



Deloitte has in the region of **200,000** professionals worldwide



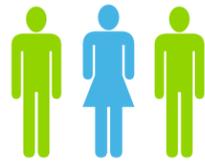
Deloitte provides services to **150+** countries worldwide

Deloitte has **15,000** TMT professionals worldwide



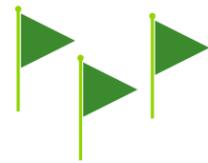
**48** Member Firm practices across Americas, EMEA, and Asia Pacific with

African professionals



Deloitte in Africa has **6,500+** professionals **360+** partners

Presence in Africa



Deloitte is physically present in **34** countries and provides services to **51** countries in Africa

TMT clients

Deloitte provide services to **18** of the **24** largest technology companies worldwide

Deloitte provide services to **50+** TMT clients in Africa



Global TMT practitioners

Europe



4,000+

North America



5,950+

South America



500+

Asia Pacific



3,900+

Africa and Middle East



650+

Deloitte has a proven ability to deliver TMT projects across multiple territories on the continent harnessing its network on the ground while also tapping into global centres of excellence where required.

# Deloitte at a glance

## Core competencies and key characteristics

- Understanding of the link between shareholder value, strategy, and execution
- Outstanding global credentials in TMT sector competencies and experience from an impressive client base
- Deep experience in M&A transaction advice and due diligence
- Broad M&A transaction services competence base with Vendor and Buy Side due diligence advisory, SPA Advisory, IT, HR, Pensions, and other specialist areas
- Cross functional M&A competence enabling advice throughout the entire transaction process
- Understanding of strategy, processes, organisation, and IT and the relationship between these key components
- Deep knowledge in strategy and operations, IT, regulatory and risk management, tax management, and more
- Deep knowledge in Human Capital services, essential in countries that require human resources training and capabilities acquisition

## Deloitte Touche Tohmatsu Limited

- In the region of 200,000+ professionals
- 150+ countries
- 700+ offices
- Annual revenue of USD 31.3 billion



# Deloitte service offerings

## Consulting

- Business Strategy
- Transformation Leadership
- Commercial Excellence
- Operational Excellence
- SSC and Outsourcing Advisory
- Integrated Performance Management
- IT Strategy and Architecture
- Systems Integration and Implementation
- Portfolio and Program Management
- Enterprise Cost Reduction
- Human Capital Services

## Financial Advisory

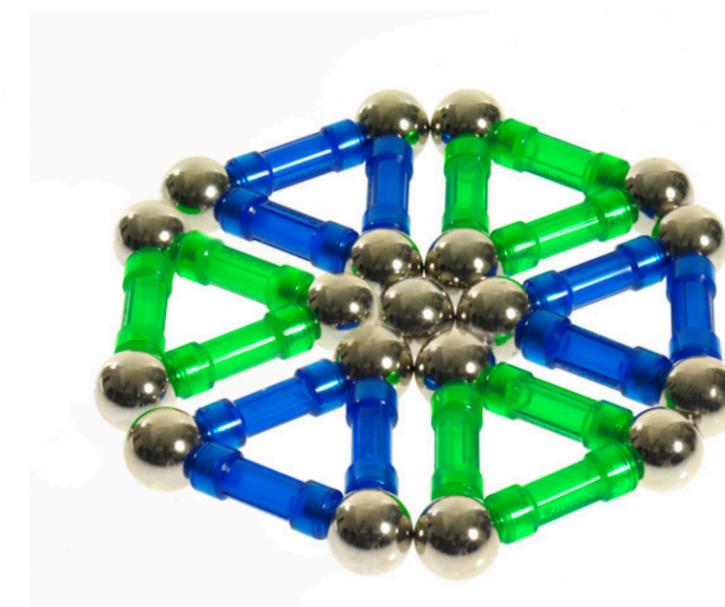
- Transaction Services
- Financial Due Diligence
- Commercial Due Diligence
- IT Due Diligence
- SPA Advice
- Reorganisation Services and Sell-Side Advice
- Valuations
- Corporate Finance
- Post Merger Integration

## Tax

- Corporate Tax
- International Tax
- Indirect Tax
- M&A Tax & Structuring Advise
- Global Employer Services
- Incentive Programs
- Transfer Pricing

## Audit and Enterprise Risk Services

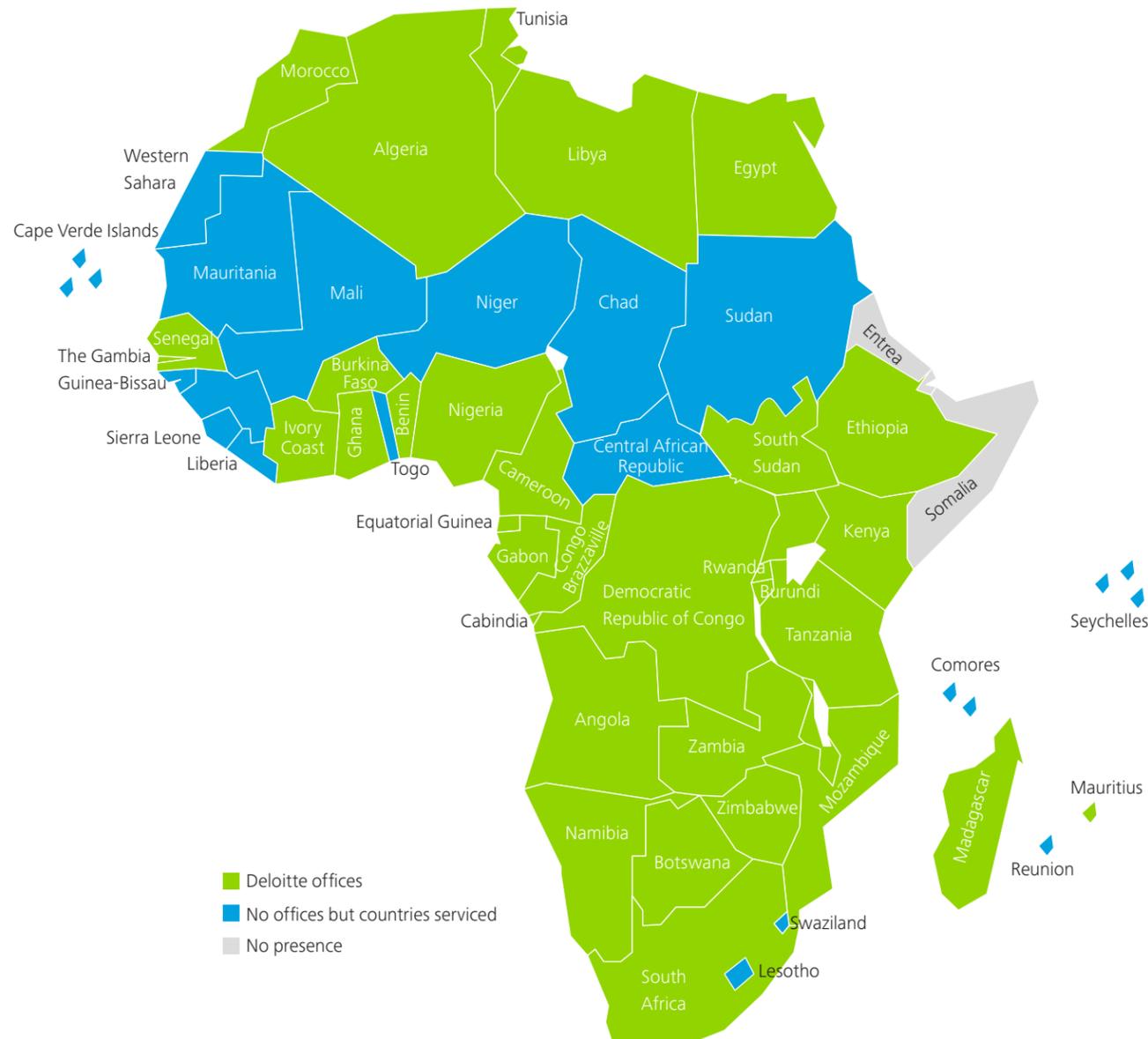
- Assurance Services
- Enterprise Risk Services
- Environmental and Sustainability Services
- Accounting and Financial Reporting
- Restructuring Support



# Deloitte in Africa

“Deloitte’s approach to serving its clients is to highlight the full breadth of its consulting services in strategy, operations management, IT, HR, and financial consulting. A true multi-service consultancy, Deloitte is the only consulting provider with strong capabilities across all five of these service lines.”

Source: Kennedy Consulting Research & Advisory; Global Consulting Marketplace 2011-2014; © Kennedy Information, LLC. Reproduced under license.



## Deloitte in Africa

Deloitte, one of the world’s leading professional services firms, provides audit, tax, consulting, and financial advisory services through nearly 6,500+ professionals and 360+ partners in Africa. We have offices in 34 countries on the continent and extend our services to clients in 51 countries. Our local on-the-ground presence ensures that we understand local nuances and how to help our clients navigate challenges. This is supplemented through strong regional practices and global cooperation.

The 34 practices on the continent are structured in terms of the following hubs:

- Southern Africa
- Francophone Africa
- West and Central Africa
- East Africa
- North Africa
- Angola
- Mauritius

Deloitte has the proven ability to deliver projects across multiple territories on the continent harnessing its network on the ground while also tapping into global centres of excellence where required.

## Doing business in Africa

The world’s attention is increasingly being focused on Africa, with multinational companies and state players competing to strengthen their presence on the continent. For many years, Africa has been a region that investors were nervous about, posing significant challenges such as cultural differences, logistical, legal, and risk management.

In the past few years Africa is suddenly in everyone’s sight. Mineral wealth and increasing urbanisation has led to many of the continent’s countries posting significant GDP growth figures. Companies contemplating doing business in Africa should recognise they face opportunity and risk in equal measure. Deloitte recognises that solutions developed outside Africa (be it Europe, Middle East or Asia) do not seem to work well in Africa. Therefore, the goal is finding the right solutions for a particular country and not assuming imported solutions or Africa-wide solutions work for every situation.

# Deloitte TMT in Africa



Over the last ten years, the Technology, Media and Telecommunications (TMT) sector—and its impact on how we work, live, and are entertained—has changed markedly. We understand the challenges and convergences of the industries in which our clients operate, and work collaboratively to provide a tailored approach to their business needs. Our Deloitte industry professionals are able to provide our clients with proven Pan-African professional services combined with global expertise, for an integrated business approach. As a seamless united group, Deloitte has the capability to easily move resources and talents to where they are required based upon client needs and is able to offer unique and comprehensive solutions to the clients.

## Clients in Africa

Our clients include some of Africa's top software companies, computer manufacturers, wireless operators, satellite broadcasters, advertising agencies, and semiconductor foundries—as well as leaders in publishing, telecommunications, and peripheral equipment manufacturing.

The firm's top clients include:

- MTN
- Naspers
- Cell C
- Vodafone
- Bharti Airtel
- Orange (France Telecom Group)
- Telkom
- Samsung
- Department of Communications SA
- DiData
- Altech
- Safaricom
- Vivendi S.A.
- Movitel
- Unitel
- Telkom Kenya
- Min Telcos/Angola Telecom/Inacom
- TTCL
- Comium CI
- Oricel CI
- Wana Corporate
- Ericsson

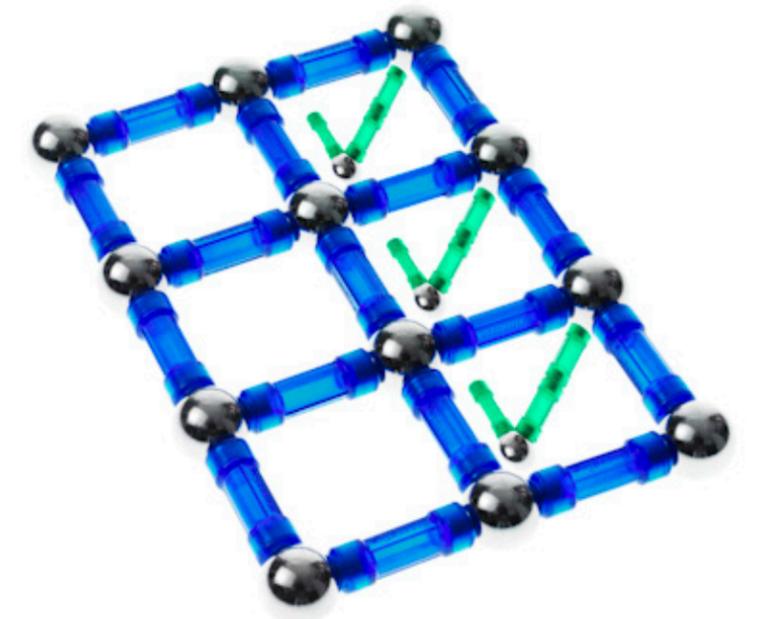
## Our TMT differentiators

- Deloitte Africa integration improves competitive advantage by incorporating regional mobility.
- Globally-led research that applies to Africa and underscores our insights and knowledge of the territory and its dynamics
- Development of "signature solutions" for TMT clients

# TMT priority propositions in Africa

The Global TMT priority propositions introduce some of the most timely and compelling service areas in the TMT industry. These propositions gain priority investments on their potential to create worldwide growth. The TMT priority propositions are:

- Finance Transformation and Shared Services
- International Financial Reporting Standards (IFRS)
- Operation Support Systems (OSS)/Business Support Systems (BSS)
- Data Analytics
- Post digital Enterprise
  - Digital Transformation
  - Cyber Security
  - Cloud Computing
- Mergers & Acquisitions
- Regulation
- Human Capital



# TMT priority propositions in Africa

## Finance Transformation and Shared Services

- Assists finance executives with assessing and enhancing their finance strategy and vision, and helping design and implement changes to their organisations, processes, and systems to improve the overall value of finance
- Provides a full-range of services across all industry sectors to deliver solutions that address the spectrum of critical needs of today's finance organisation
- Helps Deloitte clients improve all aspects of performance in their finance organisation, from reporting and controls to finance operations to strategy and execution
- Provides corporate and shared services structures development and implementation services
- Assists in Business Process Outsourcing, that provides service delivery in finance, accounting, tax compliance, and human resources
- Provides back-office services like account receivable, payable, general ledger, financial records, etc.

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## International Financial Reporting Standards (IFRS)

- Helps overcome financial reporting challenges in today's globalised environment by providing high-quality, practical, and multifaceted IFRS and US GAAP solutions to facilitate cross-border transactions and access to capital markets
- Acts as an advisor in an increasingly complex and challenging business environment.
- Serves as a multifunctional advisor to help Deloitte clients navigate the challenges associated with financial reporting, regulatory environment, litigation risk, and internal cost pressures and achieve timely and accurate financial reporting in a cost effective manner
- Provides global advice by leveraging technology and collective experience to identify the right people and processes to overcome challenging financial reporting obstacles

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# TMT priority propositions in Africa

## Operation Support Systems (OSS)/Business Support Systems (BSS)

- OSS—helps in maintaining network inventory, provisioning services, configuring network components, and managing faults
- BSS—helps in taking orders, processing bills, and collecting payments
- Assists Deloitte clients in
  - Front-end, Contact Centre (CC), Customer Relationship Management (CRM), and definition and development
  - Business Intelligence and Information Management
  - Billing systems development and integration
  - Social media and digital content platform analysis, definition, and integration

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## Data Analytics

- Helps Deloitte clients to gain data-driven insights that inform strategies, strengthen governance and decision-making, improve compliance, and enhance performance
- Assists Deloitte clients in building analytics capabilities as a source of competitive advantage, and unlocking the hidden potential of their data in key domains and functions
- Employs a range of tools, techniques and approaches drawing on sophisticated statistical and quantitative analyses; exploratory techniques, such as data visualisation; and explanatory and predictive

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# TMT priority propositions in Africa

## Postdigital Enterprise

### 1. Digital transformation

- Develops digital product strategies
- Designs architect and implements digital technologies
- Understands process and organisational impact and delivers associated business change
- Assists in rights, royalties, and revenue assurance work
- Designs technology infrastructure leveraging options such as Cloud
- Develops business case for moving to digital production and distribution
- Assists in restructuring and re-organisation of traditional media businesses to move to digital operating models
- Supports in deal and due diligence both on the buy and sell side
- Responses to regulatory demands
- Assists in digital customer segmentation

### 2. Cyber Security

- Assess the maturity of cyber security controls and benchmark those controls against industry peers
- Defines, mobilises, and supports enhancing a range of cyber security controls
- Coordinates the response to a security breach
- Analyses the anatomy of a cyber attack to determine the root cause and recommend remedial activity
- Understands and maps technical threats to business risks leveraging diagnostic tools
- Provides test incident response processes and raises executive awareness of cross-functional impact
- Defines blueprints for cyber security controls to be embedded within the organisation
- Designs and executes a tailored training and awareness campaign to reduce the risk of social engineering
- Conducts application penetration test, secure code review, infrastructure vulnerability scan, and advanced malware scan
- Optimise a SOC including organisational model, technical architecture, operational procedures, reports
- Implement sophisticated monitoring use cases to address cyber espionage, APTs, insider threats, etc.
- Provides 24x7 managed security service monitoring and defends against cyber threats to an organisation

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# TMT priority propositions in Africa

## 3. Cloud Computing

Deloitte offers the following services in Cloud Computing:

- Cloud Computing Readiness Assessments
- Cloud Strategy and Enablement services, Including
  - Business and operating model services
  - Ecosystem Orchestration advisory and implementation services
  - Design and implementation of Cloud adoption
- Provides business transformation services (procure-to-pay, order-to-cash, marketing, mobile application, and cloud based application development)
- Cloud infrastructure planning and design services
- Data Governance
- IT Security, Risk & Compliance, advisory services
- Assurance Services for Cloud Providers
- Tax and legal strategies
- Deloitte-as-a-Service
  - Deloitte as a SaaS provider (e.g. through Oco)
  - Deloitte-as-a-Service (Actuarial, Continuous audit, pricing, analytics, tax advisory, etc.)
  - Deloitte Cloud ventures (joint investment with industry, academia, software providers, etc.)

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## Mergers & Acquisitions

- Helps Deloitte clients successfully navigate all significant mergers, acquisitions, restructurings, and divestitures by providing services across the deal lifecycle from M&A strategy and target origination, through the entire range of structuring, commercial, financial, and operational due diligence, transaction execution, and post-merger integration activities
- Assists Deloitte clients operating in multiple countries by responding quickly and effectively with domain knowledge, extensive industry specialisation, and global reach to provide a tailored approach designed to address unique needs and build value
- Provides a full-range of services for multi-national companies and private equity companies across the entire deal lifecycle

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# TMT priority propositions in Africa

## Human Capital

- Defines HR Strategic roadmap based on specific needs of emerging economies:
  - Organisation model, job design and qualification
  - Career management, mobility and expats
  - Performance management
  - Total rewards strategy
  - Capabilities building through innovative forms of accelerated development
- Supports the definition of HR service model (governance and operational model, processes, responsibilities, policies, procedures, KPIs)
- Supports the identification of talent pools through the assessment of specific behavioral, leadership and management competencies
- Builds and develops internal clients' capabilities through
  - Identification of training needs
  - Building corporate universities (strategic, operational, infrastructure and education models)
  - Building and executing training plans
  - Develops strategic change initiatives for large and complex transformations
  - Helps the development of an "employer brand" to promote talent acquisition

## Regulation

- Helps clients on regulatory issues in the sector, ranging from policy through to regulatory accounting, interconnection, pricing and spectrum
- Carries out analytical work on network costing, competition analysis, and customer behavior to support clients during regulatory investigations
- Advises clients on regulatory strategy and compliance

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# Sharing industry insights Thought leadership

Through thought-provoking publications, surveys, reports, and insightful commentary, Deloitte delivers innovative, practical knowledge companies can use to improve their overall business performance. Our global network of research professionals and senior consultants can identify, analyse, and help explain the issues critical to businesses across a variety of industries.

One of our jobs is to make sure our clients have access to thought leadership tools to help anticipate what comes next. Here are a few highlights from our recent publications that you may recognise.

## Thought leadership



### 2012 TMT Predictions

TMT Predictions are Deloitte's view of the key developments over the next 12-18 months that are likely to have significant medium- to long-term impacts for companies in TMT and other industries. The goal of Predictions is to catalyse discussions around significant developments that may require companies or government to respond.



### The Post Digital Environment Getting ready for 2020 and beyond

This paper focuses on the marketplace 10-20 years from now when the developments referred to have fully converged and are a standard feature of business, irrespective of the industry.



### 2012 Innovating for a digital future

The Innovating for a Digital Future report focuses on a critical challenge for TMT organisations—how to innovate beyond products or deeply ingrained ways of working which have been successful to date, but which are now holding back an organisation from its next stage of evolution.



### Open Mobile: The growth era accelerates

This is latest study in a series of ongoing mobile research from the TMT team in Deloitte Research and offers insight and guidance on maintaining competitiveness in the face of heightened market competition and technological disruption.



### Scaling Edges: A Pragmatic Pathway to broad internal change

The paper introduces and breaks down the three-pronged framework for executives seeking to embark on the difficult, but necessary transformation required to seize many market opportunities today.



### State of the Media Democracy Survey, Sixth Edition

The survey provides unique generational insight into how consumers interact with technology, purchase products, respond to advertising—and what they'll likely be drawn to in the future.



### Social Media in Africa

It's almost impossible these days to have a conversation that doesn't touch on the world of social media. Our world in Africa has now passed "the tipping point" where more and cheaper bandwidth, combined with cheaper and increasingly versatile mobile devices have been inextricably linked to a universe of highly-functional and user-friendly platforms.



### Mobile Telephony and Taxation in Kenya

This case study explores how Kenya's abolished mobile handset taxes have made mobile services more affordable for the wider population, boosting the Kenyan economy. The report shows that mobile operators will contribute 33 per cent more in tax this year than they did prior to the handset tax slash.

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