

# SOUTH AFRICA OVERVIEW





**Pedro Oliveira**

*Managing Partner IMEA Region,  
Oliver Wyman*



At Oliver Wyman, we firmly believe that South Africa will continue to act as an engine for growth and development for the African continent. We are engaged as partners with our clients across a broad set of industries to collaboratively solve their most complex problems. Through our office in Johannesburg - we continue to invest in South Africa and remain committed to helping clients and communities achieve not just long-term, but also sustainable, development and growth.



Oliver Wyman South Africa marks our long-term commitment to the country and the African continent. We bring together deep market insights from our local team, alongside our global experts, to deliver a breadth of capabilities and experience that creates real impact for our clients. We have a growing multi-disciplinary team in our Johannesburg office that continues to support South Africa's economic and social development.



**Paul Calvey**

*Partner and Market Leader for  
South Africa, Oliver Wyman*



# A GLOBAL OVERVIEW

Oliver Wyman is a global leader in management consulting. With offices in 60 cities across 29 countries, Oliver Wyman combines deep industry knowledge with specialized expertise in strategy, operations, risk management, and organization transformation.

The firm's 5,000+ professionals help clients optimize their business, improve their operations and risk profile, and accelerate their organizational performance to seize the most attractive opportunities.



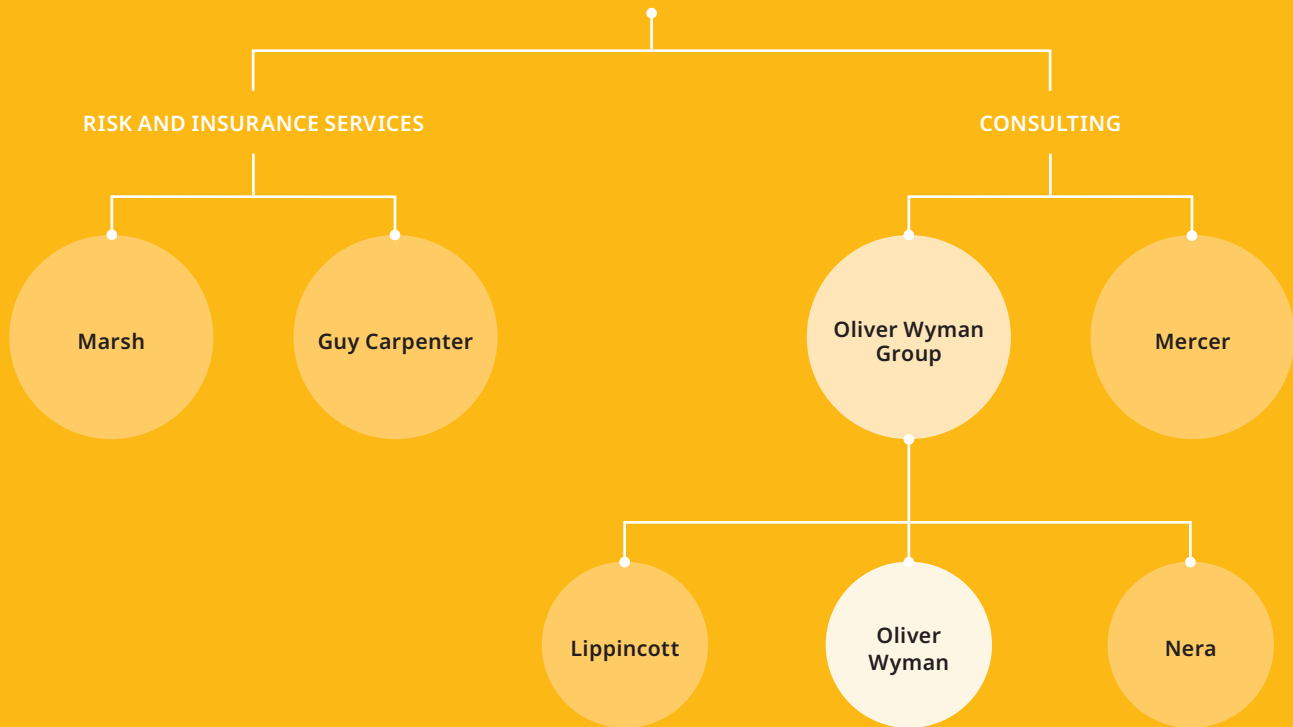
# OUR IMPACT



Clients turn to us for help solving their most pressing issues. Whether their challenge is to find new avenues of growth, optimize operations, improve their risk profile, or inspire the organization to act in different ways, clients look to us for insight and tangible results. They value our deep industry knowledge and our specialized expertise. They appreciate that we go beyond recommendations to accelerate execution. They look to us to have a major impact on both their top and bottom lines.



# PART OF MARSH McLENNAN COMPANIES



As part of Marsh McLennan, Oliver Wyman Group is able to draw on experts from our operating businesses in the areas of human capital (Mercer) and insurance (Marsh and Guy Carpenter).

The Group also contains Lippincott, a leading brand strategy and design consultancy, and NERA, a leading provider of economic analysis regarding highly complex business and legal issues.







# VALUE PROPOSITION

Our value proposition is focused on breakthrough impact for our clients.

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## OUR ANALYTICS

Experience and expertise to **manage, master, and apply data and analytics**

**Embedded and codified solutions** that connect to your data and solve your problems

**Faster time-to-impact** with rapid prototyping and production-quality solutions

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## OUR RELATIONSHIPS

**Impact at the core of our relationship**

**Trusted advisors** who challenge and support

Draw from **extended networks** that include advisory boards, alumni, and academics

**Bring the strength of Marsh McLennan** businesses, people and expertise

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## OUR PEOPLE

**Highly collaborative:** working with you, not on you

**Diverse teams:** top talent and broad range of skills

**Expertise at the core:** best in-class industry specialists, not an army of generalists

**Global approach:** the right people for the right issues

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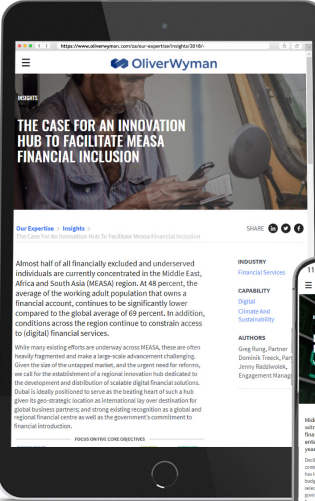
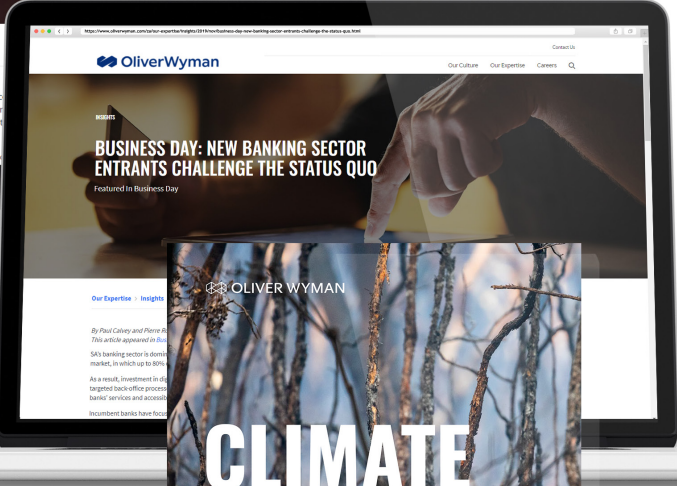
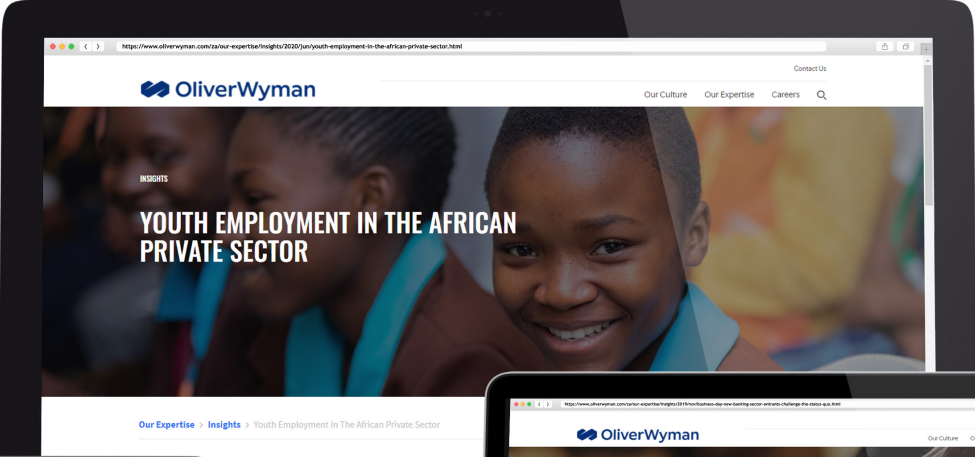
## OUR IDEAS

Deep industry expertise to create **industry shaping insights**

**The best thinkers and ideas** to generate breakthrough ideas that move the dial

**Co-creation and learning opportunities** via tight linkage to our experts

# RECENT PUBLICATIONS





An aerial photograph of a rocky coastline. The water is a vibrant turquoise color, and the rocks are dark brown and jagged. The scene is captured from a high angle, looking down at the water and the shoreline.

# **OLIVER WYMAN IN SOUTH AFRICA**

**We bring expertise and  
experience in the market  
through a variety of  
assignments over the  
last two decades.**



For over 20 years, Oliver Wyman has helped leading enterprises throughout the African continent to develop, build, and operate strong businesses that deliver sustained shareholder value growth. With the opening of a local office in Johannesburg in 2020 and the build out of a local team, we have deepened our commitment to the continent.

Our current industry focus in the region includes financial services, mining, energy, communications, media & technology and transportation. We have a broad range of skill set and expertise and a solid history of supporting the region in a variety of assignments, including growth development, reorganization, new digital builds and turnaround strategies.

We are committed to Broad Based Black Economic Empowerment (BBBEE) and are rated as a Level 3 contributor. We continue to pursue ways to contribute more broadly to society through our Corporate Social Responsibility work.



# INDUSTRY COVERAGE

**We are committed to industry specialization because we know you don't have time for a learning curve.**



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# Financial Services

We have an unparalleled understanding of the evolving market structures, economics, and strategic, digital and regulatory trends across all segments of the financial services sector.

We work for over 75 of the top 100 financial institutions globally and our clients in the region include leading retail banks, corporate and institutional banks, insurers, wealth and asset managers, market infrastructure providers, regulators and fintechs.

We have been supporting Financial Services clients in South Africa for the last two decades.

## REPRESENTATIVE REGIONAL PROJECTS INCLUDE

*Ecosystem strategy and design for an African universal bank*

*Financial Services trends analysis for a market regulator*

*Business case review for a new digital bank in South Africa*

*Risk Management support including model build, risk assessment and regulatory response*

*Groupwide transformation for a leading African bank*

*Micro finance strategy for a fintech*



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# Communications, Media, Technology

Oliver Wyman is the leading advisor for companies and institutions in the Communications, Media, and Technology industries for developing growth strategies for commercial transformation, improving operations, transitioning to digital, and maximizing operational efficiency. We work closely as trusted partners for the region's most successful companies and institutions: telecommunications providers, regulators, ministries, smart city leaders, consumer electronics companies, broadcasters, publishers, platform operators, and online and entertainment companies.

## REPRESENTATIVE REGIONAL PROJECTS INCLUDE

*Broadband churn reduction plan for a leading South African Telco*

*Customer experience improvement plan for a fixed line operator in Africa*

*Overhaul of the long-term technology and infrastructure management plan for one of the largest African telco groups*

*Financial Services strategy and operationalization for a Mobile Network Operator (MNO)*

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# Energy and Natural Resources

Oliver Wyman advises clients along the end-to-end Energy value chain as well as Metals and Mining. We work closely with large NOCs and IOCs, Petrochemical Companies, Utilities and Mining companies across the public and private sector. Our Energy Practice has been working at the forefront of Energy topics, shaping the Energy transition and driving the most recent global multilateral G2G energy agenda. We offer our clients a unique set of capabilities ranging from developing growth and sector strategies, operating model transformation, M&A and Post Merger Integration supply chain and operational excellence, local content development, trading capabilities build-up, sales and marketing strategies, risk management and large-scale transformation management.

## REPRESENTATIVE REGIONAL PROJECTS INCLUDE

*Development of a long-term demand and supply perspective on South African energy coal exports to inform the future strategy for a logistics services provider*

*SmartGrid and AI transformation for a large utility in the MEA region*

*Refresh support of a national mining strategy, develop an action-oriented implementation roadmap and launch the execution of selected initiatives*

*Support the development of an investment promotion strategy for the mining sector of a MEA country*



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# Transportation

Oliver Wyman is a leading advisor for the transportation & services industries. We offer our corporate clients deep expertise in aviation, rail, maritime and logistics services as well as in tourism and today's mobility sectors. Equally, we address the challenges of managing the strong sector growth for and together with government organizations and regulators in the region. We provide advice in strategy development, growth planning, pricing and revenue management as well as organizational transformation, efficiency improvement and M&A.

## REPRESENTATIVE REGIONAL PROJECTS INCLUDE

*Renegotiation support of railway tariffs for a large mining company in Africa*

*Network strategy including routes, hub and partnerships for a leading African airline*

*Collaborative, multi-stakeholder effort to optimize performance of an export corridor*

*Turnaround plan for an African courier and parcel provider*

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# Digital

We partner with clients to deliver breakthrough outcomes for their toughest digital challenges.

We blend the power of digital with deep industry expertise to tackle disruption and create impact. By building strong capabilities and culture, we accelerate and embed digital transformation. Our people co-create and grow customer-focused solutions that win. We modernize technology and harness value from data and analytics. We build resilience so our clients are ready for tomorrow's risks and optimize operations for the future. Above all, we work collaboratively with our clients' leaders, employees, stakeholders, and customers to jointly define, design, and achieve lasting results.

## REPRESENTATIVE REGIONAL PROJECTS INCLUDE

*Digital Trade platform design and build for a Pan-African bank*

*Digital bank strategy and business case assessment for a South African FS provider*

*Payments and Channel digital strategy design for a South African bank*

*Digital Risk platform design for a JSE listed company*



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# Organizational Effectiveness

We help our clients quickly adapt to address their most critical business challenges to achieve the outcomes that matter most. We use co-creation to unite your business experts with our global expertise so they can make breakthroughs on difficult organizational challenges with a more aligned and committed team to deliver on it.

Partnering with industry colleagues and client teams, we design organizations that can thrive in uncertainty and bring behavioural science to accelerate achieving people and business performance goals. Using techniques such as co-creation and design thinking, we unlock wisdom, create agility, and equip our clients to engage and get the best out of their people. We are partners on the journey to successful implementation, meaningful change, and lasting business results.

## REPRESENTATIVE REGIONAL PROJECTS INCLUDE

*Management team structure redesign for a leading South African FS provider*

*Jobs roles, cadre and compensation system redesign for the entire Civil Service of a MEA country*

*Operational and organizational model structure redesign of a public company with the aim to be privatized*

*Support the new leadership team of a recently merged organization align around the new strategy and activate the integration plan*





# SOCIAL IMPACT

Oliver Wyman partners with organizations across the continent whose work improves communities and lives around the world through microfinance, healthcare, education, global economic development, the arts, and much more.

## REPRESENTATIVE REGIONAL PROJECTS INCLUDE

*For Junior Achievement Africa (JAA), development of a five-year strategy around the following key cornerstones: defining JAA's ambition, pursuing selected strategic initiatives, fixing the internal gaps, and growing funding. In April 2020, Oliver Wyman and JAA surveyed 2,600+ youth across six countries in Africa to capture the youth perception of the private sector.*

*For Care International, support on the development of their approach to accelerate women financial empowerment. Care International has been one of the leaders in developing village savings and loan schemes to pull more women into positions of financial empowerment.*

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For more information please contact us at [marketing.imea@oliverwyman.com](mailto:marketing.imea@oliverwyman.com) or by phone at one of the following locations:

Middle East and Africa  
+971 4 425 7000

Europe  
+44 20 7333 8333

Americas  
+1 212 541 8100

Asia Pacific  
+65 6510 9700

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