies is once again becoming a major concern and the role of Procurement in value creation is now perceived as essential. Clearly, procurement professionals' role has matured, as proven by the evolution of the missions given to them. Its expanded contributions to the performance of the organization are better defined and expected. For this increase in maturity to be effective, it is also important to develop procurement departments, as well as the skills they deploy to ensure their multiple contributions.

A growing maturity based on the development of complementary skills

Increasing the skills of procurement professionals, by identifying and recruiting more and more suitable profiles, and developing internal training, is only one ingredient in the growing maturity of the procurement function. Although necessary, it is far from sufficient. It is indeed important to develop organizational and inter-organizational skills, as well as to redefine the targeted performance itself. It is only when all these conditions are met, with the right mix of complementary ingredients, that the real rise in maturity can take place. Recruiting the best-trained procurement professionals on the market would indeed not be relevant if the organizations likely to welcome them were not ready to do so.

Defining the «right maturity»

Identifying the ingredients of an advanced procurement maturity, then putting them into practice, is undoubtedly welcome for many organizations in which the procurement function suffers from a lack of maturity compared to other functions (marketing, sales, production, R&D, etc.). To this end, they can draw on the recommendations offered by authors such as Chick and Handfield who have developed "maturity matrices". These matrices precisely describe the characteristics associated with the various levels of maturity defined and offer avenues for moving to the next level.

It is therefore important to define what the "right maturity" might be: a procurement maturity that is consistent with the maturity of the entire organization in which it operates.

03 Key figures

Key figures

85%

For nearly 85% of respondents, Procurement has **a significant impact on the performance** of the organization (Q7)

Localization and inclusivity are at the heart of Procurement strategies in 2022 (Q8)

Supply chain continuity is the top Procurement priority (Q10)

26%

Only 26% of respondents perceive **sustainable procurement as a way to improve economic performance** (Q17)

75%

of respondents consider **B-BBEE as a key driver for CSR** (Q18)

35%

of respondents think sustainable procurement is the **best way to mitigate logistics and transportation risks** (Q19)

70%

Nearly 70% of respondents use **procurement automation tools** (Q20)

76%

of respondents use **data to enable their strategic sourcing** (Q24)

Lack of embedded best practices is the main limit to the value of digital solutions (Q27)

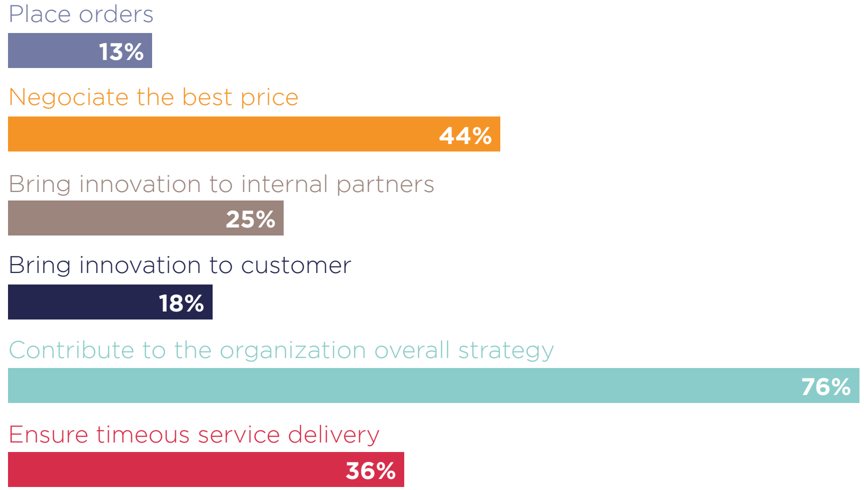
04 Procurement key challenges and priorities in 2022

Is Procurement perceived as a strategic function?

The first three responses that stand out ("contribute to the organization overall strategy", "negotiate the best price" and "ensure timely service delivery") indicate a relatively low level of procurement maturity. Indeed, apart from «place orders» which remains the least chosen, while exceeding 10% of answers, the responses that shows a higher level of maturity («bring innovation to internal partners» and "bring innovation to customers") are the least chosen.

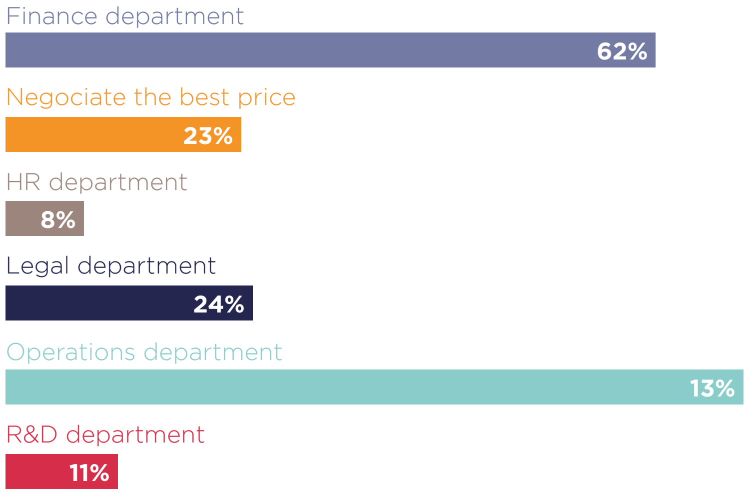
The main response given ("contribute to the organization overall strategy") suggests a high level of maturity, but this is dependent on the strategy itself. The second and third most importat roles suggest a traditional vision that remains particularly important since it concerns security of supplies and cost control. They may suggest that "contribute to the organization overall strategy" remains a classic strategy of cost leadership rather than differentiation based on innovation. A hypothesis which will be confirmed in the following questions. This already raises the question of the **«right maturity» of Procurement, a maturity adapted to the strategy of organizations and to that of the other functions which compose them, while by being able to constitute an engine of the general rise in organizational maturity.**

Figure 4: According to you, what are the two most important roles of the procurement department?



Procurement departments mostly collaborate with Operations and Finance

Figure 5: With which departments does the procurement function collaborate with the most in your organization?



Findings here confirm the low hierarchical position of the procurement department, as well as its predominantly operational nature. Procurement departments interact mostly with Operations departments rather than with Sales or R&D departments, as is the case in organizations that place Procurement and supplier relations at the heart of their business model.

The intensity of interactions with Finance may reflect a hierarchical relationship with this function, as is the case when Procurement is perceived as a support function.

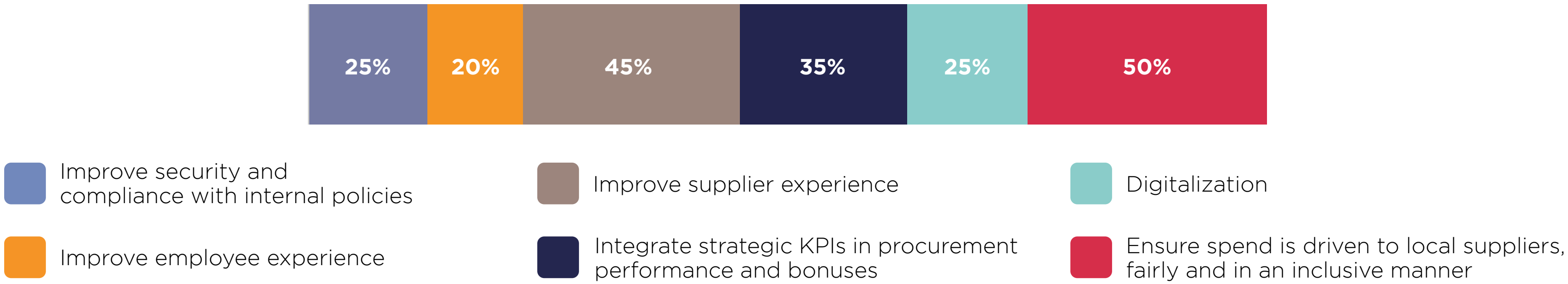
Respondents described Procurement as an impactful function, mostly aligned with the Executive agenda

Figure 6:
How would you describe the alignment of the procurement department's objectives with the Executive agenda?

Figure 7:
How would you describe Procurement's impact on the economic performance/service delivery?

Localization and inclusivity at the heart of Procurement strategies for 2022

Figure 8: Which of these strategies are deployed in your organization to deliver more strategic value from Procurement?



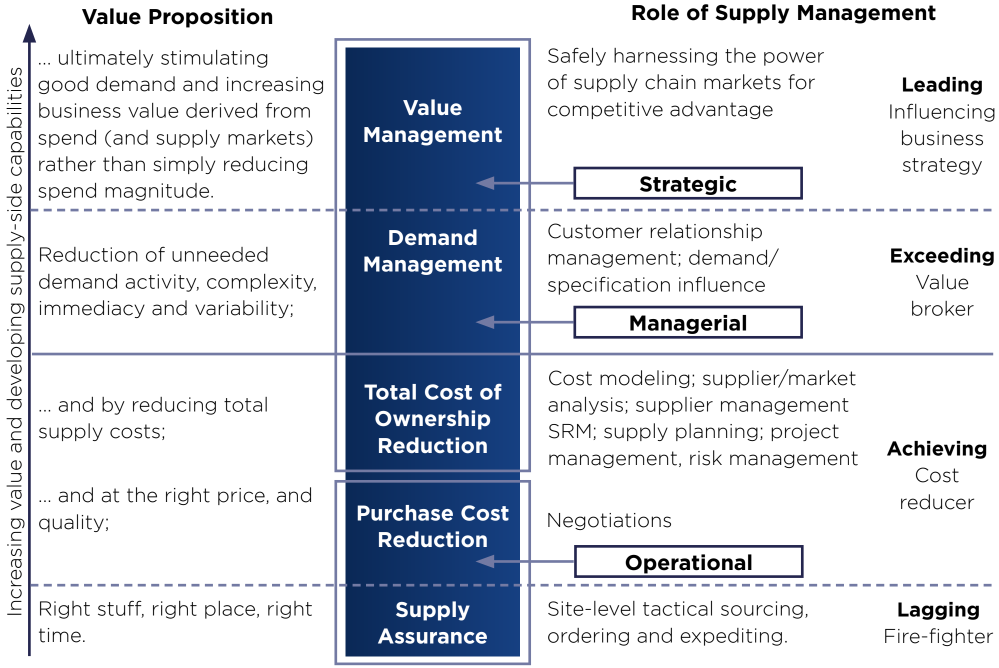
The most cited answer («ensure spend is driven to local suppliers, fairly and in an inclusive manner») demonstrates a **good understanding/acceptance of the responsibility of Procurement to the economic ecosystem in which the organization operates**. This is an essential dimension of CSR and sustainable procurement.

“Improving security and compliance with internal policies”, ranked 2nd, refers to a very operational vision of procurement.

It is also worth mentioning “Digitalization”, ranked 4th, which is also recognized as a strategic driver for Procurement.

Supply chain robustness is the most important value proposition of Procurement

Respondents highlighted "Right goods and services at the right time and right place" as the most important value proposition, which reveals the significant role of Procurement. This historical role has undoubtedly taken a new dimension following the supply difficulties that many organizations have experienced in recent years. Successive observations concerning the lesser than expected robustness of supply chains explain, at least in part, these findings. It is interesting to note that the reduction of the overall cost or TCO is mentioned much more than the reduction of procurement costs, which shows a real increase in maturity (level 3 in the matrix of Chick et Handfield[2]).



Procurement maturity ladder (Procurement's role and value proposition)

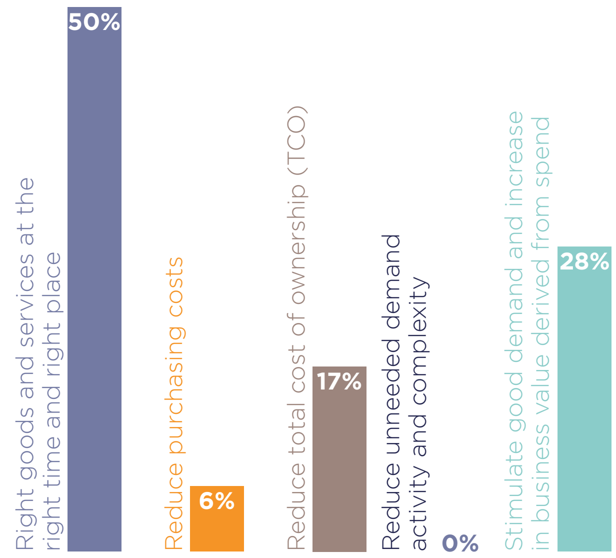
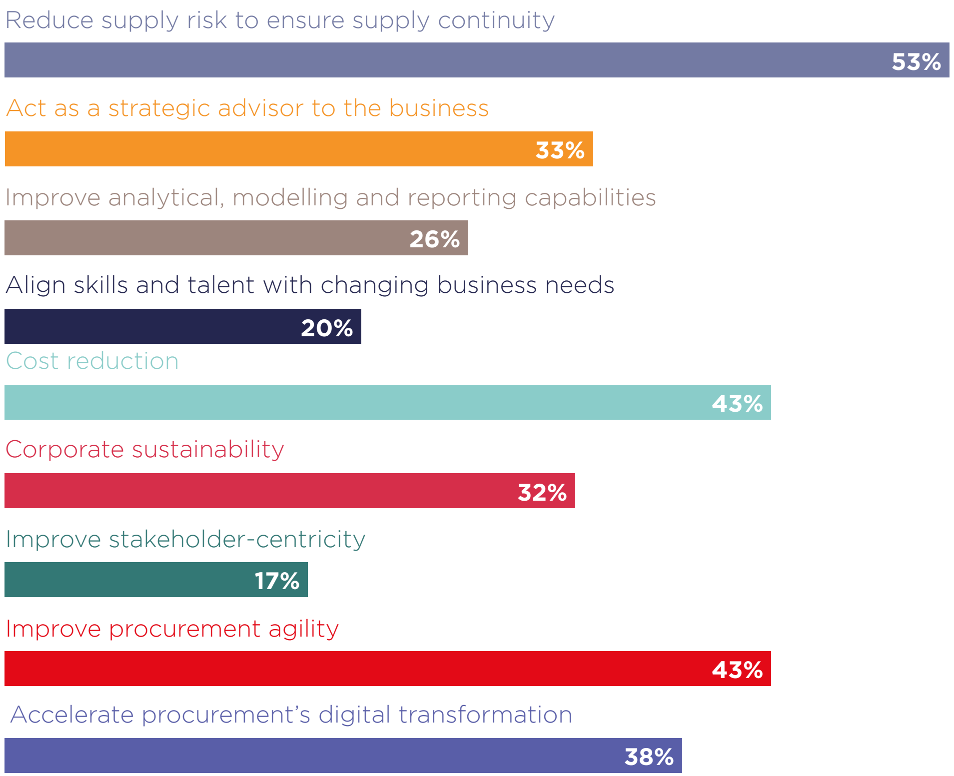


Figure 9: How would you define the most important value proposition of the procurement department for your organization?

Supply chain continuity is the top Procurement priority in 2022

Figure 10: How would you define the top procurement's priority for 2022 in your organization?



Although it was a multiple-choice question, showing a balance in the answers chosen, the findings demonstrate the increased **importance of risk management**.

"Reduce supply risks in order to ensure the continuity of supplies" is the number one priority chosen by respondents. This emphasis on risk and the need to manage it is likely to have implications for changes in procurement practices. Other studies have also showed how perceived risks and environmental uncertainty can affect the links between the quality of the customer-supplier partnership and supply chain performance.

On a par with "cost reduction", "improve procurement agility" appears as the second most important prority, showing the importance of the ability to face risks, when they materialize. The desire to accelerate digital transformation (4th position) demonstrates awareness of the importance of the topic and a real potential for progress in this area, as the following questions will show.

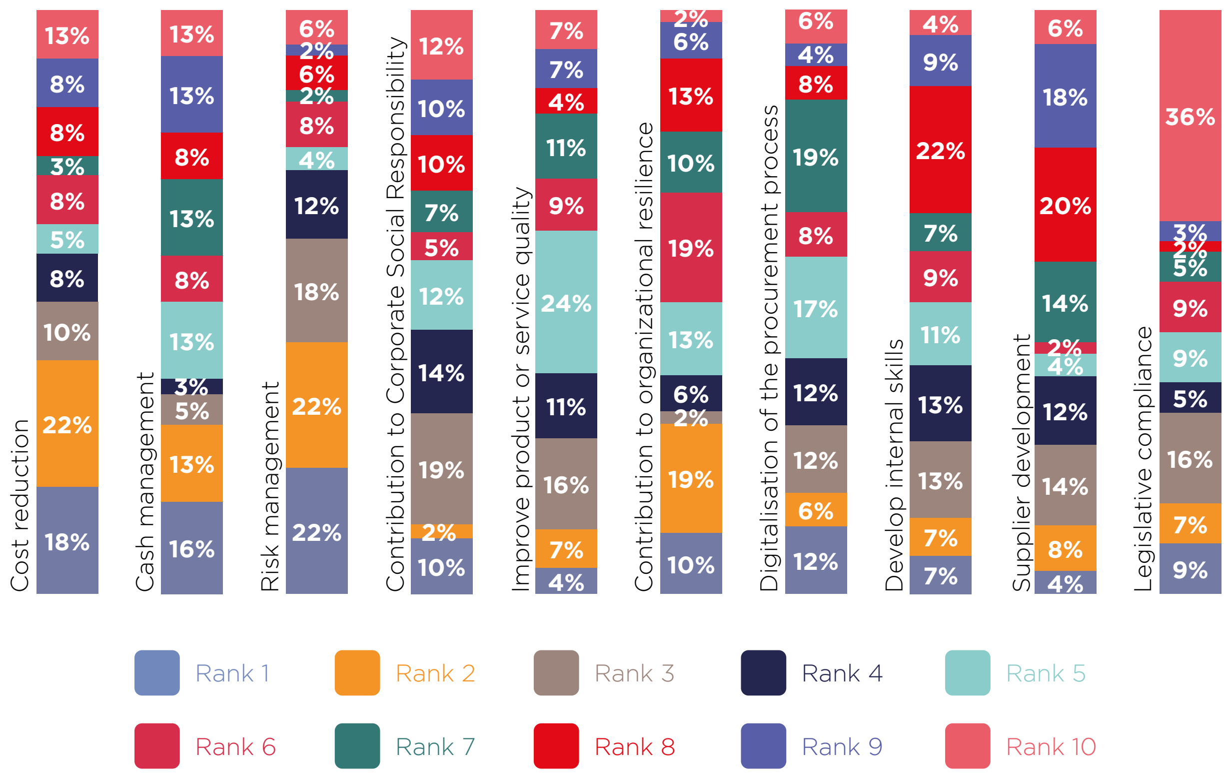
Understanding Procurement top challenges for 2022

Risk management and cost reduction are the top Procurement challenges according to respondents, perfectly in line with the previous findings.

"Contribution to organizational resilience" or "legislative compliance" are also well represented and reinforce the importance of risk management, respectively referring to organizational and legal risks.

Contributing to good cash flow ("cash management") also appears to be a major challenge. It certainly reflects the particularity of the Covid-19 pandemic crisis and the still **strong inclination to make Procurement a key lever for cash management** by extending payment terms[3]. It is also not surprising to note that small firms are more focused on this challenge of cash management (ranked 2nd in their responses).

Figure 11: What would be, according to you, the most important challenges for your procurement department in the next two years?



Call for earlier involvement in innovative projects to take Procurement to the next level

Figure 12: What do you think it will take to move to the next level?

An important question concerning the means needed to enable the procurement function to fulfill all its missions.

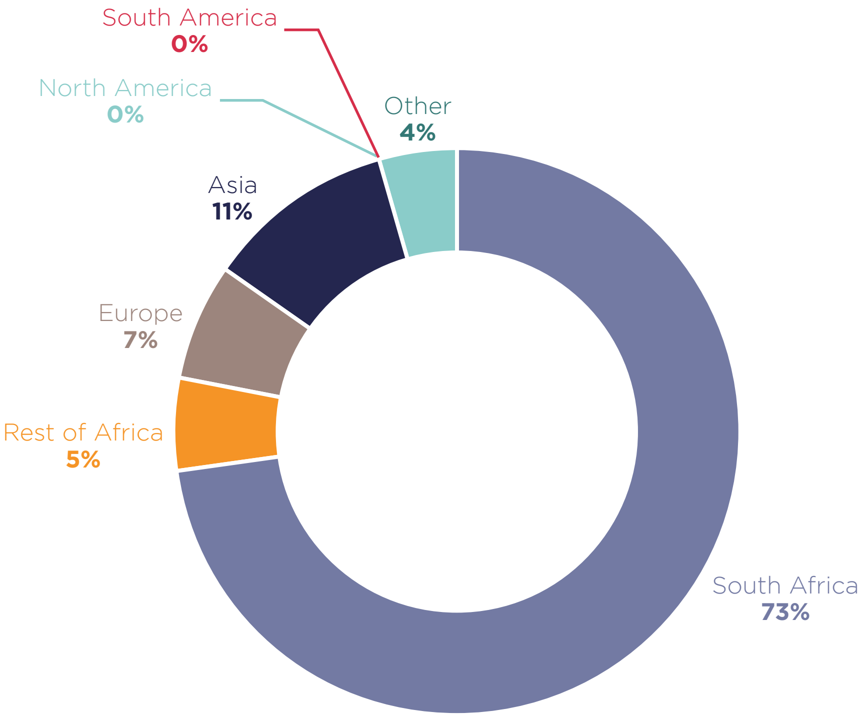
If the answers to the previous question showed a real legitimacy perceived by the respondents to contribute to the most diverse challenges, **the results here highlight a genuine need for increased recognition**.

At a time when most international studies conducted by researchers[4] or consultants[5] explain the significant role of digital solutions, the findings here seem to confirm a level of maturity that is still relatively low. It is indeed when this recognition is sufficiently present that the use of digital solutions takes on its full meaning.

05 Evolution of procurement practices and supplier relations

72% of the respondents' suppliers are South Africans

Figure 13: Where are your main suppliers located?



This year again, South African suppliers are over-represented when considering the sourcing strategy of our respondents. While a few suppliers are in Asia or Europe, none are located in America for the survey respondents.

These figures show an extremely low internationalization of sourcing for a sample of organizations of these relatively large sizes. B-BBEE regulations mainly explain this finding which demonstrate how procurement departments contribute to the overall South African economy.

Development opportunities and annual needs sharing are the best ways to attract the best suppliers

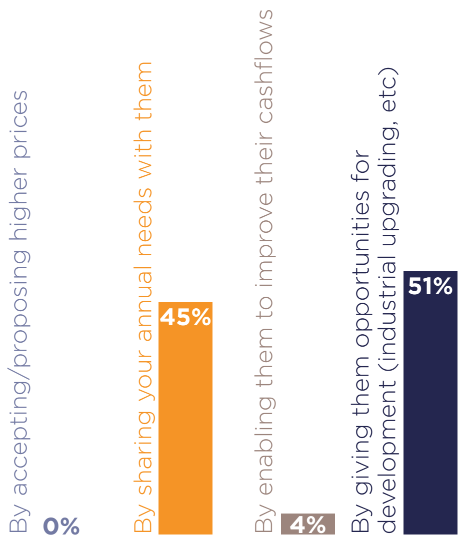


Figure 14: How do you think you could contribute to making your organization more attractive to the best suppliers?

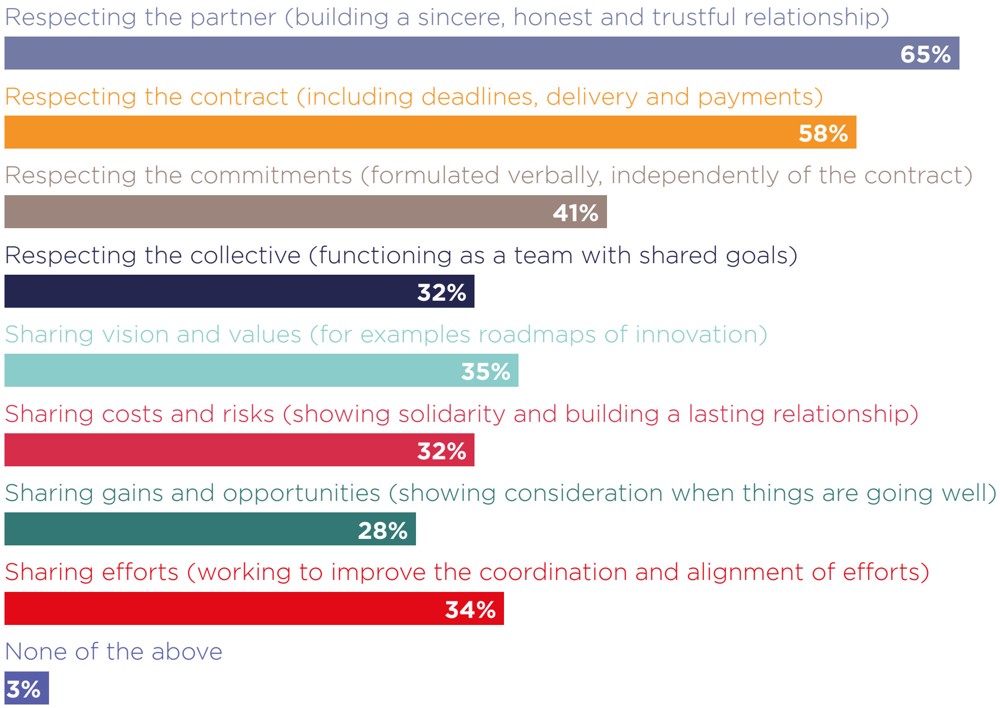
Supporting suppliers in their development, which can be done at the industrial, commercial and/or financial levels, is the most chosen option. It points out a **real ambition and an understanding of the needs and expectations of suppliers** which it would be interesting to investigate further. These findings are consistent with researches on suppliers' needs and expectations, and on the means to be implemented to become the «preferred customer» of suppliers[6].

The visibility given to suppliers, by sharing with them the annual needs, is also a widely represented, much more than pure financial considerations, largely ignored here, whether through the acceptance of higher prices or the improvement in supplier cash flow. It would be enlightening to explore the extent to which suppliers share this vision.

Towards more collaborative supplier relationships

Figure 15: How would you describe the most common type of relationship with your suppliers?

Figure 16: Which ones of the following collaborative practices have you developed with your best suppliers?



The results, expressed mainly in terms of respect (of the partner, of the contract, of the commitments, of the collective) show the stronger mobilization of the hygiene factors compared to the motivation factors[7]. These hygiene factors, which in the context of customer-supplier relations are expressed mainly in terms of respect, contribute to reducing supplier dissatisfaction. The motivation factors, rather expressed in terms of sharing (of vision and values, costs and risks, gains and opportunities, efforts), contribute, for their part, to improving supplier satisfaction.

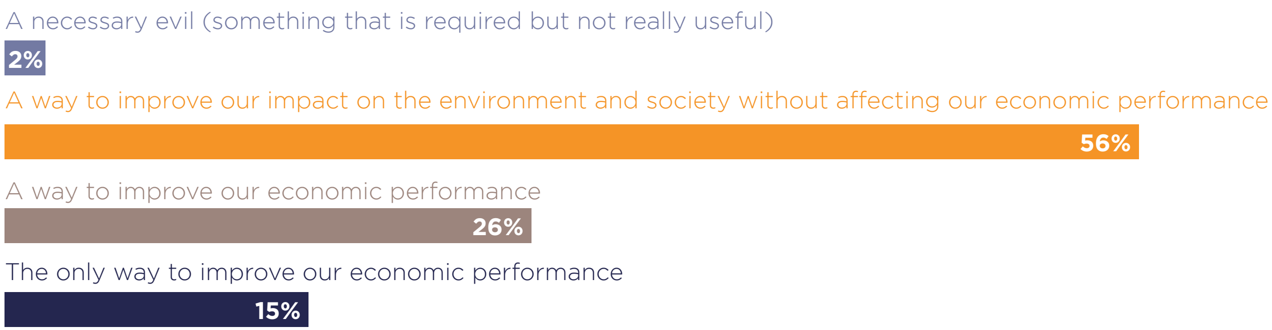
If hygiene factors appear to be more widely mobilized, motivation factors are far from being ignored, both approaches being complementary rather than substitutable. **This demonstrates a relative maturity in terms of collaborative practices.**

A mixed perception of sustainable procurement in South Africa

More than 50% of respondents consider sustainable procurement as “a way to improve -their- impact on the environment and society without affecting -their- economic performance”. In practice, such Procurement would not correspond to the definition of sustainable procurement, which clearly includes an economic dimension, in addition to the environmental and social dimensions that are well perceived by these respondents.

More than 40% of respondents believe that sustainable procurement is indeed a way to improve economic performance, including 15% of respondents who even perceive it as “the only way to improve -their- economic performance. **A real divide is therefore emerging regarding the contribution of sustainable procurement to economic performance** when less than 3% of respondents consider it only as a “necessary evil”.

Figure 17: How do you perceive sustainable procurement?



B-BBEE recognized as a key driver for CSR

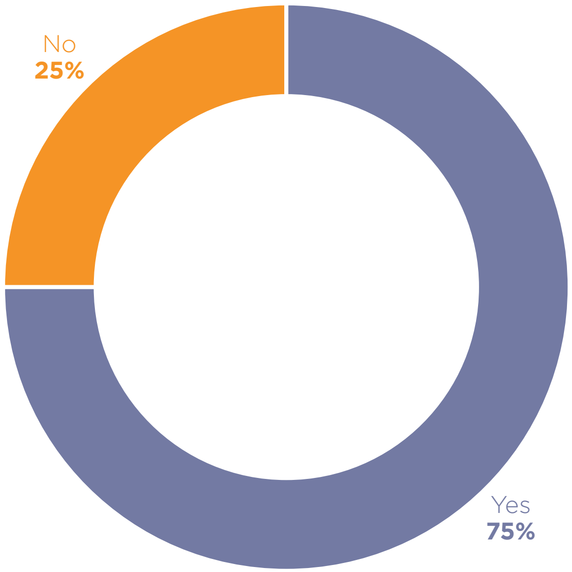


Figure 18: Would you consider B-BBEE as a driver for sustainable Corporate Social Responsibility (CSR)?

75% of respondents consider B-BBEE as a lever for progress in CSR, which shows a **real recognition of its relevance in the socio-economic transformation of the country**. Should B-BBEE be then regarded as an adapted version of CSR in the South African context, especially on its ethical and social dimensions?

Sustainable procurement is the best way to mitigate logistics and transportation risks

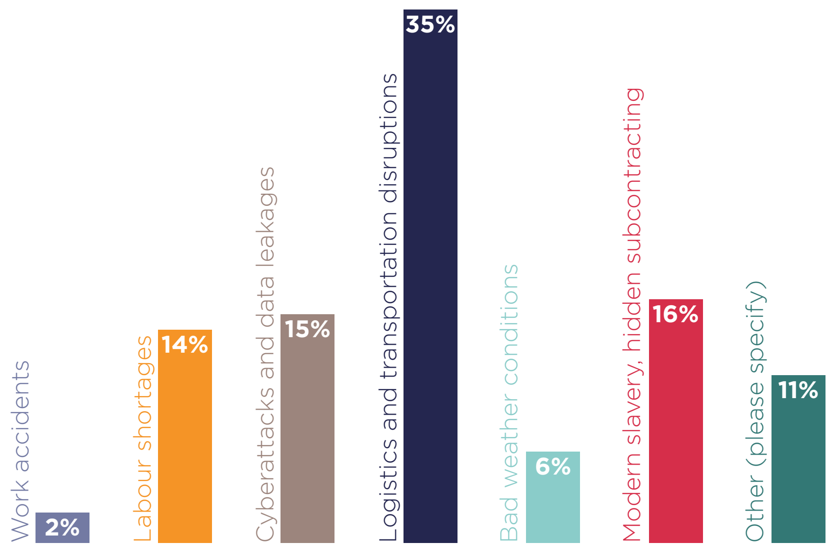
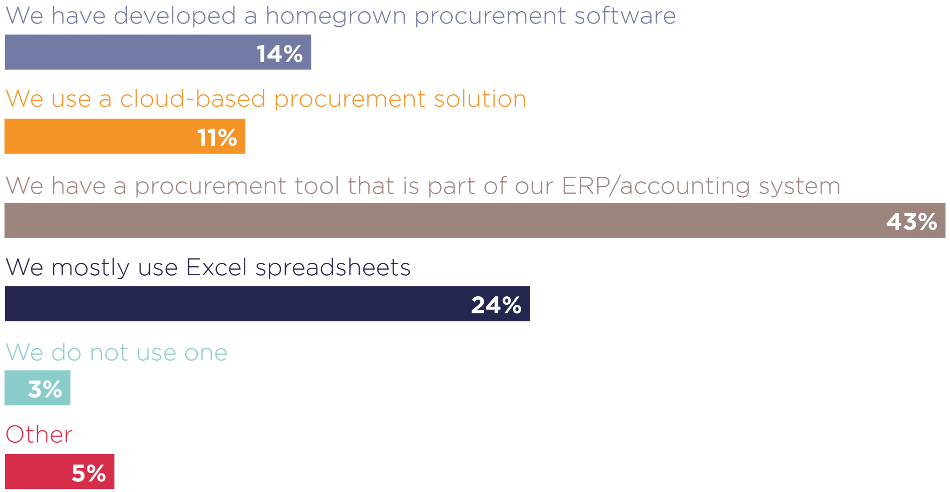


Figure 19: What are the risks you are facing, that could be best mitigated by sustainable procurement[8]?

06 Procurement digital transformation perspectives

More organizations are moving away from spreadsheets as an automation tool

Figure 20: What type of procurement automation tool do you use?



It is interesting to note that the vast majority of respondents (97%) uses a digital tool to help them in their daily operations, although for 24% of them Excel is still primarily used. When comparing the results from the last survey, it appears that organizations are increasingly shifting away from spreadsheets (used by 38% of respondents in 2020) which is good news for digital maturity. However and not surprisingly, spreadsheets are still mostly used in smaller organizations.

ERP and accounting systems are still mainly used since system consolidation remains a key objective for IT departments, even though the procurement functional coverage is much more limited. **Cloud-based and other procurement specialized solutions continue to penetrate the South African market with solid advantages such as greater flexibility and fit for purpose**[13, 14].

69% of South African organizations have started the digitalization of their procurement process

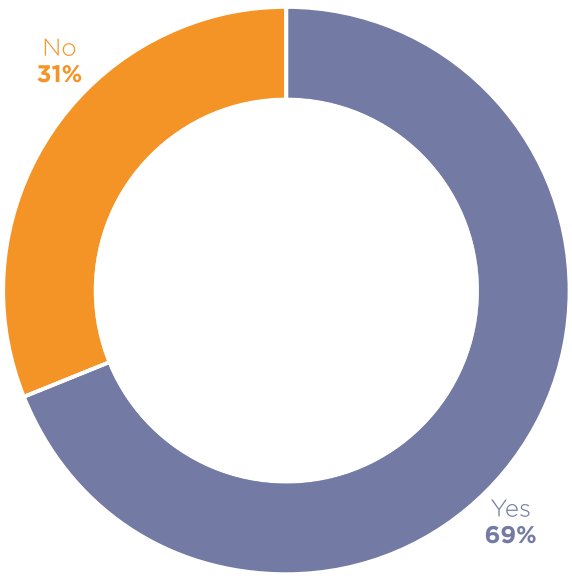


Figure 21: Has your organization started the digitalization of its procurement process?

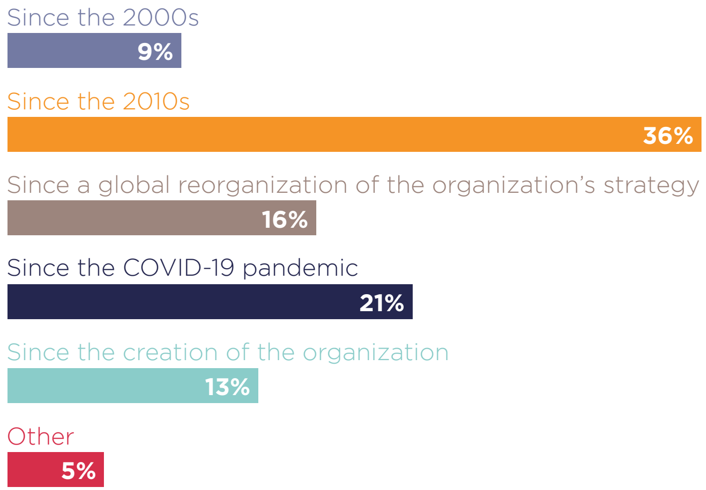
Approximately 70% of respondents state they have started digitalizing the procurement process. However, there is no indication of the level of digitalization achieved.

We can, once again, compare these results with those obtained two years ago (57 % yes; 43 % no). They show a **real improvement in the adoption of digital solutions**, which is quite consistent with the fact that nearly 80 % of respondents in 2020 believe that their organization would adopt a digital procurement solution in less than three years' time (i.e. before 2023).

Only half of the smallest organizations have started the digitalization of their procurement process.

The COVID-19 pandemic has emerged as a major driver for the digitalization of Procurement

Figure 22: When did your organization start to digitalize the procurement process ?



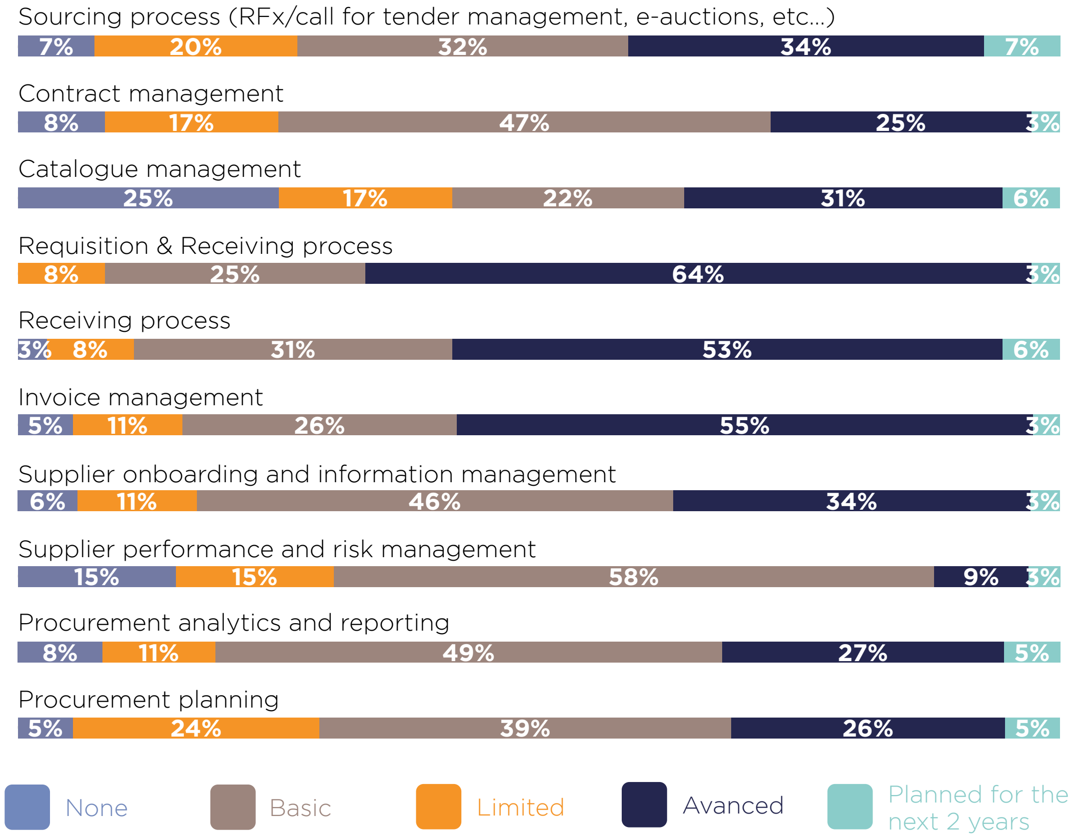
The Covid-19 pandemic has indeed played a role, widely described all over the world, of accelerating digitalization since **21% of respondents claim to have started the process since the pandemic**. A recent study by Forrester demonstrates the key role of Procurement, particularly through digitalization, in helping restoring growth[15].

Automation is mostly applied to transactional processes but fails to reach upstream procurement processes

This is not surprising as we have observed that ERP and accounting solutions are still mostly used as procurement automation tools. They indeed mainly cover the transactional part of the process (ordering, receiving and invoicing) with a limited coverage of the upstream (procurement planning, supplier management) where the true value of Procurement lies.

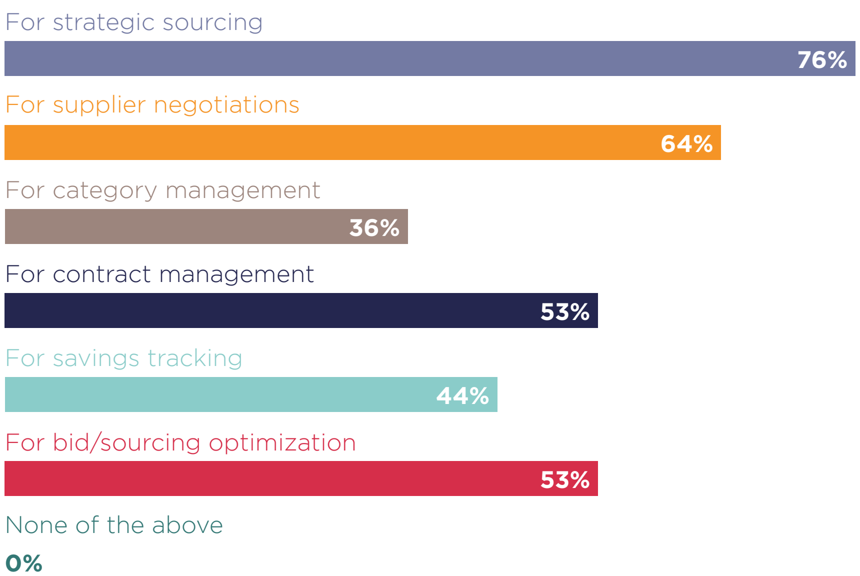
If automation cannot be an objective but rather a means to an end[16], these findings suggest **significant opportunities for progress regarding the automation of certain processes**[17, 18].

Figure 23: Indicate the degree of automation of the below procurement processes in your organization



SA organizations mostly use data to enable their strategic sourcing

Figure 24: How do you use data to improve procurement practices?



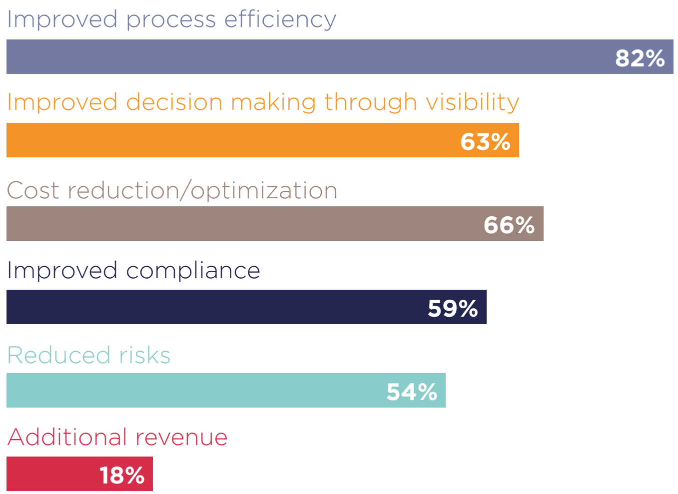
Following the last finding which showed a limited degree of automation in Source-to-Contract processes, this question aimed to assess the level of digital maturity on these specific processes.

Respondents mostly use data in strategic sourcing to improve their procurement practices. Strategic sourcing has become extremely critical the last two years, as it aims not only to reduce the cost of materials but also to build long-term relationships with suppliers in order to minimize disruption in the supply chain. Data is indeed critical to achieve these objectives as it enables organizations to gain visibility into spending patterns and create forecasts based on historic data. Procurement teams can then create strategic sourcing plans that will help them source the right supplier(s), make them available to the business teams for procurement and, as a result, reduce maverick spend.

Needless to say, the data must be reliable and actionable to enable informed decision-making. Today, most digital procurement solutions provide a way to automatically collect, analyze and convert data into actionable insights, which can be particularly useful for decentralized procurement structures.

Improved process efficiency is the top perceived benefit of digitalization

Figure 25: What are the top benefits of digitalization as perceived by your organization?



Improved efficiency, cost reduction/optimization and improved decision-making are the top 3 benefits of digital procurement perceived by SA organizations. This is interesting from a business case perspective as many procurement teams struggle to demonstrate the benefits of a digitalization project. It is true that the saving opportunities identified through increased spend visibility are an essential element in justifying the investment, but this is rarely enough – especially in the first 2 years- to ensure Return on Investment. However, one aspect that is usually underestimated is the improved operational efficiency - through automation- which delivers value from day one after Go-Live. Although this dimension is more difficult to measure and convert into a financial metric, its impact is one of the most significant in the calculation of ROI.

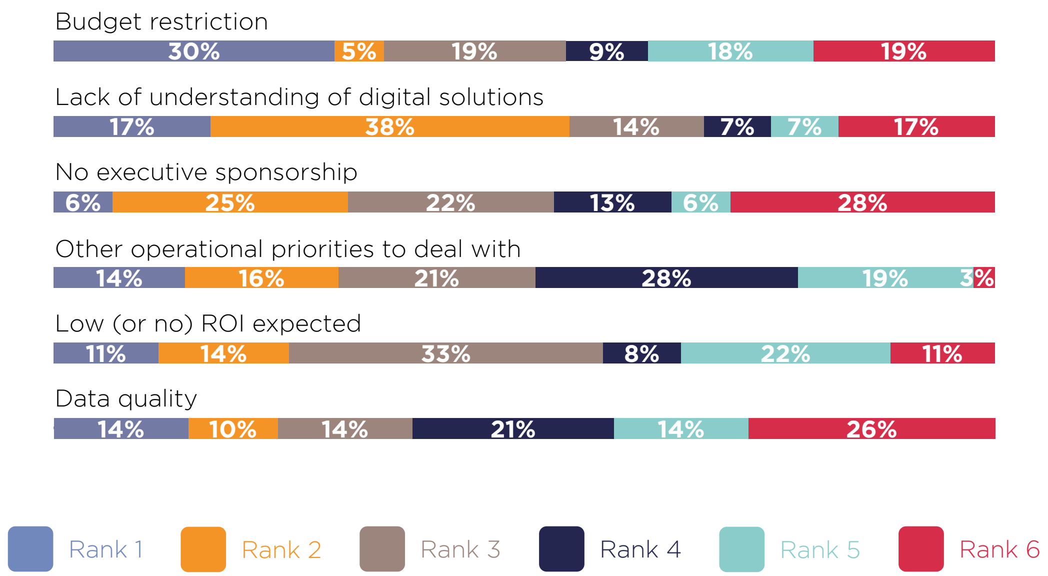
Ultimately, if improved process efficiency is widely recognized as an important benefit of digitalization, it should not be left out when calculating the ROI of digital procurement solutions.

Operational priorities have emerged as a major barrier to procurement digitalization

Only a third of respondents answered the question, which suggest that respondents (for those whose organization is engaged in a digitalization process) have difficulty understanding the internal barriers to their projects. Overall, budget restriction and lack of understanding of digital solutions are the most common barriers.

It is worth noting in this respect that these results are fully in line with the findings from the last Procurement survey. However, **"other operational priorities to attend to" moved up from the 4th to the 2nd barrier identified by respondents**. While several major firms took advantage of the Covid pandemic to progress in their digital procurement journey, for many other organizations the priority was to keep the business afloat and ensure a good cash management, leaving low to no bandwidth to engage in digitalization projects.

Figure 26: What could be the most important barriers to digital procurement in your organization?

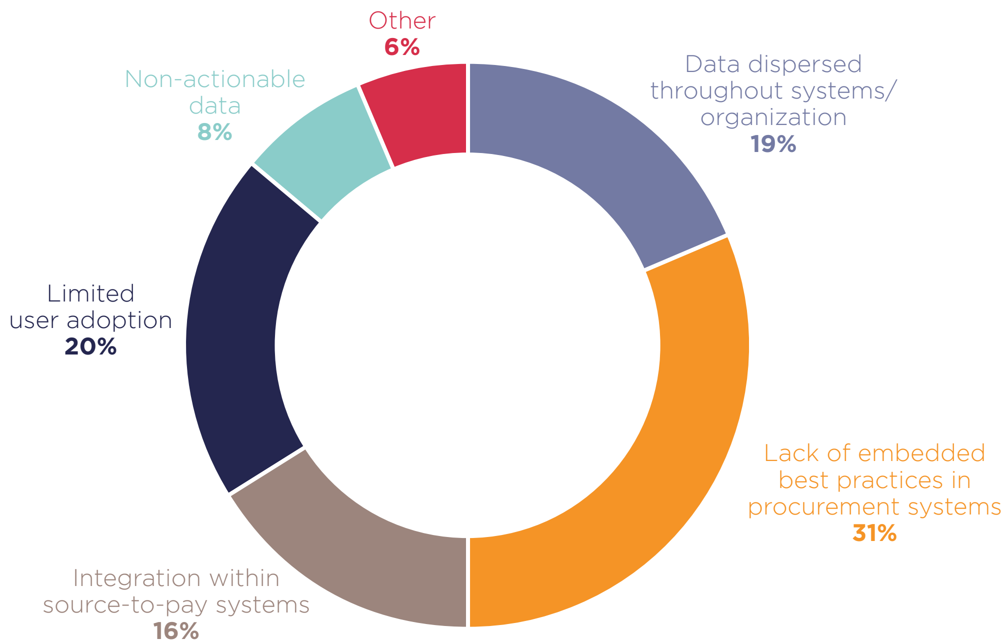


Lack of embedded best practices is the main limit to the value of digital solutions

This finding directly highlights the gap between the methodology offered by digital solutions providers and the reality of the South African procurement market. Today, most technology providers offer extensive procurement systems where configuration possibilities are endless. As a result, especially when the business need and processes are not carefully articulated, implementation projects become mired in internal indecision or, worse, conflict. It Is therefore critical to have a clear vision of what are the best procurement practices in the specific context and industry of the organization. **In most cases, contracting with a procurement consultancy and/or selecting a technology provider that integrates industry standards are the most effective way to avoid this pitfall**.

It is also interesting to note that limited user adoption, 20% of total responses, appears to be the main barrier for smaller organizations.

Figure 27: In your opinion, what limits the value of technology solutions?

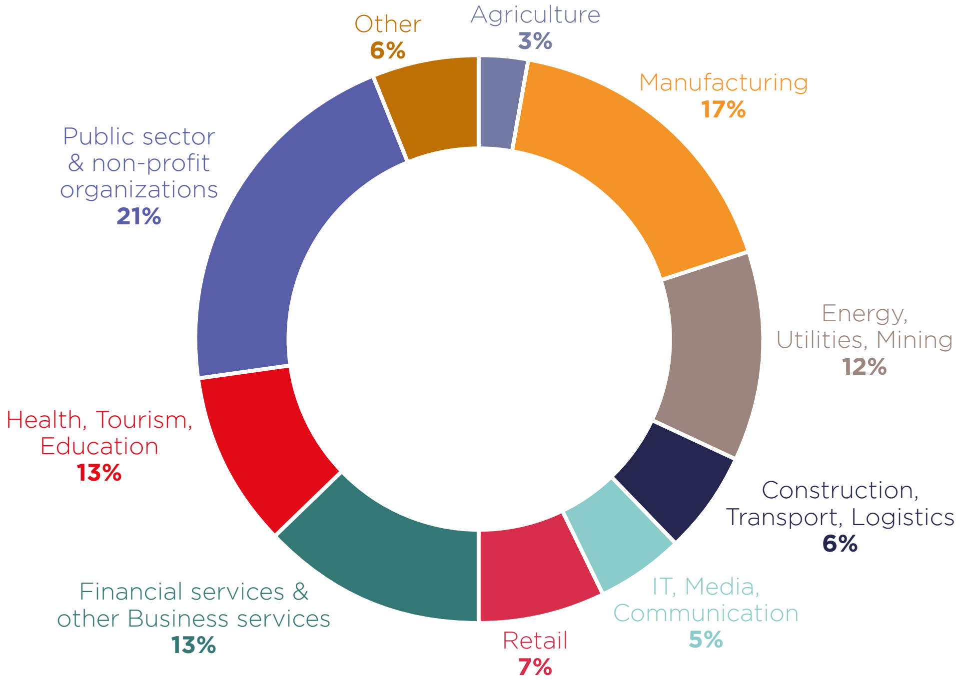


07 Survey respondents profile

This report and its results are based on an online survey conducted between February and Avril 2022 with a total of 119 responses collected. The procurement professionnals and influencers' profiles are detailed in the following figures.

Industry distribution

Figure 1: In which sector does your organization operate?



Organizations size

Figure 2: How many people are employed in your organization?

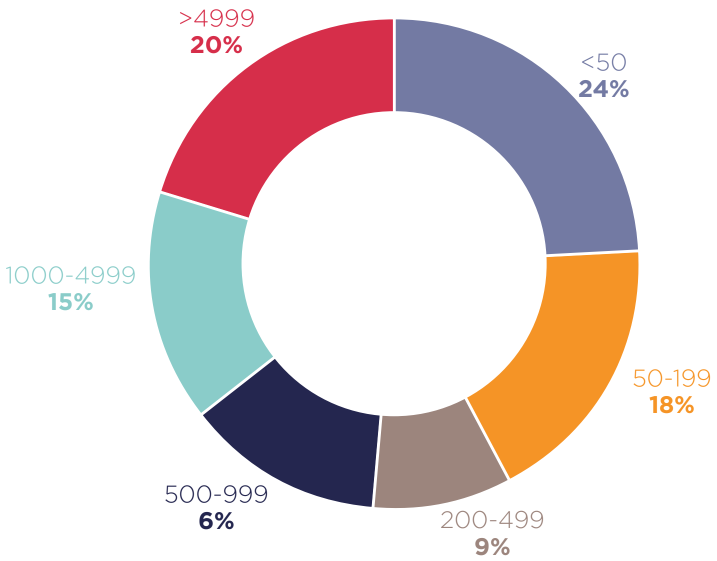
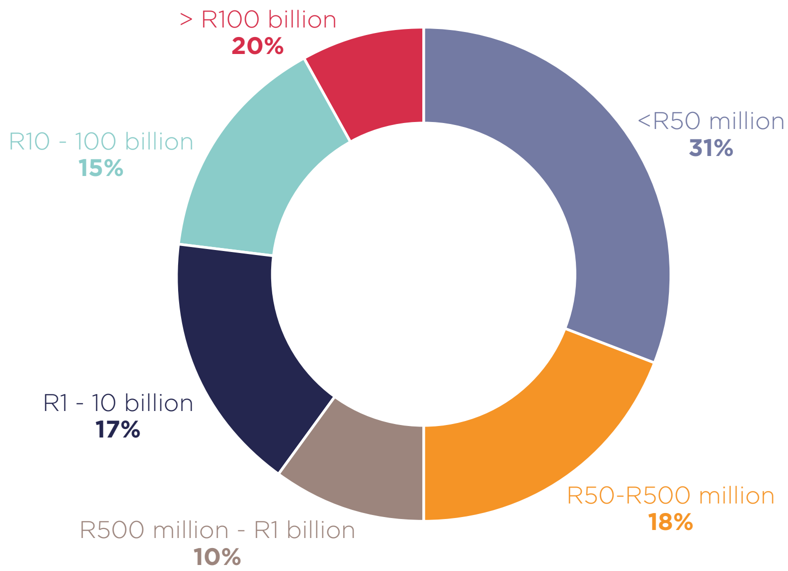


Figure 3: What is your organization latest turnover?



Respondent's role and seniority

Figure 28: What is your position?

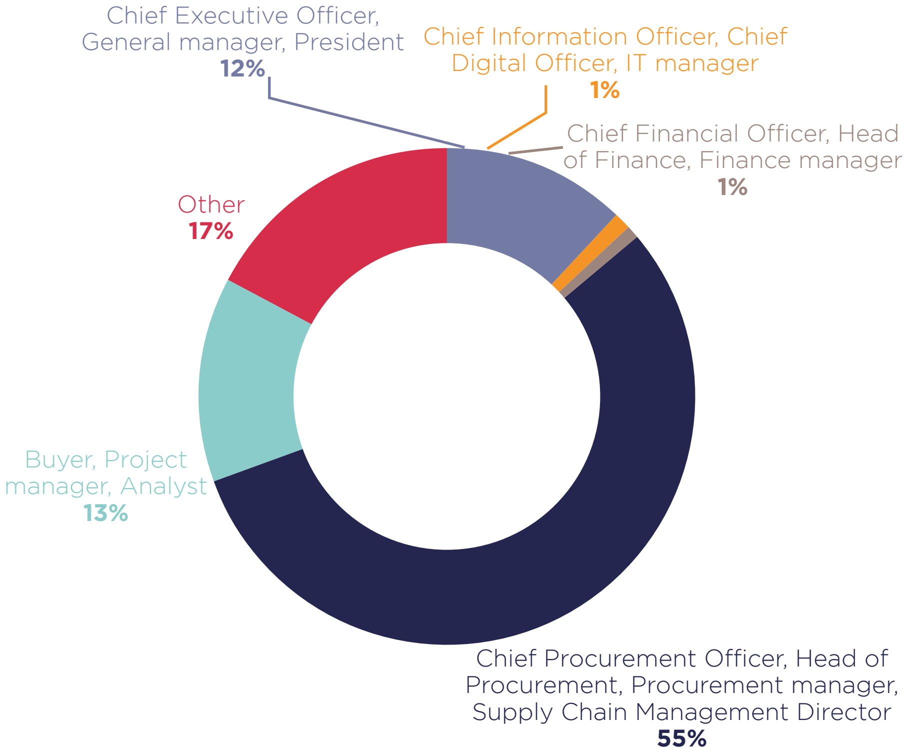
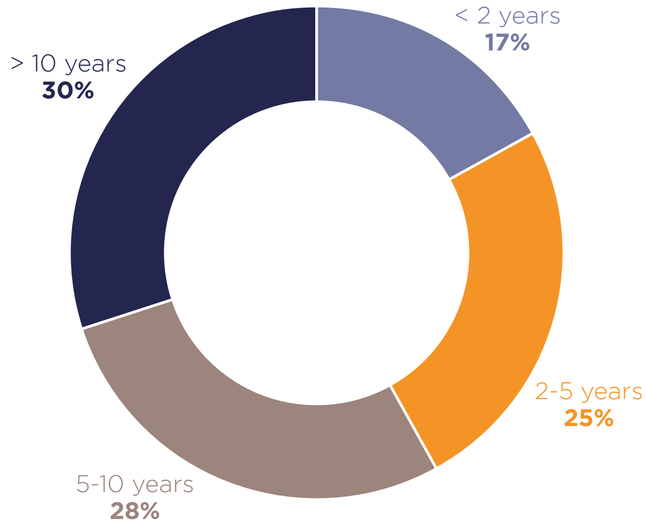


Figure 29: How long have you been working for your organization?



08 Credits informations & references

About Oxalys

Let's make your procurement a driving force of your performance!

As we see every day, digital procurement plays a major role in the transformation of companies and organisations. Because its process is cross-functional, it has a profound impact on the way they operate both internally and externally. Working to improve procurement processes quickly brings positive financial, organisational and ethical results.

As a pure player technology provider in Procurement, Oxalys is the preferred partner of mid-sized and large organisations from all industries in more than 25 countries around the world.

The Oxalys solution helps you digitalze the entire spend and procurement process: Sourcing and contracts, purchasing and invoices, supplier relations and procurement performance. It is a pragmatic solution developed in full awareness of the various operational needs.

Today, our procurement management software stands out for its ability to address all procurement-related tasks, while being extremely adaptable, quick to implement and easy to use.

Our objective is to make digital procurement easy for all private and public organisations.

Oxalys

Make procurement **easy**

Procurement and spend management software

Source to Contract | **Purchase to Pay** | **Supplier relationship** | **Procurement steering**

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Summary

Acknowledgments

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- **Debbie Tagg**, Chief Operations Officer of Smart Procurement World
- **Hugues Poissonnier**, Associate Professor in controlling and procurement management

About CIPS

The Chartered Institute of Procurement & Supply (CIPS) is the world's largest procurement and supply professional organisation. It is the worldwide centre of excellence on procurement and supply management issues. CIPS has a global community of over 200,000 in 150 different countries, including senior business people, high-ranking civil servants and leading academics. The work of CIPS has taken the profession from backroom to boardroom where today's members & practitioners play a central role in the strategic direction of their organizations.

https://www.cips.org

About Smart Procurement

Smart Procurement (SP) runs the largest professional development event and online linkage platform for procurement and inbound supply chain. These initiatives are supported and endorsed by industry professional bodies.
Smart Procurement is committed to driving professionalization, whilst simultaneously supporting economic development objectives across the continent through enterprise, supplier development and market access for small businesses to the supply chain.

https://smartprocurementworld.com/

About Hugues Poissonnier

Hugues Poissonnier is Associate Professor at Grenoble Ecole de Management where he is responsible for courses in strategy, control and procurement. He also teaches in several business schools, engineer schools and Universities in Europe. He focuses his research activities on collaboration in inter-organizational contexts, subject on which he has written several research articles and 30 books. He is also member of the research chair "Economic Peace" and director of IRIMA, which is a research institute focusing its activities on procurement and collaboration between organizations. He has developed many training sessions for organizations dedicated to buyers, vendors or human resources teams.

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