



cutting through complexity

Always one step ahead

KPMG Luxembourg annual
press conference 2014

10 February 2014





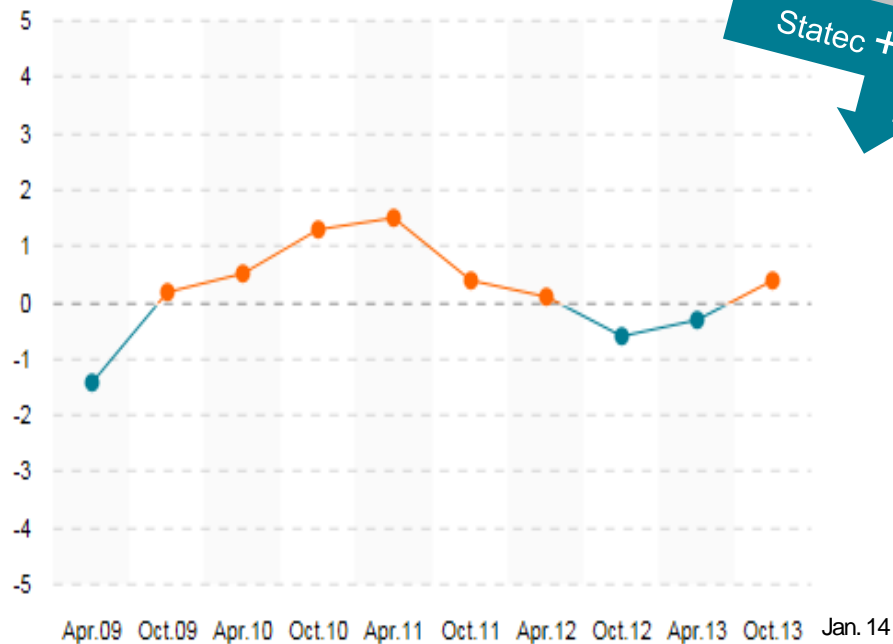
Always one step
ahead

Taking Luxembourg's pulse



**Luxembourg
Business
Compass**

by KPMG and Luxemburger Wort



The global megatrends

1

Demographics

2

Rise of the Individual

3

Economic Interconnectedness

4

Enabling Technology

5

Public Debt

6

Economic Power Shift

7

Climate Change

8

Resources Stress

9

Urbanization

Economic Interconnectedness



Impact on
Luxembourg

Challenges and
opportunities
for our clients



Trade and investment
continue to drive growth



Increasingly complex trade
and investment
relationships



Avalanche of regulation
continues as governments
attempt to mitigate risk of
contagion

The global megatrend for 2030
that is a reality for Luxembourg
in 2014.

Patrick Wies, [KPMG blog](http://kpmg.blog)
blog.kpmg.lu



Unlock opportunities in
increasing globalisation



Implement strategies to
manage regulation



#1 AIFMD
Reporting



Regulatory scout

EMIR – MIFID II - PRIIPS



Impact on
Luxembourg

Challenges and
opportunities
for our clients

If Big Data is the new
gold, could Luxembourg
be the perfect safe?

Luc Maquil, [KPMG blog](http://kpmg.blog.blog.kpmg.lu)
blog.kpmg.lu



Big data



Data privacy,
confidentiality and
security



Innovation



Mobile banking
Mobile payments
Digital content



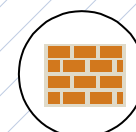
Crowd funding
Virtual currencies



Going social
Demographic shift



Digital Marketing Survey
KPMG Luxembourg's APP



ICT Luxembourg
ecosystem strategy map



kpmgregulapedia.lu



blog.kpmg.lu

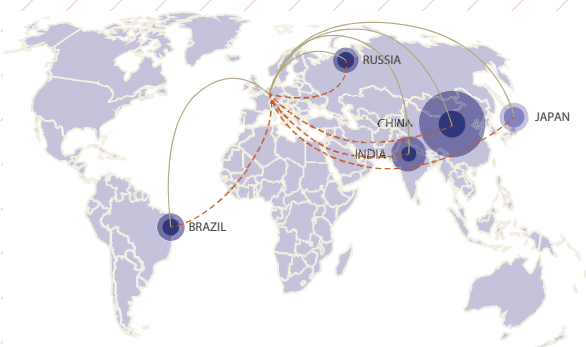


Economic Power Shift



Impact on
Luxembourg

Challenges and
opportunities
for our clients



Luxembourg needs to keep an eye on its Asian counterparts as well as making its voice heard in international negotiations. If it fails to do this, there will surely be pretenders to the throne.

Patrick Wies, [KPMG blog](http://blog.kpmg.lu)
blog.kpmg.lu



Expanding business
to new horizons



Innovation as the source
of sustaining growth



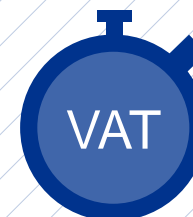
Meeting cultural
challenges



Building a reputation
and relationships with
emerging economies



Local desks
for global clients
Russia – China - Japan



Worldwide Competence Centre
Global VAT Refund
Automated Service



KPMG Global network



الغرفة التجارية العربية البلجيكية اللوكسمبورجية
Arab-Belgian-Luxembourg Chamber of Commerce





Facts and figures



Share of gross revenue

Advisory **+6%**

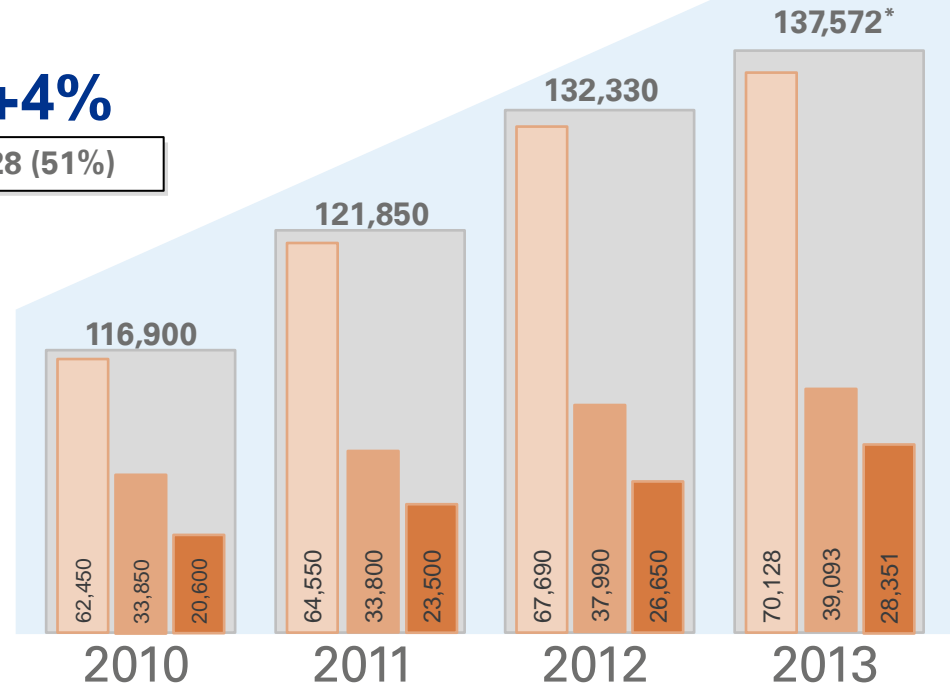
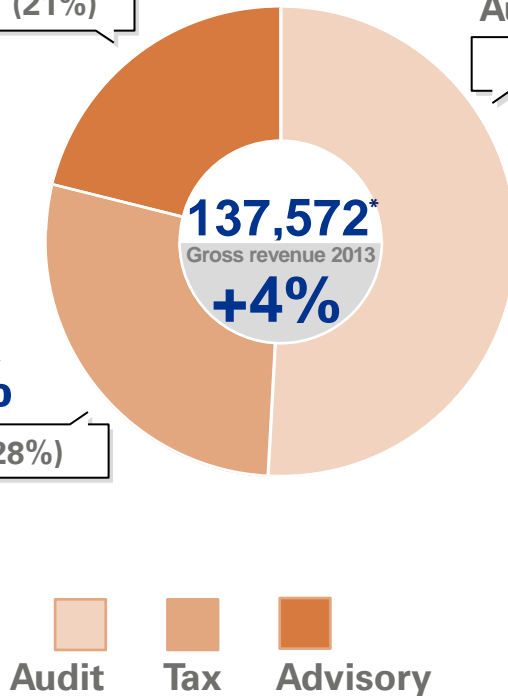
28,351 (21%)

Audit **+4%**

70,128 (51%)

Tax **+3%**

39,093 (28%)



*figures based on Transparency report Luxembourg (December 2013)





293
Newcomers

291
Promotions

8 Directors

6 Partners

1199
Employees

(2007) 745

1199 (2013)





The KPMG Luxembourg Foundation

- Total donations of EUR 230K

Community projects

- Alupse Strategy Project
(Staff Selected Charity)
- Re-establishing Ile-aux-Clowns
- Project 5 (and other sports challenges)
- Fundraising (Valentine's Day bake sale, Movember, Christmas Cards, etc.)
- Volunteering Programme



CSR Report





cutting through complexity

KPMG Luxembourg Foundation

Charities Sponsored in 2013*



*The KPMG Foundation also sponsored KPMG staff in charitable fundraising and sports events. Learn more about our Foundation's donations to charitable associations, our staff activities and why it matters to us!



Thank you for your attention



Thomas Feld
COO



Emmanuel Dollé
Head of Audit



Georges Bock
Manager Partner



Sébastien Labbé
Head of Tax



Alain Picquet
Head of Advisory & Markets





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