



cutting through complexity

Always one step ahead

KPMG Luxembourg annual
press conference 2014

10 February 2014



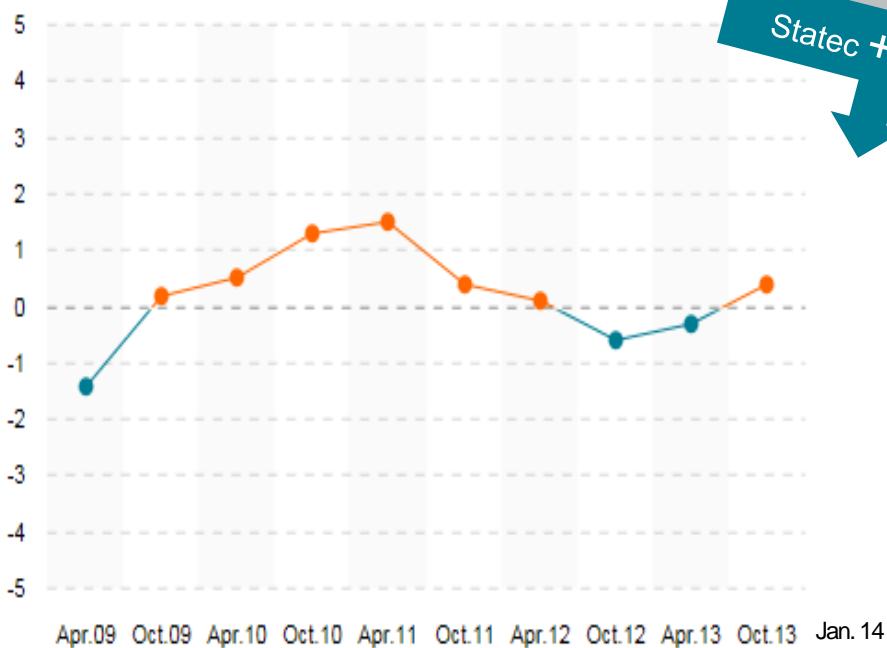
The background of the image features a complex geometric pattern composed of overlapping triangles. The triangles are primarily in shades of blue, ranging from light lavender to deep navy, and are set against a white background. The pattern is dense and covers the entire frame, creating a sense of depth and motion.

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



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.

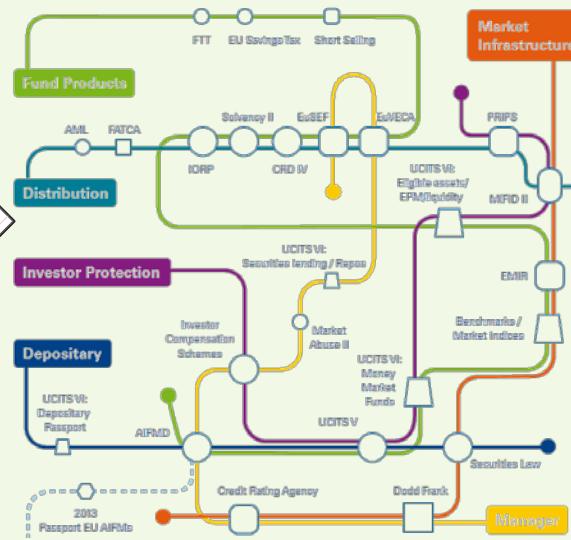
Patrick Wies, [KPMG blog](http://blog.kpmg.lu)
blog.kpmg.lu

Impact on Luxembourg

Challenges and opportunities for our clients



Unlock opportunities in increasing globalisation



Implement strategies to manage regulation



#1 AIFMD Reporting

1
2
3



Regulatory scout

EMIR – MIFID II - PRIPS

Enabling Technology



Impact on Luxembourg



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

Luc Maquil, KPMG blog blog.kpmg.lu

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Big data



Data privacy,
confidentiality and
security



Innovation



Mobile banking
Mobile payments
Digital content



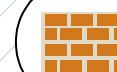
Crowd funding
Virtual currencies



Going social
Demographic shift



Digital Marketing Survey
KPMG Luxembourg's [APP](#)



ICT Luxembourg
ecosystem strategy map



kpmgregulapedia.lu



39 Kennedy
AVENUE
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



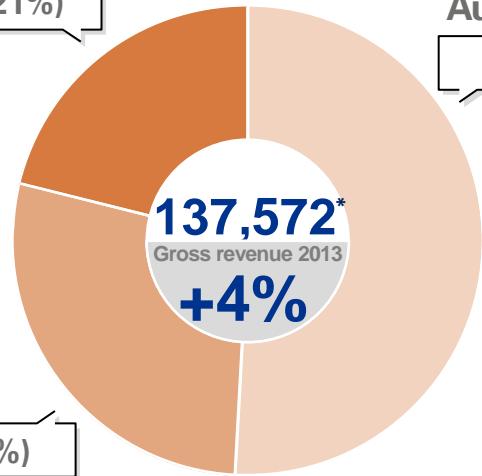
Facts and figures



Share of gross revenue

Advisory +6%

28,351 (21%)



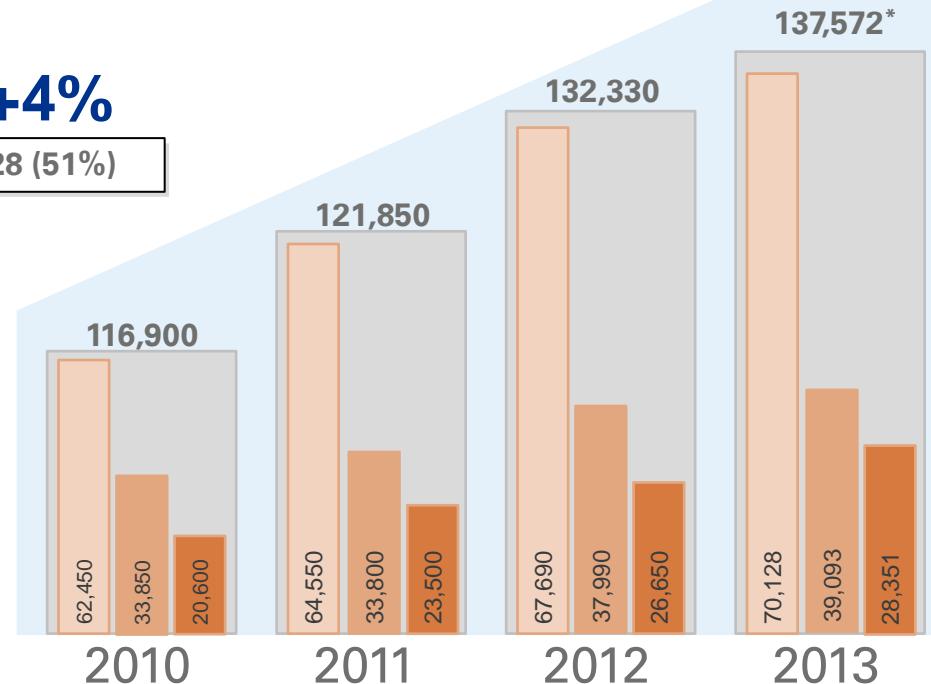
Audit +4%

70,128 (51%)

Tax +3%

39,093 (28%)

 Audit
 Tax
 Advisory



*figures based on Transparency report Luxembourg (December 2013)

39, Avenue Kennedy



Our staff



293
Newcomers



Our Awards in Luxembourg



Commitment to our Communities



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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