



# The Future of Tax

**Tax is changing. We're changing Tax.**

Southern Africa Survey



December 2021

[KPMG.co.za](http://KPMG.co.za)

# Foreword

The world is changing rapidly, so is Taxation. In response to the constantly evolving business, economic, technological, social and political developments the traditional Tax Function is undergoing transformation.

Some of the key messages from the 2021 KPMG CEO Outlook survey are that, despite various risks and challenges, South African as well as global CEOs are optimistic about growth. It is anticipated that aggressive growth will be achieved through acquisitions and inorganic methods. Emphasis will be placed on leading with purpose and focussing on digitally transforming their organisations while upskilling an agile workforce in the new world of work.

Around the world tax authorities are seeking to collect information from ERP systems/solutions and other internal core systems in real-time by electronic means. As a result Tax Functions can no longer carry on as in the past. Tax Functions should not only be compliant but also ready for the digital transformation of organisations and tax authorities.

There is a fundamental shift in how data is being collected and exchanged – we are moving away from information being ‘pushed’ to taxation authorities towards a position where it is being ‘pulled’ by them.

From these examples it is clear that having a future-ready Tax Function with digitised tax systems is no longer optional..

At KPMG we believe in a Tax Function that invests in the right mix of people, processes and technologies that would be better prepared for the new demands for business overall and the new tax landscape. Therefore, the goal of this publication is to provide business and tax leaders with insights that would enable them to benchmark their Tax Function, and to provide guidance on what to consider when starting the transformation journey.

We would like to thank all the survey participants for their valuable time and contributions.



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# Glossary of Terms

<b>Board</b>	Board of Directors
<b>CEO</b>	Chief Executive Officer
<b>CFO</b>	Chief Finance Officer
<b>ERP</b>	Enterprise Resource Planning
<b>FTE</b>	Full Time Employees
<b>KPI</b>	Key Performance Indicator
<b>IT</b>	Information Technology
<b>SARS</b>	South African Revenue Service

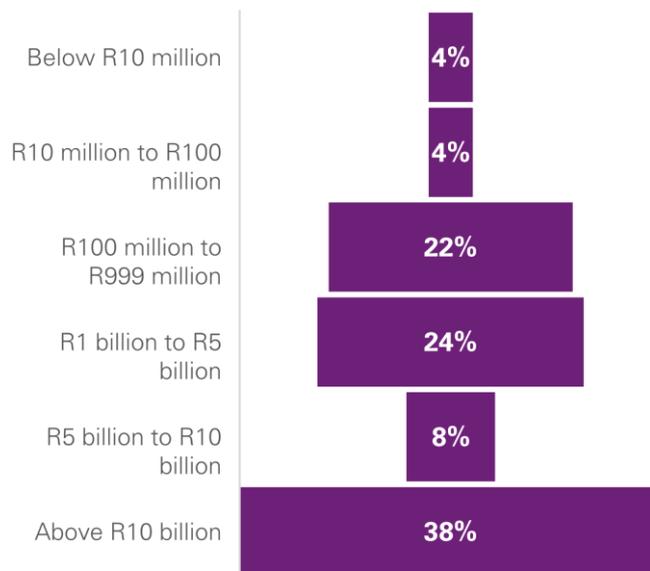
# About the Survey

The survey assesses the current state of the Tax Function focussing on thematic areas such as tax governance and risk management, people and technology. The survey was completed by CFOs and tax leaders from over 50 companies operating across Southern Africa. Our survey participants include a variety of companies and industries with different dynamics and operating models, representing our Southern African landscape.

## Industry mix:



## Revenue distribution:



## Operating status:



56% Headquartered in South Africa

44% Headquartered elsewhere



76% Multinational companies

24% Indigenous companies



50% Publicly listed entities

50% Privately owned entities

Operates only in SA (some exporting to Africa)

48%



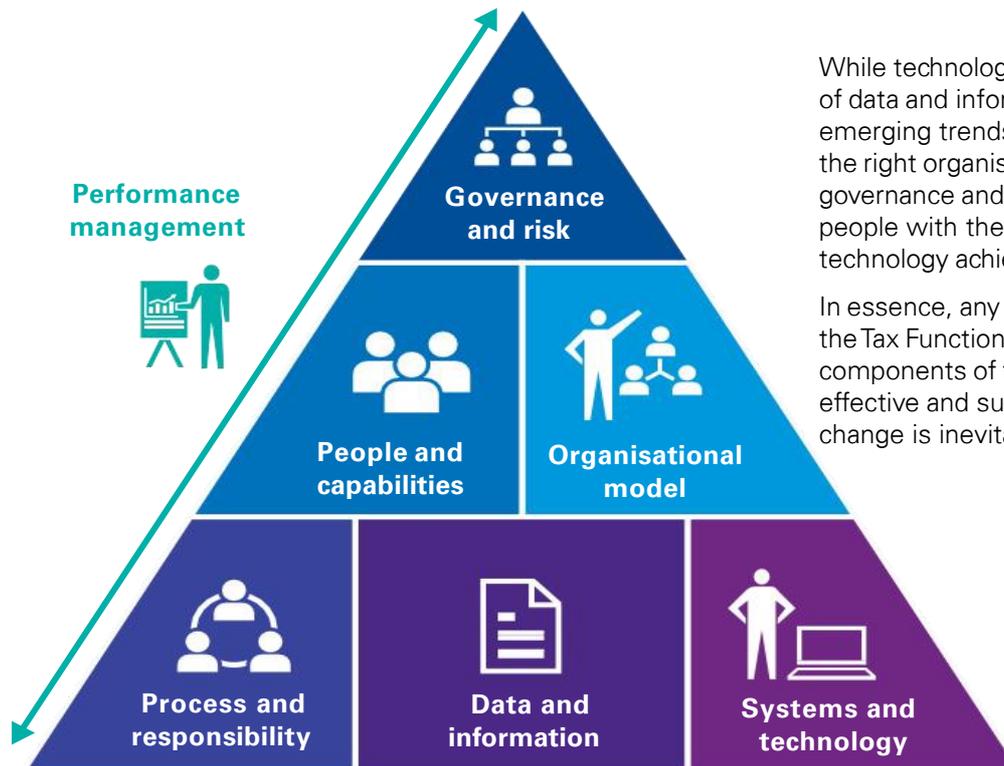
52%

Operates in at least 2 African countries

# Executive Summary

Research conducted by KPMG International reflected that an effective and highly valued Tax Function manages tax risk and compliance and identifies opportunities to add value to the business through core tax management skills and proactive collaboration with all parts of the business. This is the hallmark of a future-ready Tax Function.

Typically, the evaluation of a future-ready Tax Function is done from the perspective of technology maturity or transformation. However, from our experience and leading practice point of view a future-ready Tax Function relies on the successful interplay of all seven components as shown in the diagram below.



Source: KPMG International

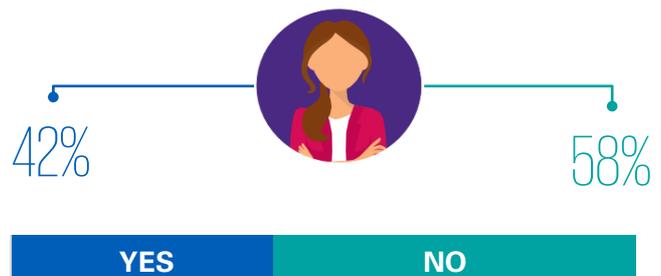
While technology and the related components of data and information are important in view of emerging trends, the Tax Function also needs the right organisational model, an overarching governance and risk framework, and motivated people with the right skills to ensure that technology achieves the desired result.

In essence, any strategy aimed at transforming the Tax Function should consider all the components of the operating model for it to be effective and successful in a world where change is inevitable.

The summary of findings from the survey with regards to the current state of each component of the operating model are as follows:

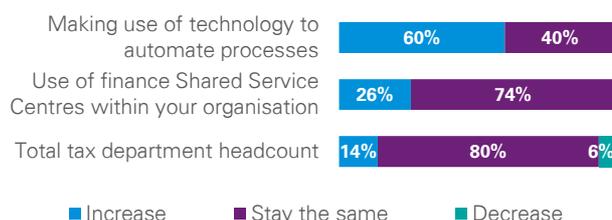
## Governance and Risk

Some of the companies surveyed do not have a documented tax strategy or overarching tax policy that covers tax risks. The tax policy and strategy documents are the primary guides for tax risk identification and management, by the organisation. It is important that both documents are developed, approved and reviewed periodically by the Board. Effective deployment and continuous alignment with reality are key to future success.



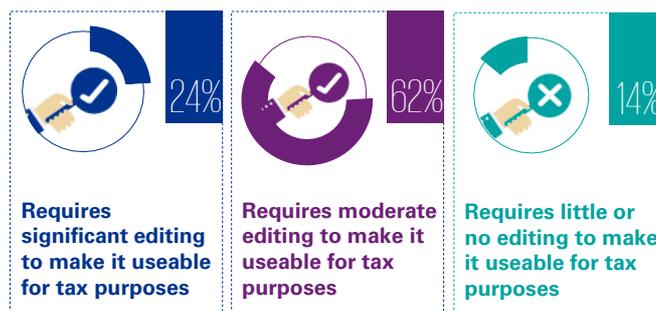
## Organisational model

Tax Functions will have to do more with limited increase in FTEs. Looking ahead most Tax Functions anticipate no change in headcount, but plan to invest in the use of technology and automation of processes (60%), enabling the team to do more with less and freeing up time for value adding activities. There is also an expectation that the use of finance shared service centres will increase by 26%.

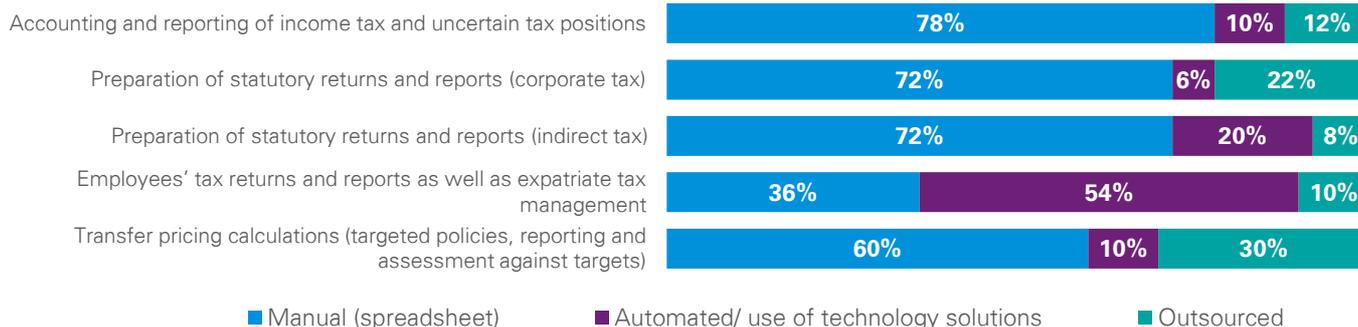


## Data and information

Data required for tax purposes are more often than not obtained from a central source. However, in most instances moderate to significant editing is required before it can be applied for tax purposes. This is also in line with our global experiences.



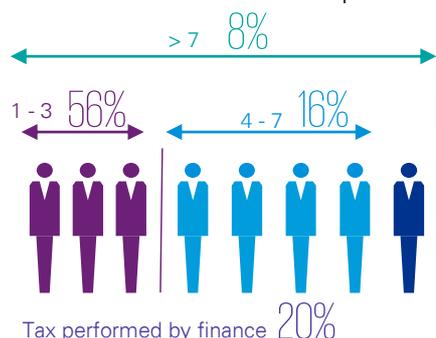
## Process and responsibilities



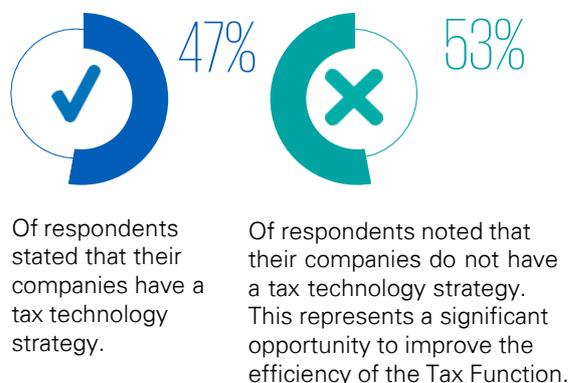
As reflected in the Process and Responsibilities question, most of the responsibilities of the Tax Function are performed manually. This limits the ability of the Tax Function to focus on strategic and value adding opportunities for the business.

## People and capabilities

In the region 56% of the participant Tax Functions have 3 or less FTEs with finance teams performing all tax responsibilities for 20% of the organisations. Considering the growing expectations from and responsibilities of Tax Functions, business and tax leaders would need to evaluate their organisational model (i.e. whether to hire more personnel, co-sourcing or outsource), in addition to automation of some current processes.



## Systems and technology



One of the key accelerators in motivating investment in technology for the Tax Function is by how much the level of technology maturity of tax authorities around the world has increased in a very short period of time. This will escalate exponentially in the next year or two.

# Inside the Tax Function



# Governance and Risk Management

The concept of 'tax morality' has become an important feature of tax discussions globally, with stakeholders calling on companies to be more transparent and socially responsible in their policies and approaches to taxation.

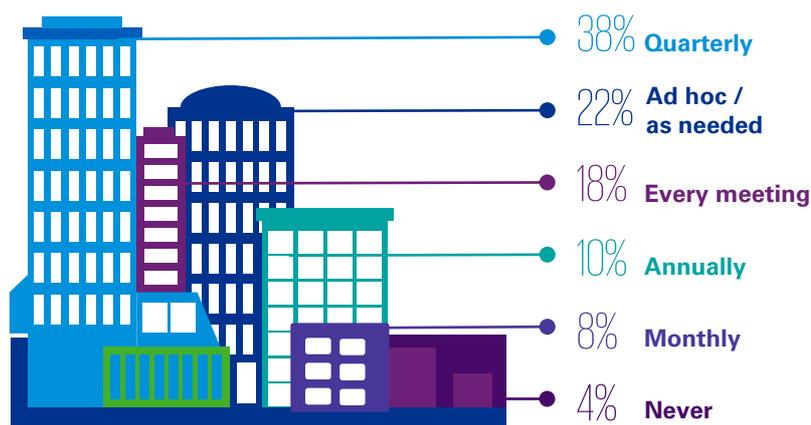
In South Africa King IV™, aimed at achieving good governance, stipulates that "the governing body should be responsible for tax policy that is compliant with the applicable laws, but that is also congruent with responsible corporate citizenship, and takes account of reputational repercussions". In many jurisdictions, tax authorities have also revised the penalties for non-compliance and in certain instances even introduced jail terms for key management personnel of defaulting organisations.

In view of the increased financial and reputational costs of non-compliance, companies need to consider the Board's governance over tax affairs as part of overall corporate governance and risk management strategy. As a primary requirement, companies should have a tax policy and/or tax strategy document which is approved by the Board and constantly reviewed to ensure that it is line with current realities.

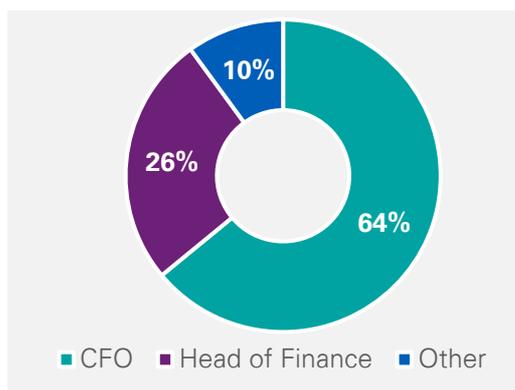
Furthermore, the Board may mandate the tax leader to provide regular updates on management of tax risks and any potential opportunities identified. This would also set the KPI agenda for the Tax Function.

## Board involvement in tax affairs

How frequent is tax on the agenda at board meetings?



To whom does the Head of Tax/Tax Function/person responsible for tax report?



## Documented tax strategy or tax governance policy

Does your organisation have a documented tax strategy or overarching tax governance policy document that covers tax risks, frames tax risk tolerance and instructs other departments on when to involve the tax department?

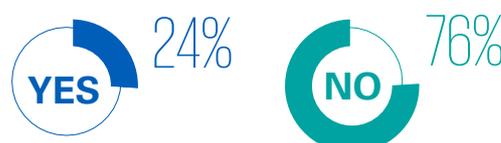


## Disclosure of tax strategy and policy

Does your company/group currently disclose any tax information publicly e.g. as part of your environmental, social and governance (ESG) approach or as a result of any regional legislative requirements or published best practice requirements?



Do you plan to move to more public disclosure of your tax information in future?

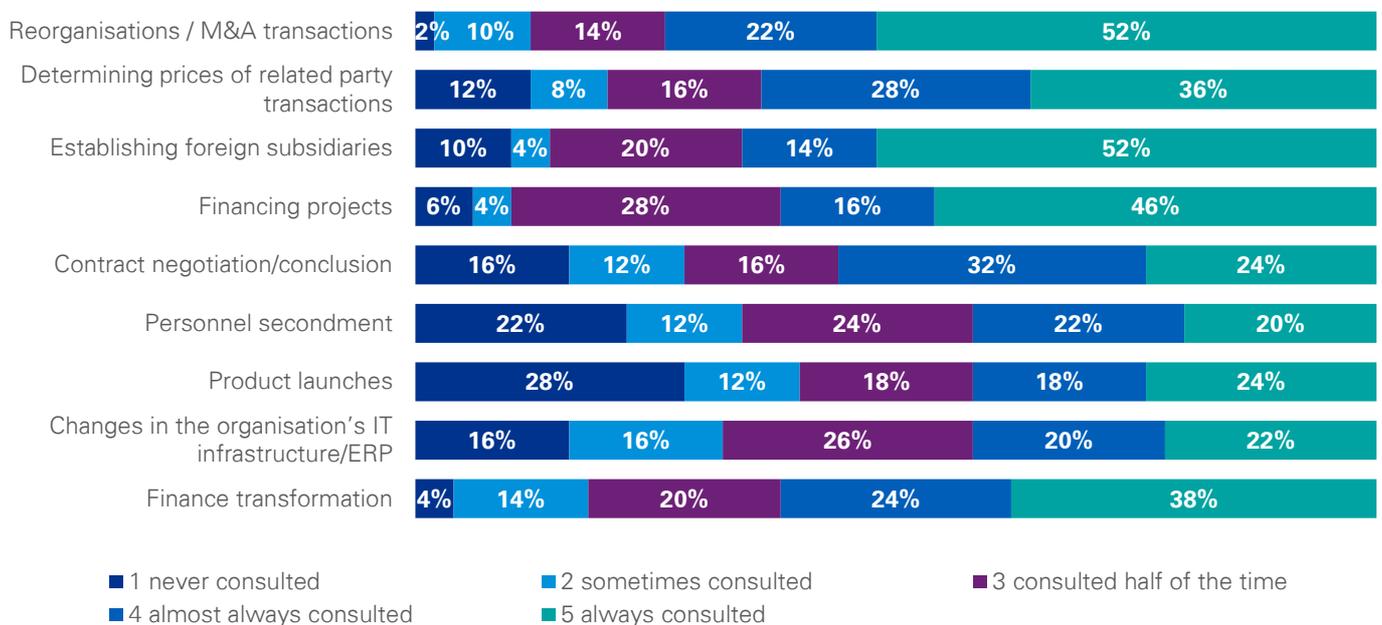


# Governance and Risk Management (cont.)

Participants confirmed that the Tax Function is often consulted by other areas of the business when executing significant transactions as indicated below. Although 42% and 62% of participants confirmed that they are “almost always” or “always consulted” in ERP changes and finance transformations respectively, we need to reflect on the remaining Tax Functions that are not consistently involved in such projects. With tax authorities across the region stepping up their focus on data and real-time reporting, Tax Functions should act accordingly. Tax is not often able to independently motivate investment in transformation projects. However, if these projects are already in the pipeline early involvement of tax could be a significant value-driver to the business overall as well as driving the objectives for a future-ready Tax Function.

## Consultation with the Tax function

In practice, how often is the Tax Function (or person responsible for tax) consulted before the execution of significant projects/transactions (where 1 = never consulted and 5 = always consulted)?, such as:



## Key Considerations

The Board should have visibility over the tax affairs of the company at all times. The tax governance philosophy of the company should:

- Derive from the overall business strategy
- Communicate a tax risk policy aligned with the company's overall business risk policy
- Be unambiguous, agreed and supported by the Board
- Clearly outline the company's policy on tax planning and related processes and controls

By having such a strategy in place:

- Investors will be assured that tax is managed consistently in support of business strategy and appetite for risk
- Regulators and tax authorities will be assured that tax is managed ethically, with robust processes and controls
- Boards, audit committees and senior management will be assured that the business is not overpaying tax and is meeting its legal obligations

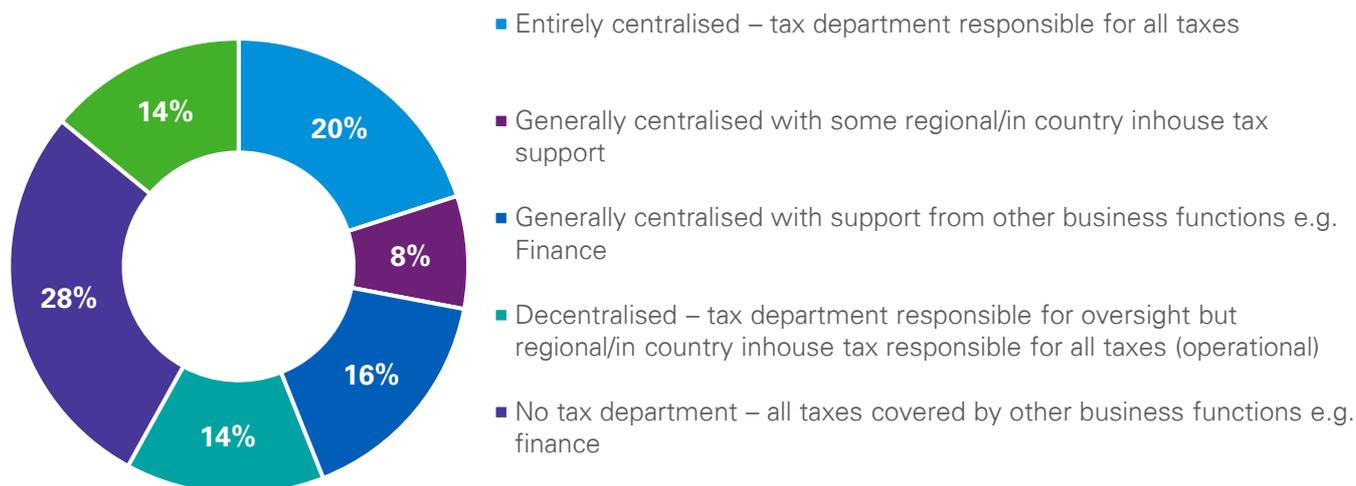
# Organisational Model

## Current operating model

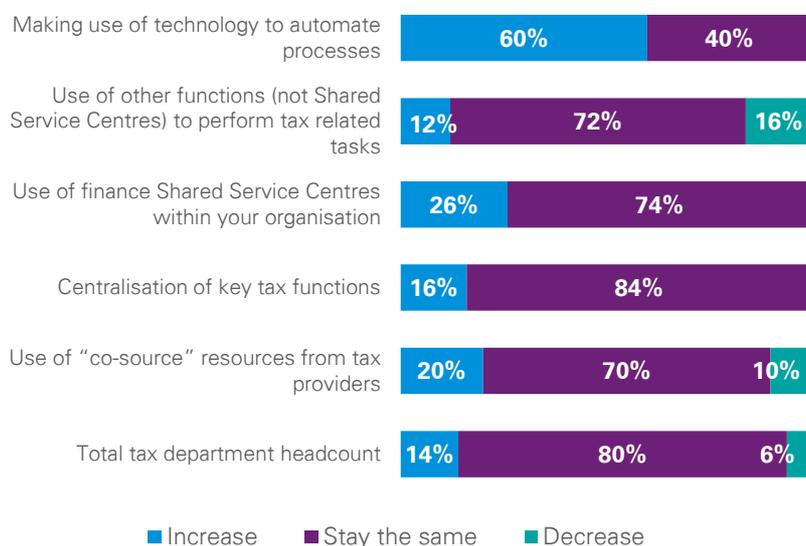
The organisational model considers how the Tax Function is setup to do what it does. The survey results show that Tax Function reporting is mostly centralised within the Finance Function, thus structuring of tax input would either align or be integrated with overall financial reporting . Currently the tax responsibilities are most often the sole responsibility of the Tax Function or entirely performed by the finance team. Decentralisation is mostly driven by the need for in country tax specialists.

However, in view of the dynamic operating and regulatory environment, companies (especially multinational companies) are actively re-evaluating their tax operating models as part of their risk management strategies. For instance, some multinational companies are adopting the hybrid/co-sourcing models to manage compliance in various jurisdictions/ subsidiaries, instead of using centralised offshore teams.

Looking ahead most Tax Functions anticipate no change in headcount, but plan to invest in the use of technology and automation of processes (60%), enabling the team to do more with less and freeing up time for value adding activities. There is also an expectation that the use of finance shared service centres will increase by 26%.



## Changes in resource model



### Key Considerations

Business and tax leaders need to evaluate and select the operating model that aligns to their tax strategy, risk and business needs of the organisation.

A detailed cost benefit analysis of each model would be necessary when developing the business case for change.

# Process and Responsibility

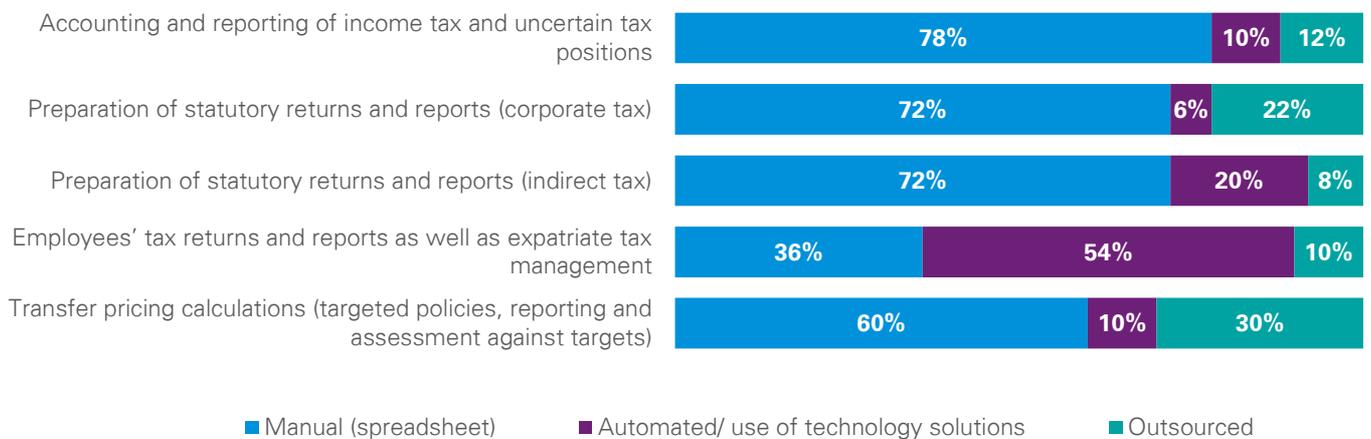
Tax processes, responsibilities and controls have to align to the documented tax strategy and tax policy of the organisation. Consequently, as the tax strategy and tax risks of the organisation evolves, processes need to be reviewed and enhanced accordingly. This would enable proper identification and management of risk, and it would improve overall efficiency.

While traditional process improvement techniques such as the Lean Six-Sigma Tool are still used to identify and eliminate inefficiencies, an increasing number of process improvement initiatives are intrinsically linked to the application of technology. As mentioned earlier involving the Tax Function in larger business and finance transformation projects should result in significant benefit for the Tax Function and larger business.

From the survey results it is clear that the majority of tax processes are still performed manually. Employees' tax being more automated than most and transfer pricing outsourced most often. The results talk to the tasks that the Tax Function regard as most time consuming. The more manual procedures involved, the more time consuming the process. Good examples are tax reporting for Annual Financial Statement purposes and preparation of income tax returns. Most regard VAT compliance as moderately time consuming with a number of organisations spending less time on Employees' tax due to greater automation in the particular process.

62% of participants indicated that responding to SARS queries and audits were either very or most time consuming. The manual, time consuming processes are clearly where the most benefit will be obtained from streamlined processes, automation and technology solutions.

## Execution of tasks



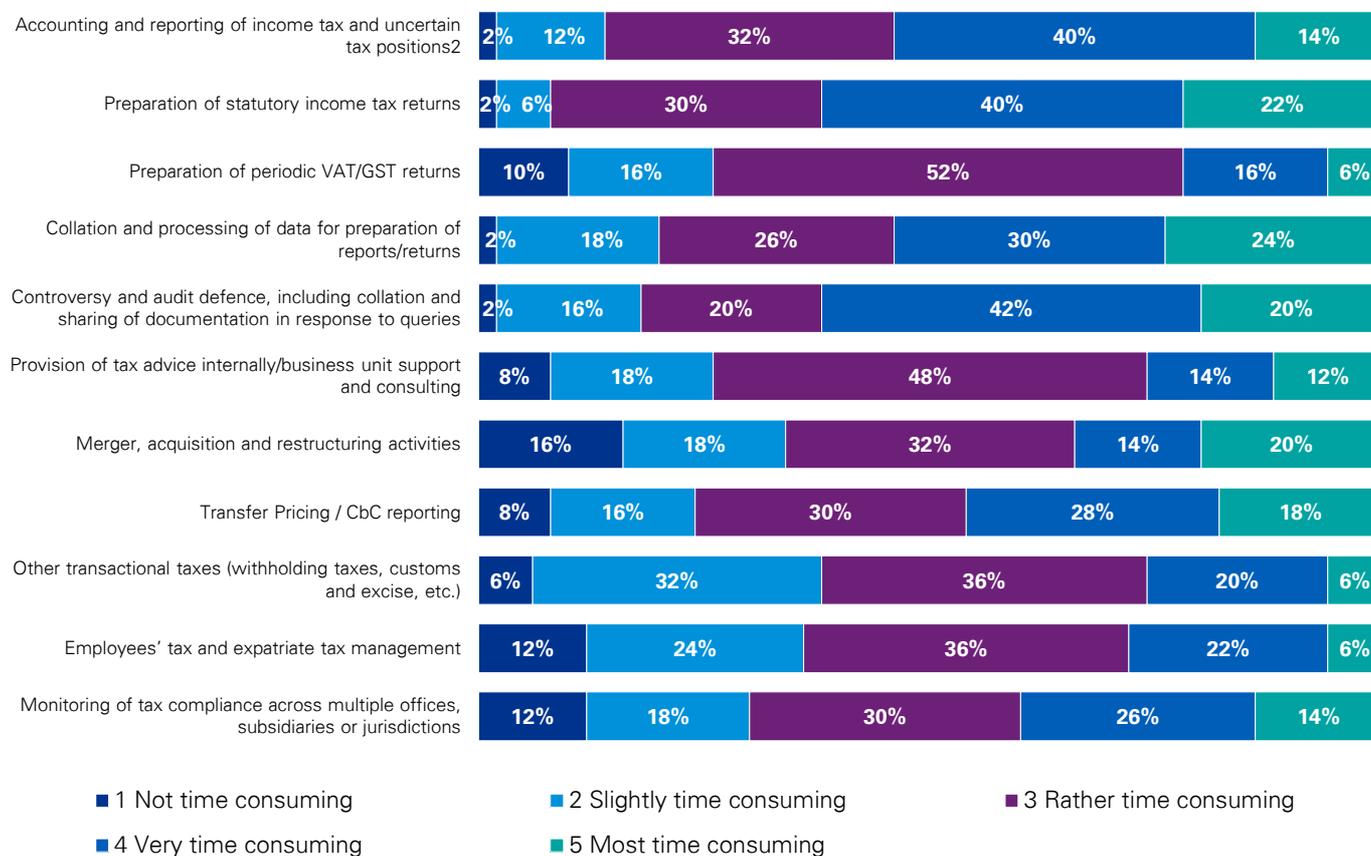
*Back office roles have always been challenged to do more with less, and tax is no different.*

*Today, we see many tax departments working to automate repetitive processes and outsource standard compliance activities in order to focus more on the value-add aspects of the Tax Function.*

*When done right, their tax professionals can concentrate on interpretation and analysis, decision making and strategy, leveraging their deepest skills and adding more value to the business.*

**Sean Bloodwell**  
Head of Global Compliance Management Services KPMG International

## Time to complete tasks



## Key Considerations

- The number of tasks and processes currently being performed manually, and the limited personnel in the Tax Function provides a compelling case for automation or outsourcing of low value compliance activities.
- A detailed workload and process assessment may be required to ensure that responsibilities are properly assigned within the Tax Function.
- A workload assessment would provide basis for evaluating the optimal delivery model for the Tax Function, i.e., whether to continue to centralise, co-source or outsource fully.
- Responsibilities should be allocated to the available resource(s) on a 'best-fit' principle so as to properly manage the people component of the operating model.

# Data and Information

The role and expectation of the Tax Function has expanded beyond traditional compliance management to include strategic business support.

The Tax Function receives significant information and data from all areas of the business and can transform the data into valuable business insights. However, the quality of the insights produced is directly proportional to the quality of the data received. The features of quality data include accuracy, completeness, consistency, recency availability and security.

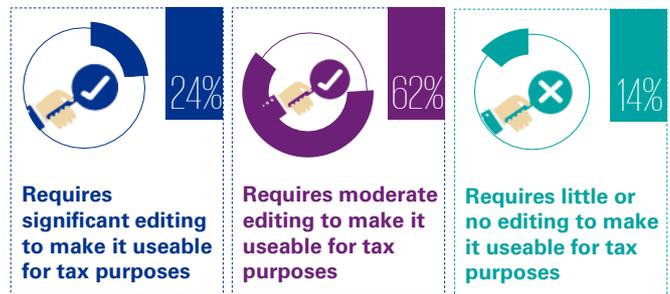
Therefore, data and information received by the Tax Function should be assessed for these qualities before it is used for analysis. Also, the availability of quality data would eliminate or reduce the significant time spent by the Tax Function cleaning or processing data for tax returns preparation.

In addition to quality of data, the Tax Function should have the capability to analyse and process the data to generate useful insights. This will simplify and accelerate the process to identify tax risks and opportunities. Therefore, the Tax Function would need to acquire data and analytical skills (as tax authorities are also doing across the region).

Currently only 14% of participants indicated that data require little to no editing and it is clear from responses that data management and application requires improvement and will be a focus going forward.

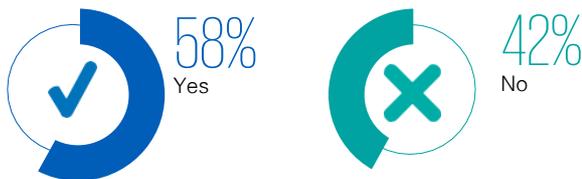
## Quality of data received for tax purposes

Data generated from the ERP



## Location of data for tax purposes

Data required for tax analysis is centralised and easily accessible?



## Use of data generated for tax

Is tax data used to generate business insights for decision making? Or only used for preparation of tax return/report?



## Key Considerations

- With automation, companies can eliminate the manual collation and processing/cleansing of data/information received.
- While many ERPs are enabled to provide the data required for preparation of tax returns, a few might have some built-in data analytics capabilities. Based on our experience this is very limited and the Tax Function should invest in sophisticated data analytical tools and skills to support predictive, diagnostic and prescriptive analytics.
- In view of the tax authorities' plan to implement technology for real-time transaction data collection, tax leaders, in conjunction with their IT teams, should review the tax rules and codes in the ERP and financial systems (determination rules). The enhancement and implementation of appropriate processes and controls will increase reliance on quality data (ensuring optimal use of systems that is imperative for real-time reporting).

# People and Capabilities

People are central to the success of any transformation initiative. The Tax Function needs to have the right people to implement the governance, data, technology, organisational model, process and evaluation strategy. Therefore, tax leaders need to take ownership of the people agenda for the Tax Function.

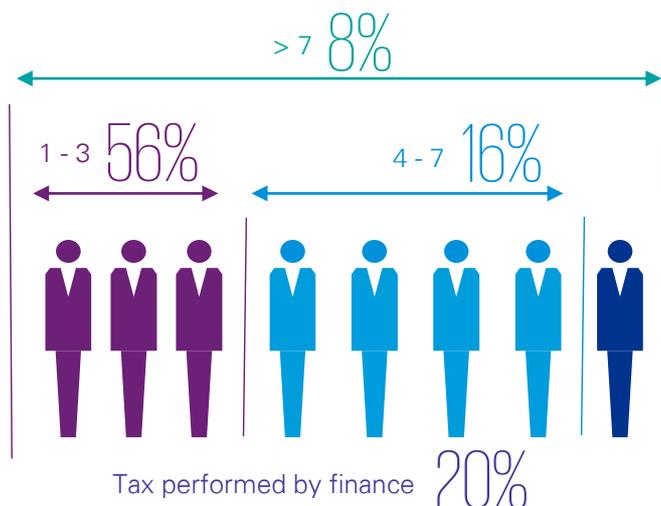
Despite the high unemployment rate in Southern Africa, tax talent is in limited supply. Therefore, to attract and retain the right talent, tax leaders should develop an effective talent management strategy. The strategy should include the provision of attractive career growth plans, regular training opportunities and an effective and objective evaluation system.

In the region 56% of the participant Tax Functions have 3 or less FTEs with finance teams performing all tax responsibilities for 20% of the organisations. It is thus imperative that individuals responsible for tax have the appropriate skills and tools to ensure maximum efficiency.

The evaluation metrics should align with the expectation of the Board from the Tax Function and can be used to evaluate the contributions of the Tax Function to the business. For the majority of participants KPI's are focussed on accurate and timely compliance as well as appropriate management of tax risk.

## Average number of FTEs in the Tax Function

What is the size of the Tax Function by headcount?



## Evaluating the performance of the Tax Function



# People and Capabilities (cont.)

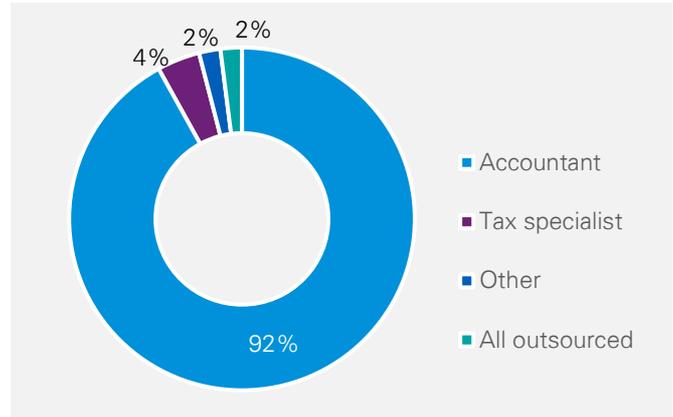
## Qualification/skill-set of personnel in Tax Function

Currently most Tax Function personnel are accountants that have specialised in tax or with tax responsibilities. The tax professional of the future will require multiple new skills including; communication, negotiation, data analytics and technology, tax technical and economic analysis.

Along with investment in technology and process automation tax authorities in the region are also investing in different skills.

As part of their strategy SARS is hiring and upskilling their current employees to be tax professionals with data analytics skills, technologically inclined and focussed on service and relationship management.

What is the typical qualification/skill-set of personnel in your Tax Function?



### Key Considerations

- The headcount analyses shown above may indicate that personnel in the Tax Function are fully utilised. Therefore, it may be important to conduct a detailed workload assessment in order to determine the task allocation and where reallocations may be required.
- Furthermore, the analysis provides a compelling basis to re-evaluate the current organisational model of the Tax Function with a view to establishing the right sourcing model.
- The evaluation matrix for the Tax Function should emphasise other value related KPIs, e.g. tax savings achieved or new opportunities identified for the business.

# Systems and Technology

A technology enabled Tax Function can leverage insights and process solutions to deliver value to the business.

Although 60% of participants anticipate increased investment in and use of technology to automate tax processes only 52% of participants have a strategy for the adoption and application of such technologies. The adoption of technology in the Tax Function should be targeted at specific needs. However, the process of transforming the Tax Function technologically should be done incrementally. It requires careful planning and many iterative steps to arrive at the desired state.

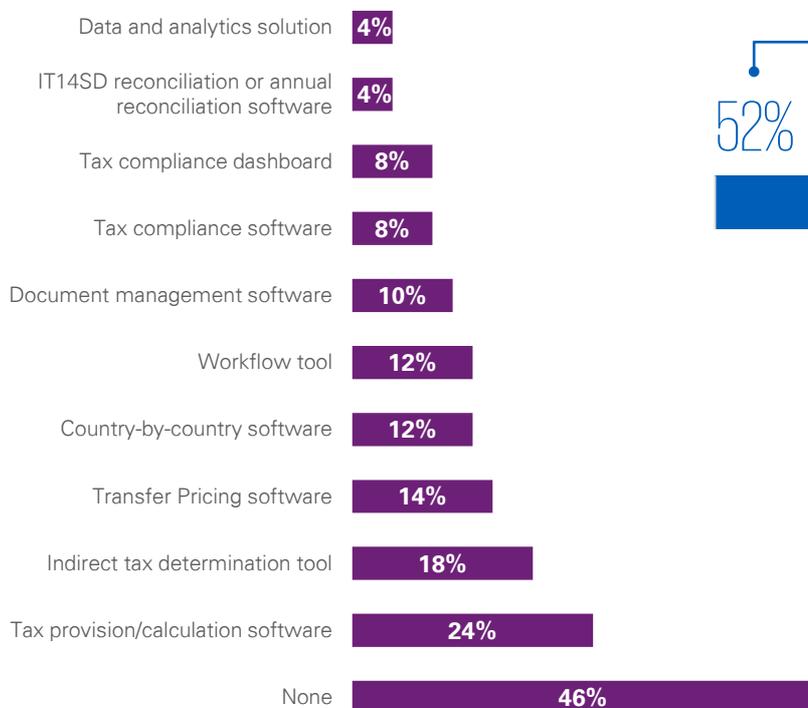
Despite the obvious benefits of technology adoption, obtaining investment for tax technology solutions can be a challenge. Investment in technology solutions (including tax technology) requires a persuasive business case. One accelerator in motivating investment in tax technology is the level of technology maturity of the tax authorities.

Currently 46% of participants do not use any tax related software, this is supported by the level of manual processes highlighted earlier.

However, from the responses regarding anticipated technology changes over the next 3 years nearly half of the participants intend to increase tax related system enhancements.

## Tax technology tools used by the Tax Function

Which tax-related software is currently used by the Tax Function?



## Tax technology strategy

Does your organisation's tax strategy include a strategy for the adoption and application of technology for tax processes:



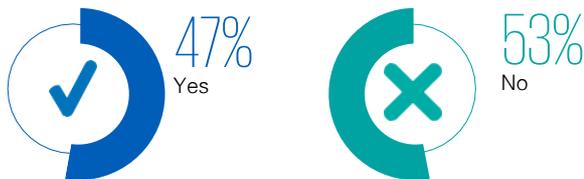
# Systems and Technology (cont.)

52% of respondents indicated that technology cost outweighs the visible benefit and 24% indicated that they are unable to obtain the data to justify the spend. Taking into account the pace the rest of the organisation is evolving at (finance transformation and other business transformations) and Tax Authority investment in digitisation and automation, more will have to be done to verbalise and demonstrate the business case for investment in tax technology. From our global experience, the more advanced the Tax Authority, the more compelling the business case for investment in tax technology.

The drive by SARS and other tax authorities in the region to automate tax administration and move from return based risk assessments to data driven risk assessments, should provide a compelling business case for investment in process automation and tax technology by companies.

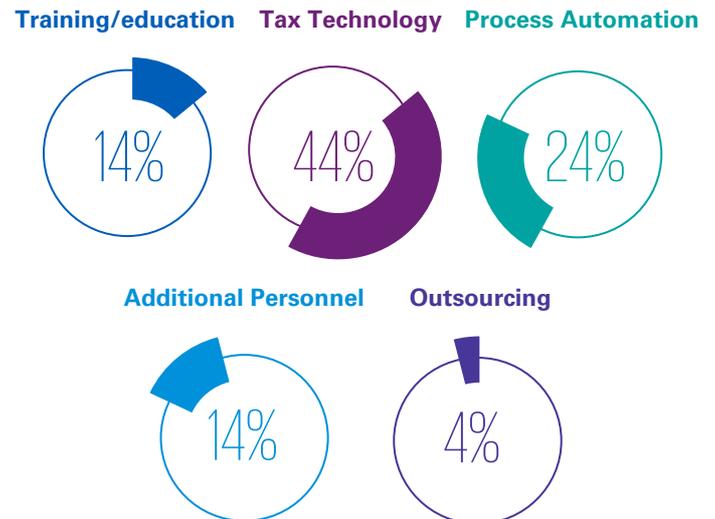
## Technology adoption in the Tax Function compare to other Functions of the business?

Is the level of technology adoption in the Tax Function at par with the level of technology adoption in the other functions of the business (finance, sales & customer care, etc.)?



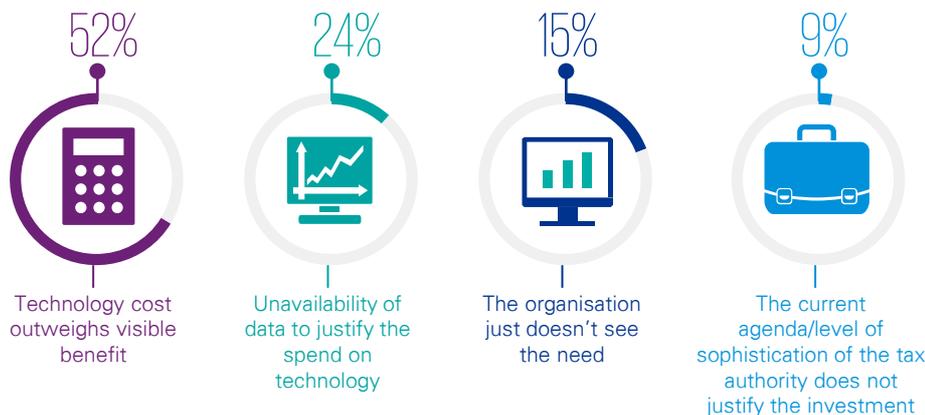
## Investment in technology

If you received budget to increase investment in one key area of you Tax Function, in which of the following would you invest?



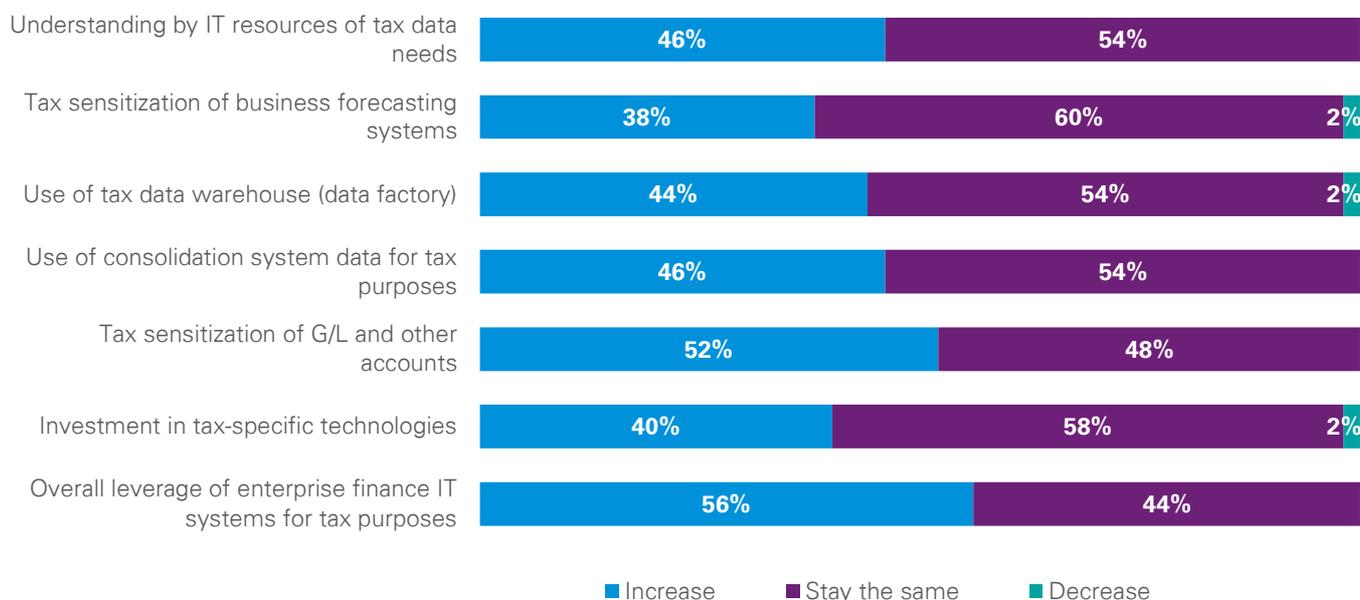
## Limitations against investment in technology

Which of the following reason(s) limits investment in technology for the Tax Function in your organisation?



## Anticipated technology changes over the next 3 years

What technology changes do you anticipate in the systems that support tax information in the next three years?



### Key Considerations

- The tax strategy and tax policy documents should include the adoption of technology for efficiency and for the identification and management of opportunities and risks
- When building the business case for investment in tax technology, it may be important to align the impact of the technology with the organisation's overall objectives. These objectives could include improved risk identification and management, efficiency gains, realisation of tax savings and responding to technology developments made by the tax authorities.
- Considering the disparate adoption of technology across the business, the Tax Function would have to collaborate with other functions to leverage their use of technology whilst seeking to drive its own technology initiatives.
- There is a huge dilemma for Tax Functions that are not planning on moving to a more optimised and automated operating model. This would cause the Tax Function to fall behind the curve and not being able to meet the increased demands from its various stakeholders and proactively driving the management of its tax affairs. Ensuring the right level of accuracy, completeness and quality.
- A company in a position to win with tax is one that uses data as a core asset, places more value on the table for stakeholders and that is intentional and proactive in managing the organisations tax affairs.

# Next steps



# Next Steps

Every company is unique. Every Tax Function is too. A bespoke KPMG Tax Reimagined workshop gives you the opportunity to imagine the model that works for you then brings it to life.

Our rapid diagnostics and wealth of benchmarking data (including global, if necessary) can take you from dreaming of the possible to the foundations of a tangible business case in less time than you think.

Continue the conversation by contacting us. Together, let's prepare to meet the future of tax.

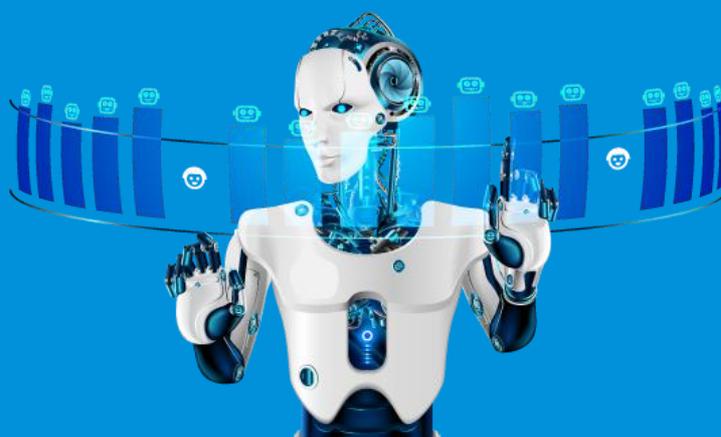
**Due to the positive responses received regarding our survey we've decided to keep it open.**

**Please let us know if you wish to receive the link to our Survey.**

**This only takes 10 minutes and should provide valuable insights with long-term benefits to meet your goals.**

## Investing in transformation

Across the KPMG organisation, we are investing US\$5 billion over five years in technology, people and innovation to accelerate the digital transformation of KPMG firms and our clients, with more than US\$1 billion being invested in tax & legal technology specifically through that period.



## Something new

KPMG uses Digital Gateway to deliver on numerous forms of outsourced engagements. It is a global technology platform that brings multiple technology solutions together under one single umbrella. Covering global compliance process tracking, document repository to utilising sophisticated data & analytical capabilities for enhanced visibility and insights. Leveraging our frameworks and solutions such as Digital Gateway helps you to transform your business function for the modern demands you face, allowing time for growth value adding activities.

# Tax reimaged





# Tax Reimagined

**Tax is changing. We're changing Tax.**

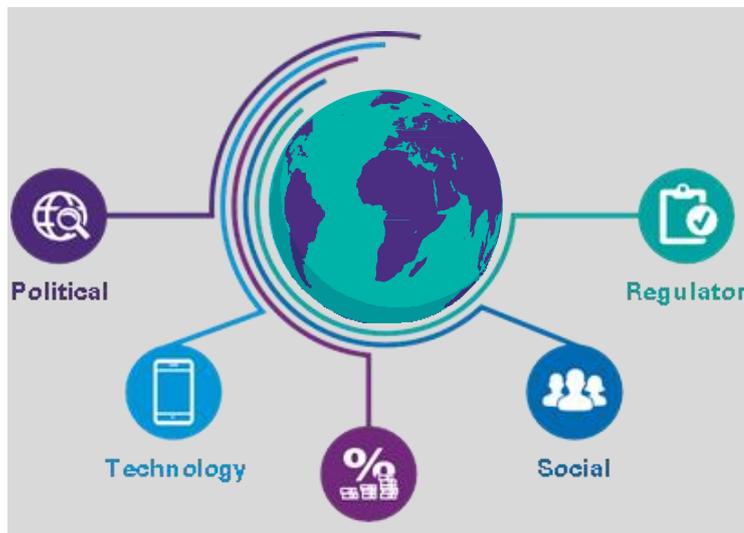


There is no shortage of challenges and opportunities facing today's tax functions. Carrying on as in the past is not a viable option. You need to be ready to be compliant and ready for the changing digital future of tomorrow. Tax is your license to do business. Tax Reimagined is the discussion you need to have now.

## The Challenge

The volume and pace of change in the tax environment is unprecedented. Complex and uncertain times need different tools and skills to manage the business of tax. Yet, investment has lagged behind. Your workload has increased while your resources have diminished. You need to not only be compliant today but ready for the digital world of tomorrow. Meanwhile the business continues to demand tax support. What's the answer?

## Global trends disrupting the Tax Function



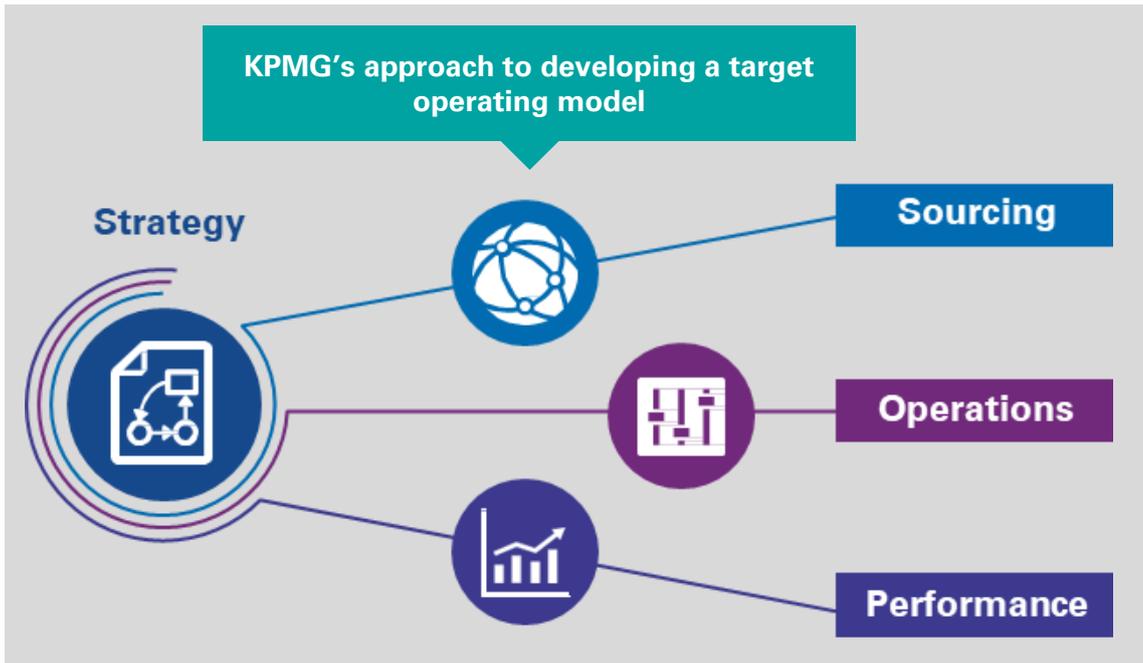
## The opportunity

At KPMG we have combined our technology, transformation and compliance capabilities under a new framework — Tax Reimagined. Deploying our solution architects and leveraging this framework, we can help you develop a strategy for your tax function and design a target operating model to help ensure execution, reduce costs, improve quality and unlock value from your tax and statutory function.

These days, tax makes headlines. This is the impetus to shift the conversation, to lay the foundation of an irresistible business case for investment in tax infrastructure.

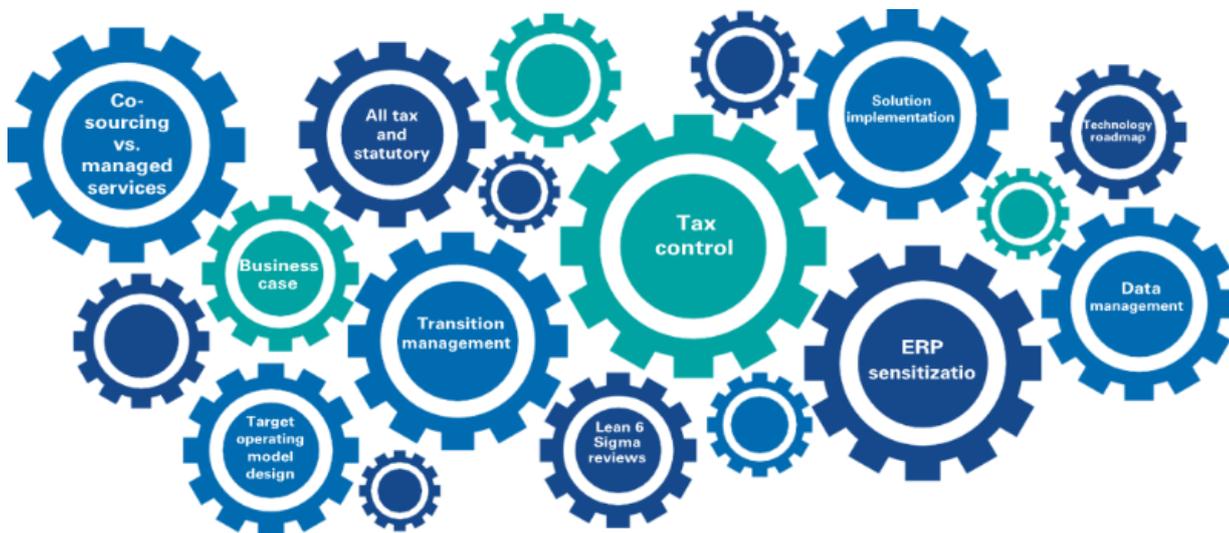
This takes the form of new tax operating models, technology tools and capabilities which are more adaptable and configurable to tax needs and flexible new ways of approaching sourcing.

For example, large scale finance transformation projects and disruptors like emerging technologies means tax functions need new ways of working which, in turn, can also embed continuous improvement for sustainable change.



## Tax Reimagined in Practice

KPMG's Tax Reimagined solution architects collaborate with you to bring tax expertise, a deep understanding of technology and innovative operating model designs to work alongside you to reimagine your tax function. This will involve designing a target operating model that combines transformation, with the right blend of managed services and technology to help the gears of your business work together to accomplish your goals.



## Case study — a global pharmaceutical company

A global pharmaceutical company with a presence spanning over 95 countries needed help to develop a new tax operating model. The high cost of compliance and escalating regulatory challenge needed new thinking. The in-house compliance team was not well integrated into the finance function and the cost of investing in new tax technology infrastructure was considered too high.

Using our Tax Reimagined approach, we helped the client determine their optimum delivery model and provided the necessary challenge to build the business case for change.

Today the client operates cost-effective, globally standard tax compliance processes. We successfully transitioned their compliance team into the supportive environment of the KPMG Centre of Excellence. Tax leadership benefits from rapid global visibility of risks and issues and new insights and value from its data. Together, we have future-proofed their compliance processes.

## Next steps

Every company is unique. Every tax function is too. A bespoke KPMG Tax Reimagined workshop gives you the opportunity to imagine the model that works for you then brings it to life.

Our rapid diagnostics and wealth of benchmarking data can take you from dreaming of the possible to the foundations of a tangible business case in less time than you think.

Continue the conversation by contacting one of our solution architects. Together, let's prepare to meet the future of tax.

<h3>Coverage</h3>  <p>95+ countries</p>	<h3>The challenges</h3> <ul style="list-style-type: none"> <li>➔ Escalating cost of tax compliance</li> <li>➔ Technology investment cost prohibitive</li> <li>➔ Increasing regulatory demands including transparency and direct access to tax data</li> <li>➔ Talent attraction and retention under pressure</li> <li>➔ Variability of processes and operating models</li> <li>➔ Lack of standardization creating inefficiencies and risk</li> <li>➔ Unable to leverage technology effectively</li> </ul>	<h3>Our approach</h3>  <ul style="list-style-type: none"> <li>Conducted a worldwide deep dive of compliance operating</li> <li>Worked in partnership to develop a business case for change</li> <li>6 Sigma methodology to standardize processes</li> <li>Devised a people strategy to optimize resources and define future skills</li> <li>Built a transformation business case with a clear return on investment</li> <li>Applied KPMG's well-established tax technology to automate processes and improve data quality</li> <li>Devised and implemented a new operating model enabled by KPMG's Center of Excellence</li> </ul>
<h3>Tax Reimagined</h3>  <ol style="list-style-type: none"> <li>1 Significant reduction in the cost of compliance</li> <li>2 Single dashboard to provide oversight of tax reporting across all countries</li> <li>3 People transfer from company's statutory and tax teams to KPMG</li> <li>4 Improved KPI reporting</li> <li>5 High quality tax data that drives insights and business value</li> <li>6 Future proofed for the digitalization of tax authorities and reporting</li> <li>7 A leaner, more business focused retained compliance team</li> <li>8 Single accountability for all compliance activities</li> </ol> 		

# Contact KPMG



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