PwC Africa Cloud Business Survey 2023

Unlocking the transformational power of cloud in Africa

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The transformational power of cloud in Africa

In a landscape of rapidly advancing technology, CEOs in Africa are strategically positioning their investments to secure a competitive advantage through emerging technologies, including generative AI, advanced analytics and industry cloud. **Among these, the linchpin for optimising value is cloud transformation**.

When it comes to cloud transformation maturity, our survey reveals that organisations in Africa are at a turning point. Those that have already started their cloud journeys need to accelerate and refine their approaches; those that have not are quickly falling behind.

Cloud adoption is a strategic imperative for African organisations, driven primarily by the need for agility, scalability and sustained innovation. So far, progress has been gradual, but with increasing pressure from clients, customers, partners and competitors, most organisations now need to accelerate their plans to develop or implement new cloud-based solutions.

The availability of hyperscaler capabilities has been a game-changer, facilitating rapid processing, data storage and cost efficiency. Furthermore, the need to process ever-increasing amounts of data has necessitated the adoption of cloud solutions.

Despite some progress in cloud adoption in Africa, organisations still face numerous region-specific challenges such as budget constraints, skills shortages, cybersecurity risks as well as navigating the changing regulatory landscape on crucial topics like data sovereignty.

African organisations must strike a delicate balance between economic considerations, skills development and the strategic development of their technological infrastructure. This transformation is not just a technological shift; rather, it is a mindset and culture shift actively propelled by customers, employees and other stakeholders.

In our survey, we engaged with business and technology leaders in Africa to assess their organisations' progress with cloud adoption. The report focuses on:

1. Why African businesses are adopting cloud and their levels of maturity, benefits, changing stakeholders and barriers;
2. Five key actions cloud-powered organisations are taking to deliver value, including a comparative analysis; and
3. Lastly, we conclude with how African organisations can benefit from industry cloud solutions.

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Advanced technologies open exciting new possibilities and cloud adoption is a prerequisite for success. African businesses are ready to make the leap, beyond a mere ‘lift and shift’.

The urgent case for cloud transformation in Africa

Driven by the imperative to enhance experiences for both customers and employees, companies are feeling an urgent need to transition to the cloud. The appeal of the cloud lies in its promise of scalability, elasticity, optimised resource allocation and its role as a catalyst for fostering innovation, advanced technology and agile practices.

> As businesses across EMEA and Africa prioritise their transformation journeys, the cloud is a key enabler. This shift is crucial in a landscape where agility, productivity, and innovation are not just value-adds but necessities for competing in a globally connected market. Progress towards cloud adoption may require a phased approach, considering existing infrastructure and the need for upskilling, but the end goal is clear: leveraging cloud scalability and innovation to meet diverse business needs while managing costs effectively.

Mark Allderman
Cloud and Digital Leader

Our survey shows that organisations across Europe, the Middle East and Africa (EMEA) are prioritising and pursuing large-scale migrations towards new technology platforms, and African organisations in particular are opting for a more iterative approach.

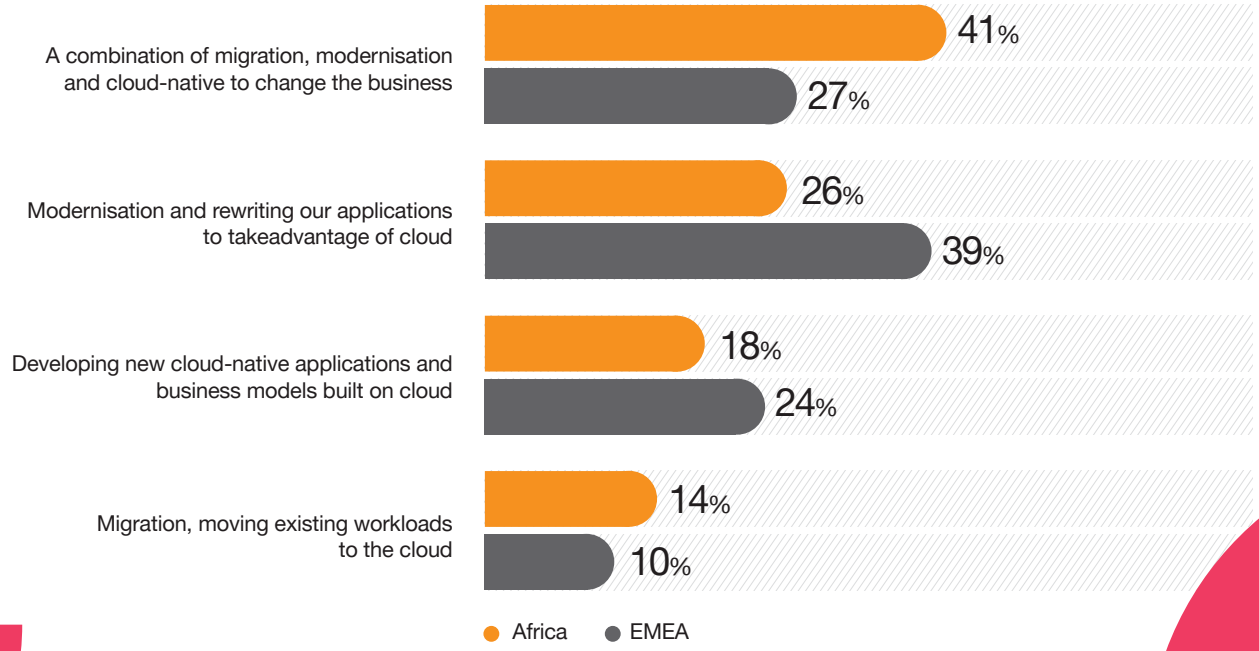
In Africa, many organisations are going beyond a mere 'lift and shift' with over 40% focusing on a combination of migration, modernisation and cloud-native development to change their businesses. Whereas in EMEA, modernisation is often the first step in adopting cloud to enable real enterprise-wide transformation.

Migration remains relevant as many leaders are faced with considerations about their existing investments in hardware infrastructure and data centre assets. Maximising the value of these assets might not involve an immediate replacement of all existing components.

Modernisation may have similar cost saving drivers as migration, but there are additional benefits including:

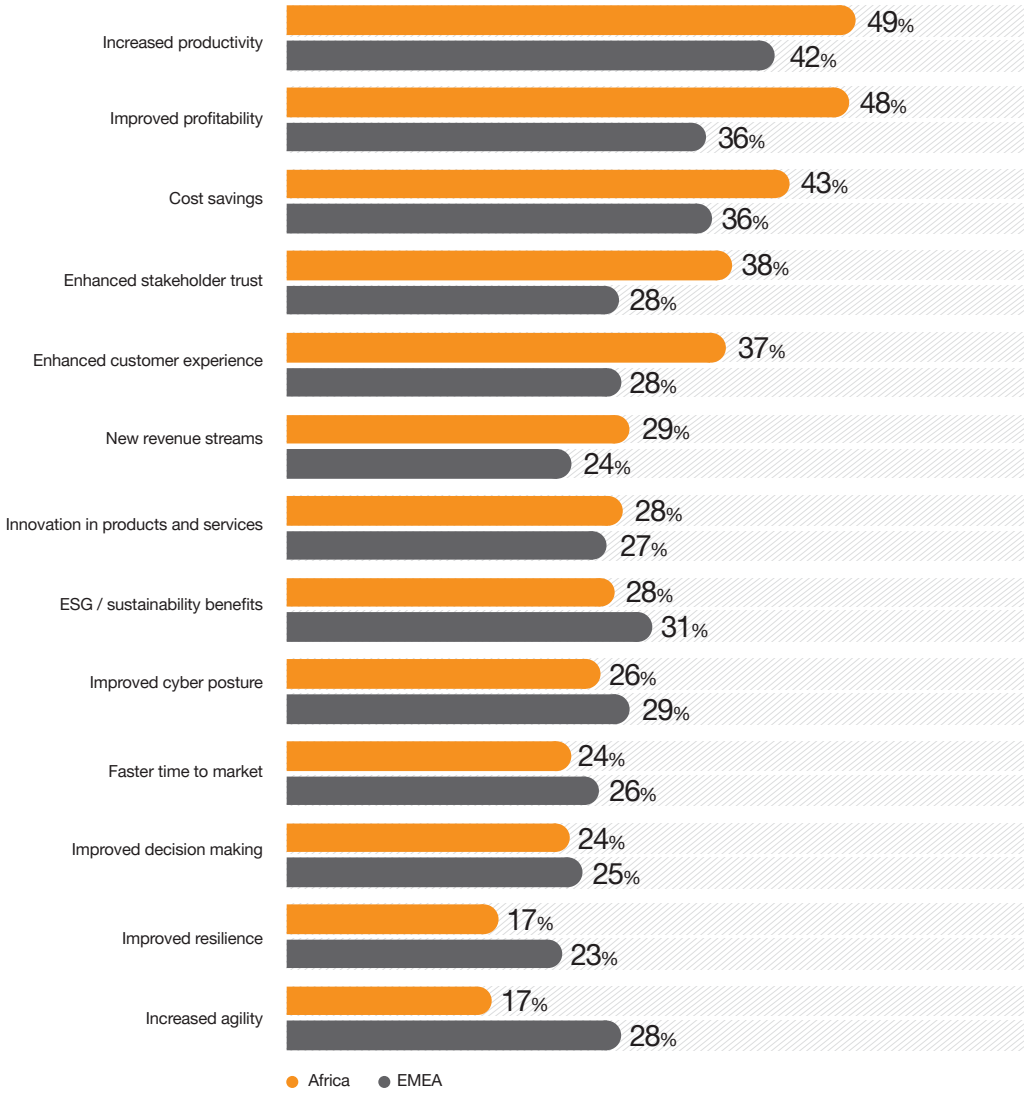
- license agreements that come standard with many cloud services,
- greater flexibility in the consumption of cloud infrastructure and applications, since these are often tied to seasonal increases/decreases of business usage,
- the ease of use of cloud native technologies, allowing businesses to get more out of all the features that come standard and
- more opportunities for business and technical users to make use of cloud technologies than a pure 'lift and shift'.

Primary reason for leveraging Cloud technology



Priorities like increased productivity and improved profitability are clearly cloud-enabled

Cloud enabled priorities over the next 12 months



As highlighted in our survey, businesses across EMEA and Africa are prioritising bottom-line business benefits – increased productivity, improved profitability and cost savings – over the next 12 months. In Africa specifically, the drivers for cloud adoption are closely aligned to EMEA's overall, but with a more pronounced focus on ESG/sustainability benefits, improved cyber posture and increased agility.

Managing costs is a vital aspect of any investment, and the tangible benefits of cloud solutions may take time to realise. Some organisations choose a gradual or phased approach to implementing cloud solutions. This involves introducing a comprehensive strategy over an extended period or selectively investing in solutions that address specific operational needs. Additionally, organisations may have a workforce accustomed to handling on-premises infrastructure, requiring reskilling and adapting to a learning curve. These factors collectively shape the timeline for an organisation to fully realise the cost advantages offered by cloud solutions.

African businesses place a higher importance on building stakeholder trust and enhancing the customer experience; this is top of mind for many organisations right now due to its significant commercial and competitive value. With online environments, customers expect seamless, enhanced and innovative experiences. And as customers are increasingly moving to online platforms, having these scalable and innovative digital capabilities is now a necessity.

Businesses need to improve accessibility and cost efficiency, particularly as they transition away from exclusively brick-and-mortar operations. Online environments can be resource- and capacity-intensive, requiring massive servers to house online storefront and inventory solutions, at a predictably significant cost.

With the advent of cloud technologies, businesses can access the capacity that they need, when they need it, without latency or downtime and pay for what they actually use. Another benefit is the ability to design add-ons and innovate to suit the unique needs of organisations and their customers. Just as there is no one-size-fits-all for customers, there is no one-size-fits-all for businesses, and the cloud is making this flexible customisation possible.

Cloud adoption is at a turning point in Africa

Africa's adoption of cloud technologies, which aligns closely with EMEA's, reaffirms a crucial imperative: organisations must continue to accelerate their cloud journey to remain competitive in the global market.

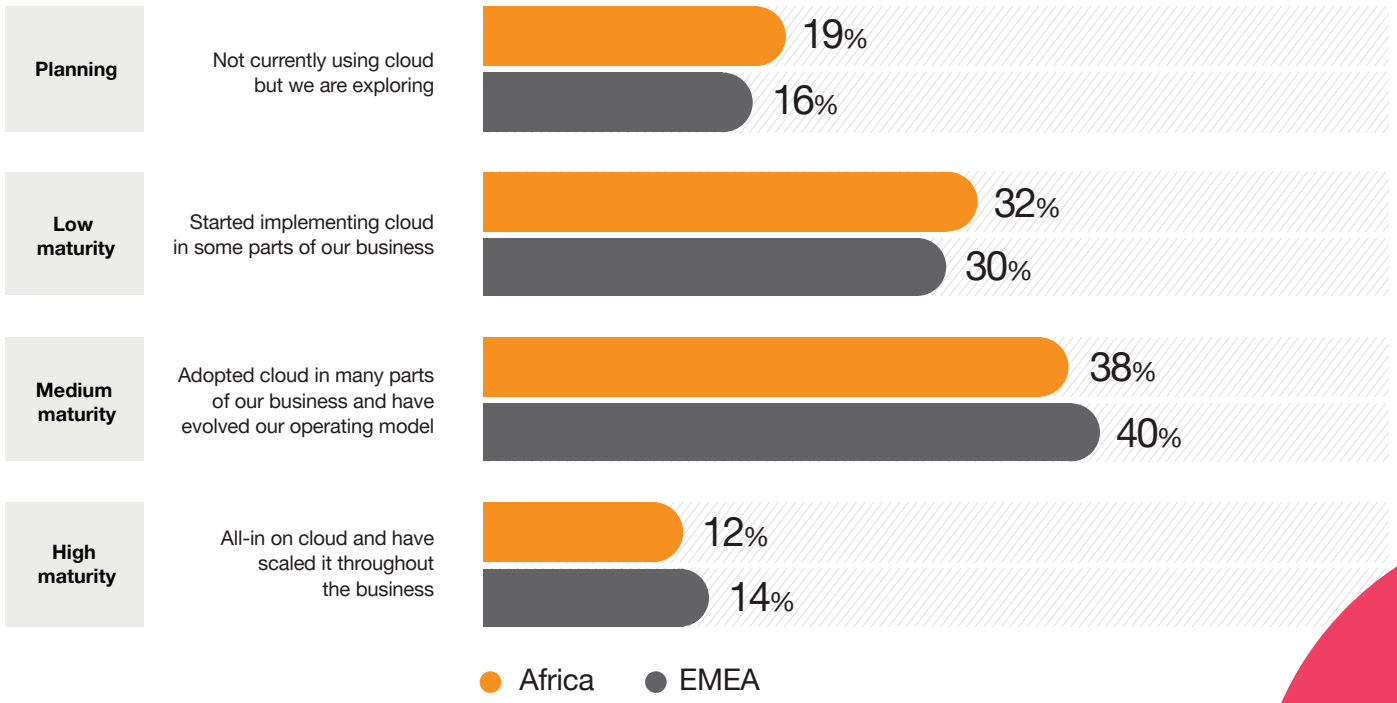
Africa has witnessed an encouraging surge in cloud adoption across its business landscape. Over 50% of companies in Africa have already adopted cloud technologies in all or most parts of their operations, aligned to the overall maturity of respondents across EMEA.

The outlook is even more promising, with 61% of enterprises planning to transition all their operations to the cloud within the next two years. African businesses also plan to continue to accelerate their cloud transformation journeys.

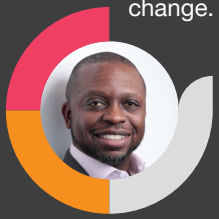
This focus on cloud adoption now and in the near term is not entirely surprising, since cloud is recognised as an enabler of economic growth across Africa.

Organisations that have had to innovate and pioneer solutions to bring their services closer to end-customers often recognise the crucial role of cloud. Cloud technologies also reduce the time-frames and improve the agility of innovation development and adoption, while providing much needed business resiliency as well. These are important factors in Africa, and help to explain the outlook for cloud adoption.

Cloud maturity in Africa



> In Africa, we are in a unique position with regard to cloud adoption. Africa is dynamic and entrepreneurial, with a youthful population that is more open to technology disruption and transformational change.
> In a nutshell, you can't compare Africa to other continents and regions, but there is enormous potential for cloud solutions.
> We are on the cusp of major change and Africa's customers and businesses are driving that change.



Tshifhiwa Makhari
Cloud Transformation Leader

50%

of companies in Africa have already adopted cloud in all or most parts of their business.

61%

of companies will have all their operations in the Cloud within two years.

Realising measurable value, discovering additional benefits

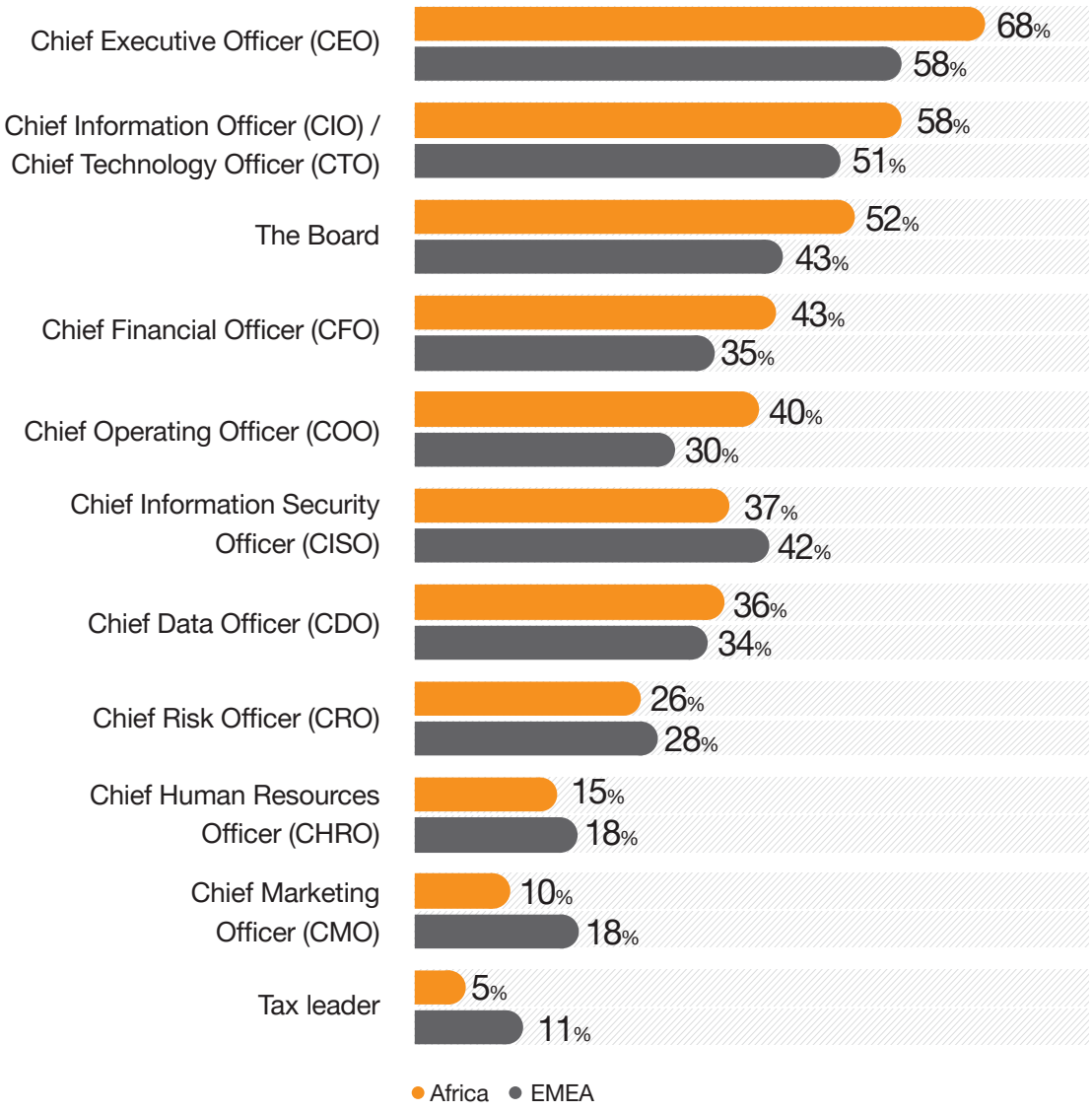
Survey respondents across Africa already achieve measurable value from cloud and expect to continue doing so over the next 12 months.

African businesses already derive considerable value from utilising the cloud, aligned to their key priorities, in many cases surpassing their counterparts in EMEA in this regard. Cloud's reputation is well-established; it is known for enhancing productivity through on-demand data availability, making data available when and where it is needed and supporting decision-making. Some companies are discovering additional advantages, including improved customer experiences and enhanced stakeholder trust, heightened agility, innovation in products and services, and the exploration of new revenue streams. The 'pay-as-you-go' model of cloud also supports cost savings.

Cloud technology delivering measurable value

Proven value means cloud has become a business-driven priority

Most important decision makers involved in company's cloud transformation investment



Recognising the profound business transformation enabled by cloud, our survey shows that the most important cloud decision makers are CEOs. Cloud is emphatically a c-suite, business driven priority rather than a technology-led initiative.

In Africa, Boards and CEOs are directly involved in building the business for cloud investment and signing off on the expected business value. Direct involvement by these leaders means that they are seen as championing change in their organisations.

The recognition of cloud computing as a strategic enabler of business transformation and competitive advantage has introduced several new stakeholders that are involved in cloud investment decisions.

Functional leads in production seek greater efficiency; CFOs target cost savings; sales functions aim to enhance customer experience; CISOs want to ensure cloud investments adhere to relevant laws, regulations, and industry standards; and CIOs pursue increased speed and flexibility.

Our survey shows that those businesses going 'all-in' on cloud to modernise their business will be the first to transform fully, reinvent business models, outperform the competition, save costs and deliver radically better services to customers. Going 'all-in' requires all stakeholders to buy in and participate fully.

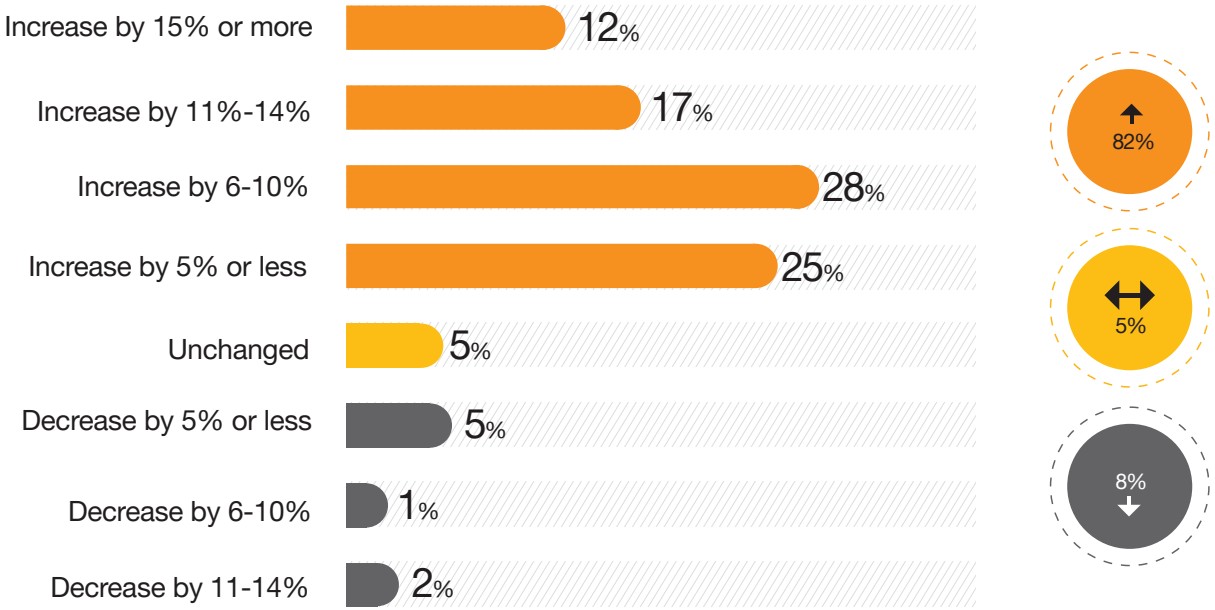
The case for increasing cloud investments in Africa

Most companies intend to increase their investments in cloud. While budget is a real concern, there is no question that long term investments in cloud more than pay their way.

Our survey shows that organisations and executives in Africa are already realising significant value from existing cloud investments and they are allocating substantial budgets to propel transformation.

More than 80% of respondents indicated a 5% to 15% or greater rise in cloud investment for 2023. This increased investment is particularly directed towards enhancing customer experience and fostering innovation.

How is your organisation's cloud budget changing in the next 12 months?



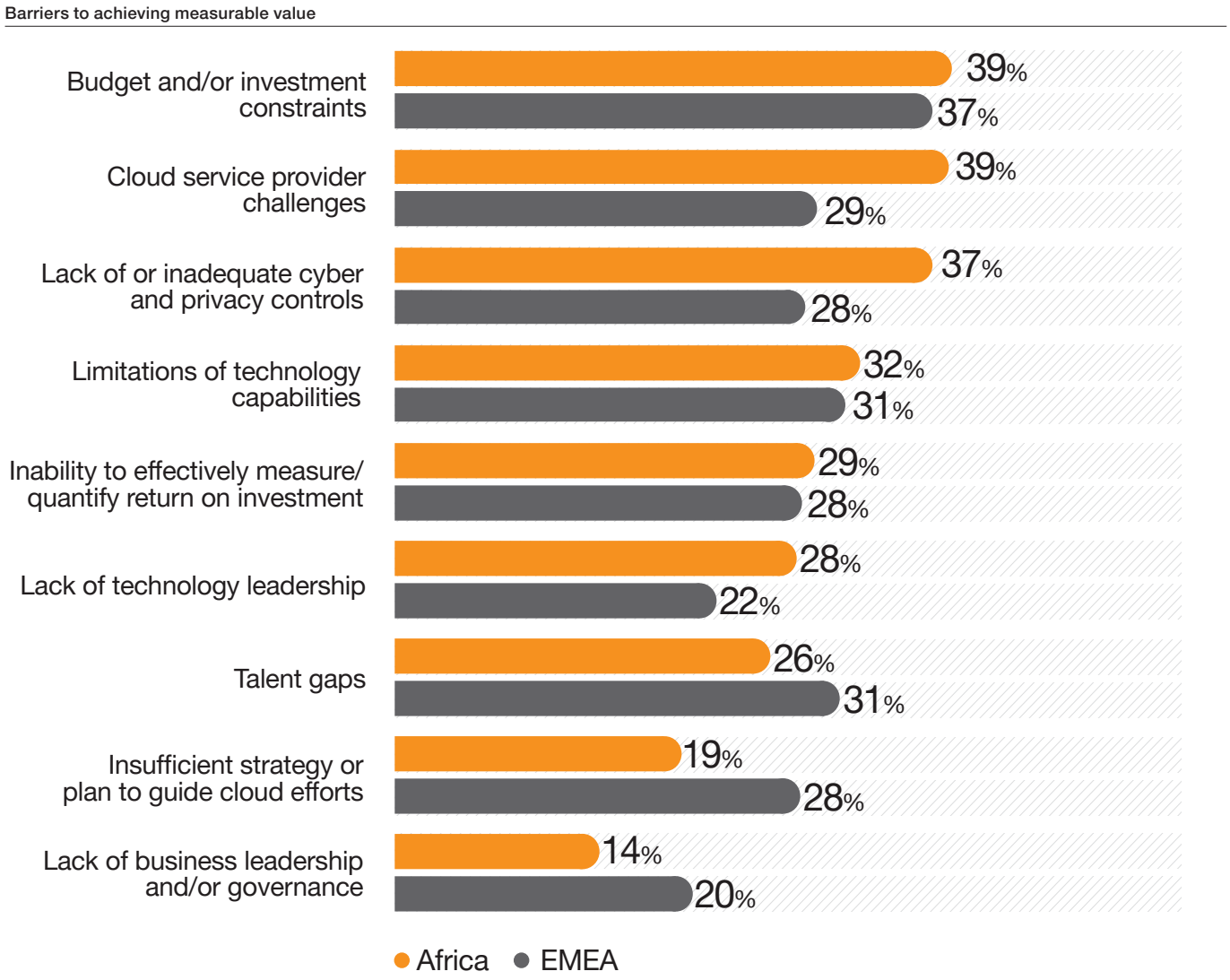
The top five areas businesses in Africa have prioritised for increased cloud investment are:

1. Customer experience (CRM, Digital Customer Portals, Applications, Chat Bots);
2. Innovating new digital products and services;
3. Cloud strategy;
4. Digitising Supply Chain and
5. Manufacturing and Finance Transformation (e.g. legacy modernisation of ERPs, SAP on hyper scaler).

While not top of the Africa agenda, these topics are a priority across EMEA and should gain relevance in Africa with increased cloud adoption and maturity:

- Cloud Controls (FinOps, Compliance, Security) and
- Cloud operation model and workforce (Cloud CCOE).

Barriers to adoption: specific challenges to overcome



More than 80% of businesses in Africa say that they will increase cloud investment in 2023. The #1 barrier remains budget constraints and while budgets are a justifiable concern, there is no question that in the long term, investments in cloud more than pay their way.

Businesses in Africa typically encounter specific challenges that shape their cloud journeys. Budget constraints, talent shortages, and the imperative for robust cybersecurity and privacy measures emerge as critical hurdles. These factors, coupled with infrastructure availability concerns, necessitate strategic resilience as businesses chart their courses toward cloud maturity.

Other barriers in Africa include cloud service provider challenges and a lack of technology leadership. With global multinational cloud companies investing significantly in infrastructure build and service provision in Africa, businesses will have more choices and more readily address service provider challenges.

The second- and fourth-ranked barriers relating to talent availability are more difficult to solve. In fact, our US and EMEA survey results reveal that a lack of skilled cloud talent and limited technology capability is a global concern. It suggests a shared global imperative to ensure that the rapid evolution in cloud services can be met with equally dynamic and capable talent. Africa's youthful demographic profile is an opportunity to upskill the talent of tomorrow.

Barriers to adoption: talent, skills and the will to change

Businesses in Africa need to move fast and develop the right talent strategies, recruiting or outsourcing skilled resources and upskilling current employees. Considering Africa's challenges with unemployment, these strategies can create more meaningful employment opportunities.

However, businesses in Africa also may need to work harder to develop the right talent strategies and upskill their employees with the right cloud capabilities. A gradual approach to cloud adoption can complicate workforce development; for example, workforces accustomed to supporting on-premise infrastructure may struggle to transition to cloud-enabled environments. This is particularly true when the approach is gradual and/or entails a combination of migration, modernisation and cloud-native development.

Businesses in Africa may also grapple with the decision to outsource specialised skills or develop talent internally through training initiatives. Many organisations deploy a mix of strategies, combining outsourcing with internal skill development to optimise return on investment and ensure cost-efficiency.

Additionally, recognising that core skills including cyber security and project management are in short supply in the current market, businesses can also investigate managed services as a route to accessing in-demand capabilities as required.

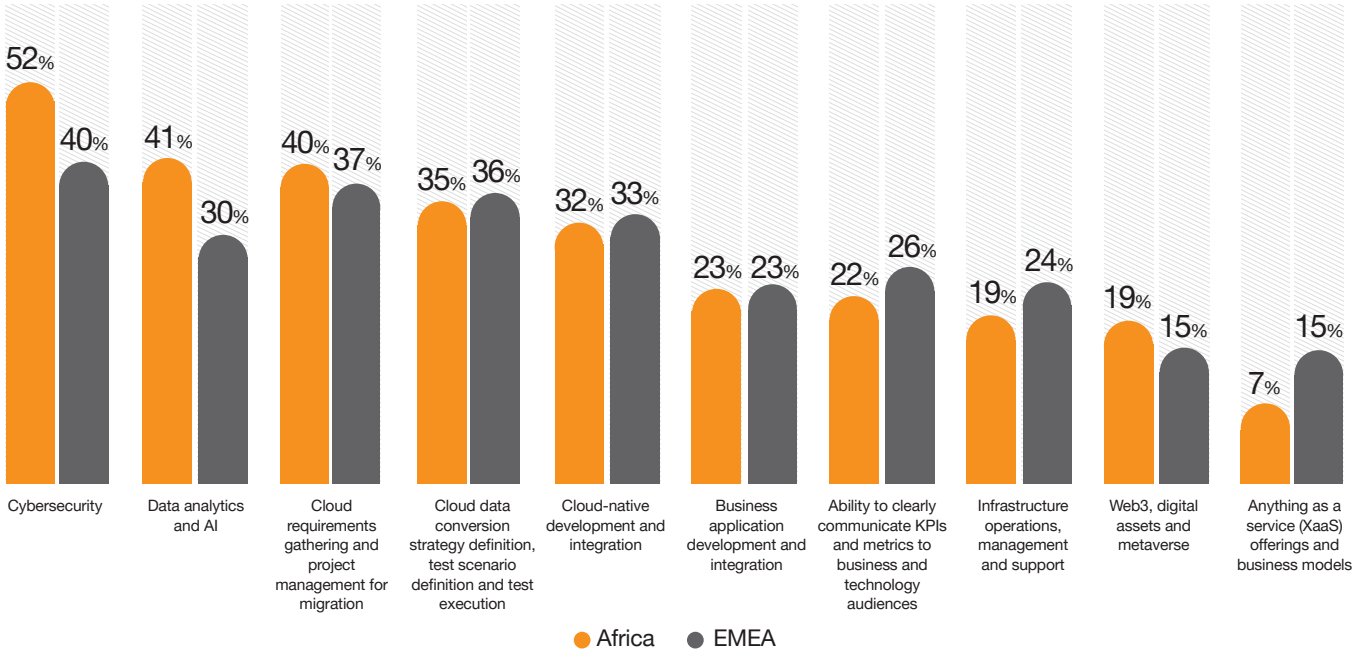
The combination of insourcing and outsourcing can also help to address the varying levels of enthusiasm and resistance internally. It is important to remember that the human factor can be a determining factor of success or failure for a business's cloud journey.

As they plan their cloud transformations over the next 12 months, companies in Africa say that the most important skills to build are cybersecurity, data analytics and AI and the skills needed to gather requirements for cloud migration including project management for migration.

More than 50% of respondents in Africa indicate they will hire or contract the skills that they need, such as cybersecurity and data analytics and AI skills, while choosing to retain and develop existing talent for cloud requirements gathering and cloud data conversion skills.

These skills will contribute to the velocity of adoption while safeguarding new operating environments.

Top three most important technology skills to build over the next 12 months to achieve cloud transformation goals



Inspiring talent to drive change

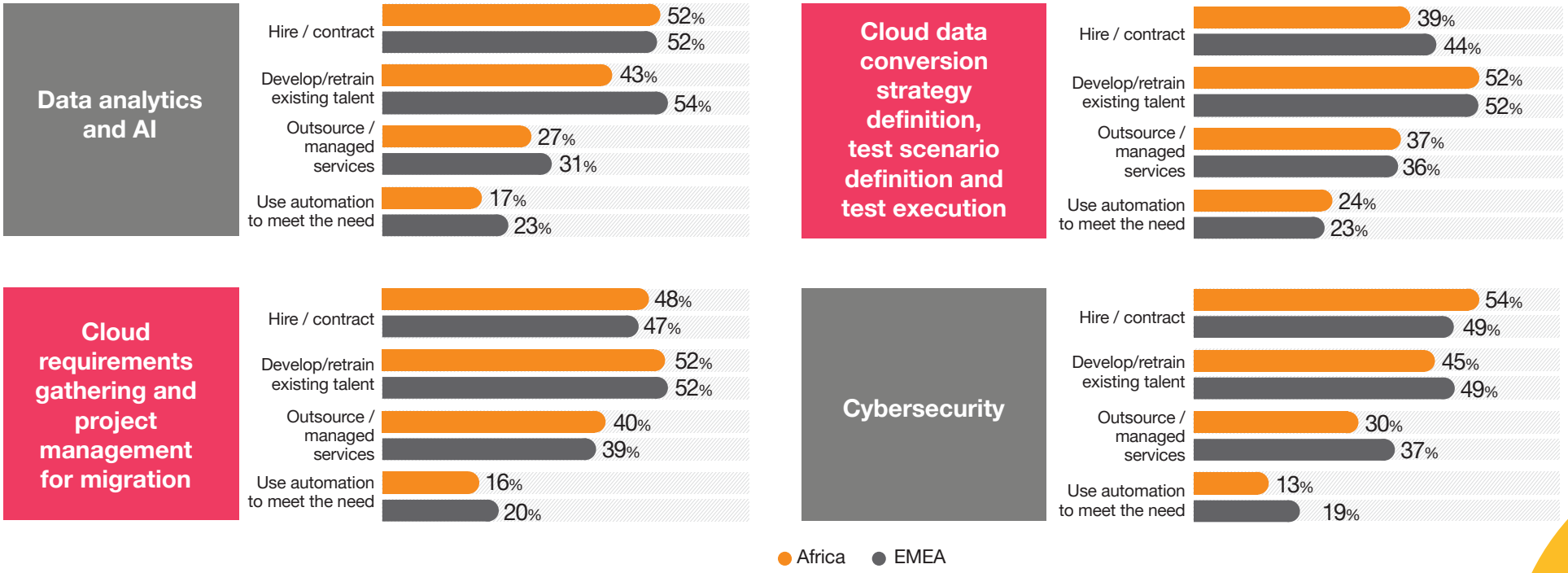
Having identified the critical skills for cloud transformation, businesses in Africa are joining the globally competitive war for talent in highly specialised categories.

One of the often underappreciated aspects of skills development is the role of experienced leadership. Leaders need to be able to assess whether they will retain and develop their employees, hire externally and/or outsource certain functions.

All leaders and businesses are different, but there are a few tips to keep in mind:

- **Business goals are the #1 priority:** Clarify and communicate the business's cloud modernisation and migration strategy up front, since this will drive successful execution.
- **Establish flexibility and work iteratively:** Establish a flexible cloud foundation that brings together security, compliance and efficiency. Work iteratively to achieve quick wins and build momentum, which will demonstrate ROI sooner.
- **Align on methodology:** Develop a comprehensive migration and modernisation methodology that is clearly understood and followed by the whole project team from first steps to final outcomes.
- **Automate and accelerate:** Use proven automation tools to simplify and accelerate the process from infrastructure deployment and code release to data transfer and security validation.

How do you plan to acquire your prioritised technology skills over the next 12 months?



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Cloud-powered companies are focusing on five key actions to achieve full value from cloud.

1 They have stronger alliances across the C-suite, combining the business and tech roles they need to achieve and sustain cloud success.

By analysing where companies are achieving multiple, measurable benefits from cloud, we were able to identify a leading group: the cloud-powered companies that are 'all-in' on cloud. They are outperforming other businesses in several areas:

- 83% of cloud-powered companies have increased revenue over the last six to nine months (compared to 67% of other companies that are not cloud-powered);
- 89% expect to increase their revenue over the next 12 months (compared with 76% of others);
- 60% have implemented an enterprise-wide transformation (compared with 42% of others).

One of the factors that sets cloud-powered companies apart is c-suite level support inspiring real change.

To build acceptance and accelerate adoption, CEOs can lead by example, demonstrating the business benefits that cloud delivers beyond a pure technology focus. More broadly, it is vital to earn the support of all executives to ensure that cloud adoption results in enterprise-wide value, not silos or pockets of buy-in.

Cloud-powered companies demonstrate a distinct advantage by fostering strong alliances among the c-suite, promoting collaboration between business and tech roles, and thereby enabling a more seamless and effective approach to cloud transformation.

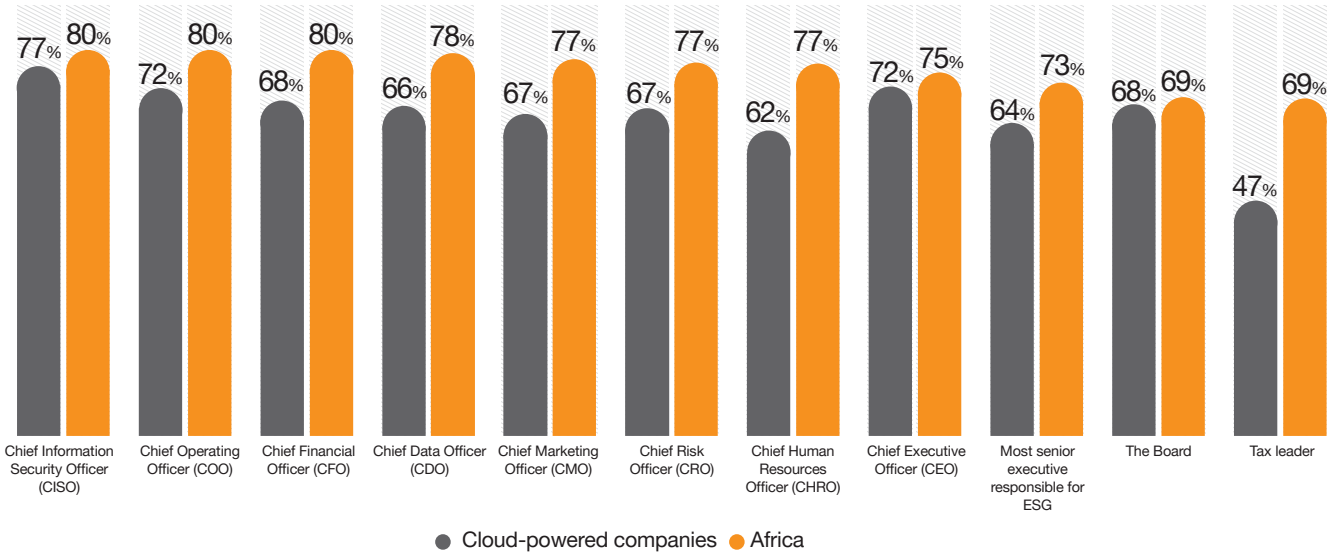
There remains, however, a perception that cloud decision making is the responsibility of the technology department. Successful cloud adoption is dependent on close alignment and seamless collaboration between business and IT and requires the support of all executives.

Leadership plays a key role in ensuring that this alignment is there from the outset.

Conversely, a lack of strong leadership for alignment puts cloud transformation at risk, especially when there are inherent complexities that can lead to project delays.

In Africa, our survey shows that the strongest and most impactful working relationship is the Chief Information Security Officer (CISO). Closely related, the most important skill prioritised for investment is cybersecurity. The CISO does not rank among the top five decision makers involved in cloud transformation, which indicates that the role needs to be elevated beyond working relationship to that of key decision maker.

% with strong working relationships



2

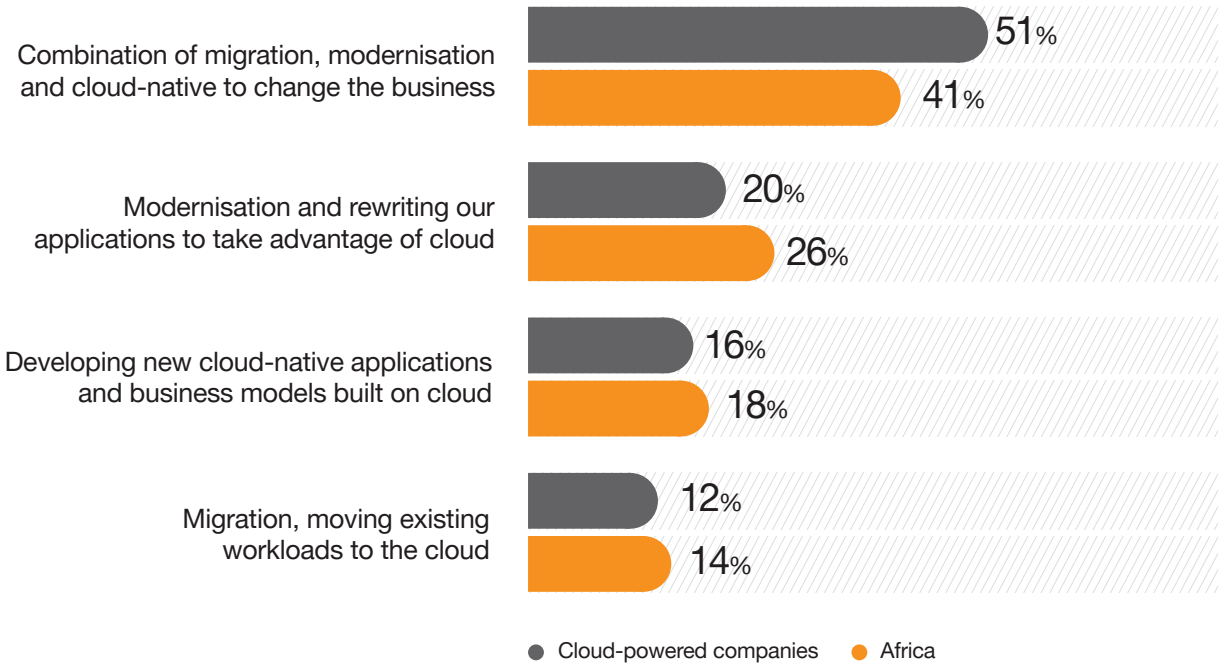
They take a combinatorial route to cloud transformation, blending migration, modernisation, and cloud-native approaches to transform their business.

Cloud-powered companies tend not to take a linear approach to cloud adoption, from workload migration to asset modernisation to cloud-native development. Instead, they often employ a combined approach, based on a clear vision of what they want to achieve and supported by robust architectural governance that is aligned to defined business goals. An architectural roadmap allows companies to clearly differentiate the precise case for cloud migration for each application.

That, in turn, enables the prioritisation of resource requirements ensuring optimal value creation. The roadmap also clarifies dependencies and thus the prioritisation of structural cloud services that allow easier implementation and scaling of value generating cloud-based services later. And last but not least, a combined approach prevents the accumulation of new (cloud-based) technical debt so that an organisation can remain agile and adapt quickly to changes as they arise.

A combinatorial approach also enables organisations to realise cost savings with migration approaches while also investing in specific modernisation or cloud native projects. This combination facilitates enterprise-wide transformation, enhances customer experience and improves profitability.

Primary reason for leveraging cloud technology



3 They place a heavy emphasis on cloud controls and governance.

When it comes to adopting leading practices, cloud-powered companies demonstrate greater maturity, especially regarding governance and risk, than other businesses.

Gaining the full benefits of cloud-based services depends on a company having clearly defined processes and responsibilities and imposing strict discipline on the way cloud is deployed day-to-day.

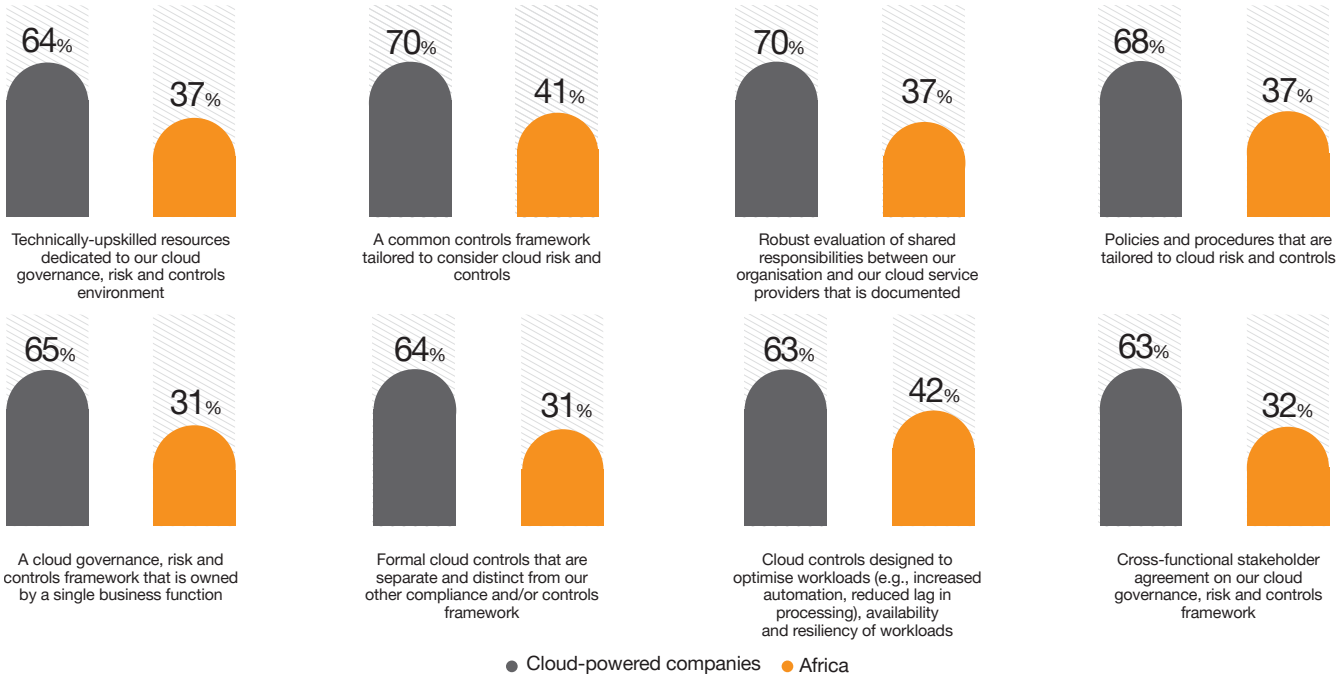
Our survey results show that cloud controls and governance are areas that businesses across Africa need to focus on and improve. A combinatorial approach to adopting cloud should be supported by cloud security and controls, embedded in the scope from design to post-implementation support, for all cloud technology deployment projects.

Furthermore, a combinatorial approach to cloud adoption may result in a multi-cloud environment with many different providers. Cloud providers manage aspects of security services related to their applications and platforms, but organisations themselves must take overall responsibility for risk management across all environments and reinforce a deeper level of collaboration.

Finally, controls and governance only work when they are embedded in the culture of an organisation and lived by everyone, from the CEO to system administrators, every day.

Cloud-powered companies tend to adopt leading practices across cloud governance, risk and controls, well ahead of the curve. However, even amongst this group there are still opportunities for improvement.

% stating they have implemented cloud controls



> The increase in cyber-attacks, coupled with the rise in remote work and greater reliance on digital solutions, has expanded the attack surface for organisations. Managing risks associated with third-party service providers has also become essential to prevent disruptions that could have cascading effects.

Ahmed Chohan
Africa Digital Trust Leader

4

They focus on building cybersecurity skills over the next year to support their cloud transformation goals.

Cloud-powered companies are focused specifically on building cybersecurity, data analytics and AI skills to support their cloud transformation goals.

Our Africa survey results show that cloud-powered companies are predominantly focused on building cybersecurity skills over the next 12 months.

They are prioritising operational resilience, as well as integrating cyber resilience with operational risk management. This multi-faceted approach is driving investment in capabilities within these organisations to safeguard operations.

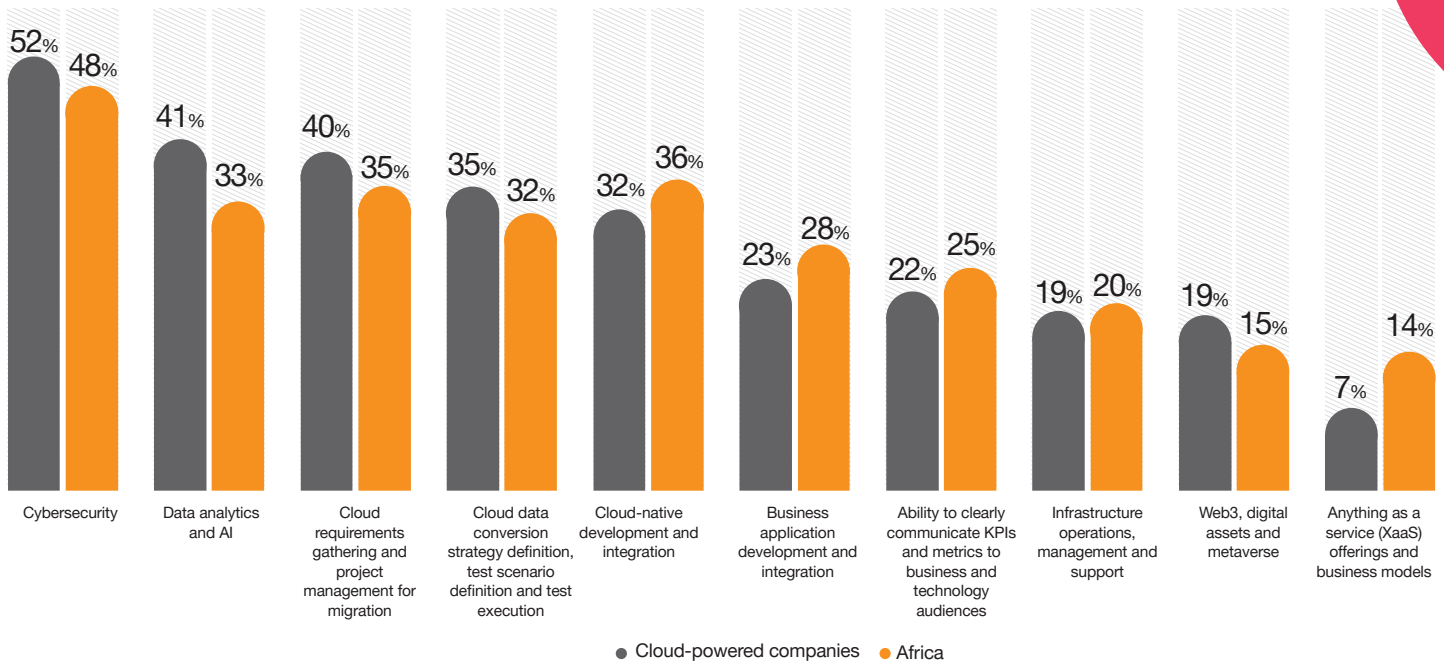
Recognising that cloud adoption can be a catalyst for growth, boards and executive teams are confronting the necessity of business model reinvention and critical skills development.

Additionally, they need to appreciate the importance of a mindset change and empower employees to assume more responsibility and make decisions.

Since those decisions are increasingly data-driven, it is hardly surprising that the second most important skill set to build is data analytics and AI.

Increasingly, it is becoming clear that effective cloud project teams combine multiple skills sets and perspectives: technical skills as well as strategic, operational, security, business function-specific skills, and legal, intellectual property and process expertise, among others.

Technology skills most important to build over next 12 months



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They are much more likely to have an enterprise-wide data strategy than other companies.

Cloud-powered companies are leveraging enterprise-wide data strategies to harness data and streamline and automate their processes.

Today, becoming data-driven is impossible without cloud. The stepping stones to becoming a data-driven organisation include creating the right governance structures and concentrating on building the necessary skills and operational changes. By streamlining architecture, cloud-powered companies modernise their data to provide an integrated view.

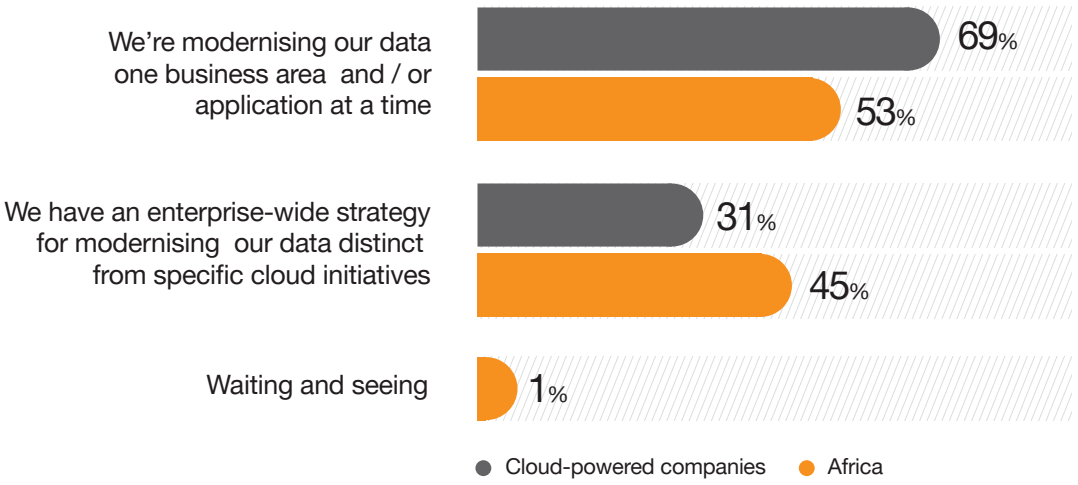
Cloud technology and data are also playing a transformative role in redefining traditional workflows, making it even more important to set up data as a strategic business asset to be leveraged for digital use cases.

Organisations leading the way are implementing robust policies and standards and ensuring comprehensive governance of the essential data management functions.

These functions or pillars of data management are tightly interlinked and need to work in unison, from the fundamental components of meta and master data, the building blocks from which the data model is derived, to the architecture that houses it.

A best practice application of all of these functions is critical to the success of business intelligence, AI and data science investments and cloud adoption is a prerequisite for success. Furthermore, generative AI considerations, policies and standards need to be incorporated in organisations' data governance frameworks, as part of overall data governance processes.

Company's data strategy



Harnessing data's full potential

In a time where the use of advanced technologies is not limited by geographical boundaries, organisations are increasingly relying on effective data management and utilisation to drive transformative change.

When designing their data functions and data architecture at a strategic level, organisations often segregate functions such as Data Architecture, Data Management, Business Intelligence & Analytics, AI and Data Science. These divisions are typically planned and managed independently within the organisation. However, the effectiveness of these functions is intrinsically linked to the data management activities that intersect and support each other.

The key to harnessing the full potential of data as a valuable asset lies in a consolidated strategic approach. By aligning these functions under a unified strategy, organisations can ensure that their data management practices effectively interconnect and bolster the overall value derived from data as well as reduce unnecessary costs and drive transformational change.

Hannelie Lotz
PwC Data and AI Capability Lead

3

Industry cloud and the way forward.

Benefiting from industry cloud solutions

Businesses in Africa embrace industry cloud solutions that provide tailored platforms to address industry-specific challenges and demands.

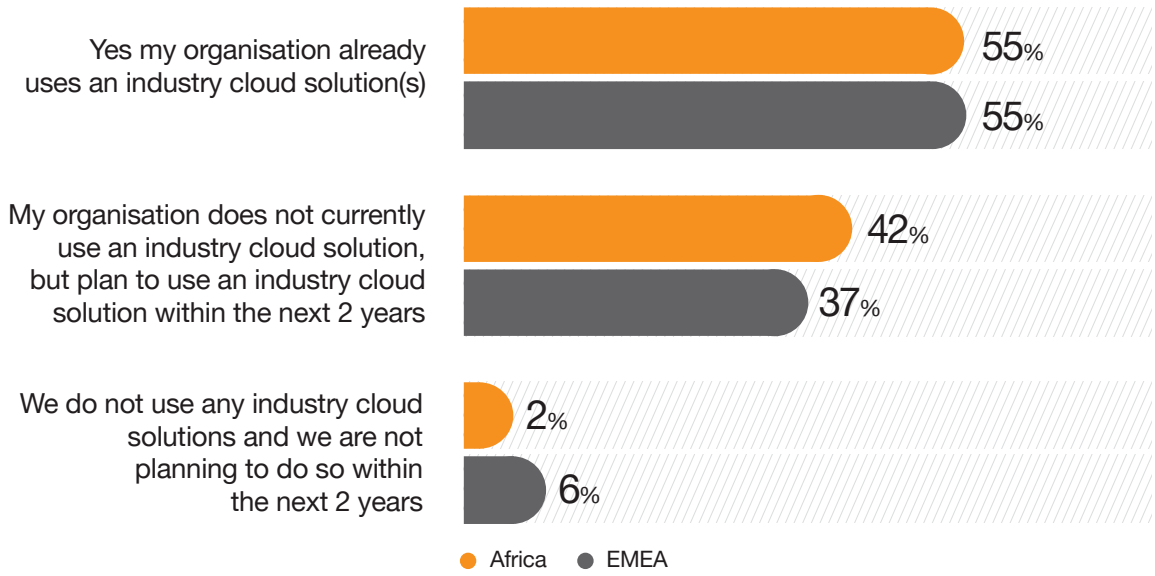
Initially, most cloud service providers offered a generic, one-size-fits-all model, requiring organisations to build their bespoke digital infrastructure from the ground up. However, with the advent of industry clouds, businesses can now access specialised platforms, products and services that are tailored to address industry-specific needs and challenges.

Our survey reveals that 55% of businesses in Africa and EMEA already use industry cloud solutions. For those who are not currently using industry cloud solutions, 42% plan to start doing so within the next two years as compared to 37% in EMEA overall.

Industry clouds provide businesses with customised tools and functionalities designed to serve specific sectors.

By integrating industry-specific workflows and data models, these platforms help businesses to innovate faster with industry-focused capabilities, and respond more adeptly to market demands, while sharpening their competitive edge in the global marketplace.

Industry cloud adoption



What's next?

Going forward, how will we transform the way that businesses in Africa consume IT? The stakes are already higher: the dramatic arrival of generative AI and the rush to capitalise on it are catalysts for change.

Africa's cloud-driven future

The pace of change and the challenge of unpredictability require new ways of working and new business models in Africa. Cloud is not just an information technology leap; it is fundamentally transformative for people, systems and organisations.

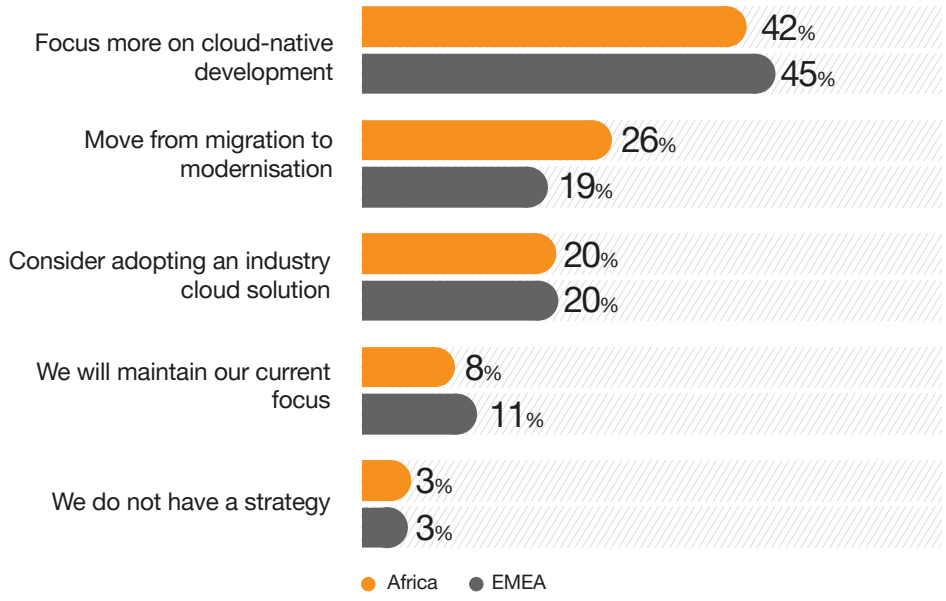
The cloud transformation maturity curve goes hand in hand with data strategy maturity. Data is now a fundamental aspect of business architecture and the foundation of intelligence, automation and insight.

Almost half of survey respondents in Africa have an enterprise-wide strategy for modernising their data distinct from specific cloud initiatives. To achieve this, they are streamlining their architectures to create an integrated view and are investing in the right governance structures, building the right skills and encouraging comprehensive alignment on business strategy. These efforts make all the difference when it comes to unlocking value from emerging technologies.

Africa is emerging as a key player in the global cloud ecosystem. Excitingly, the strategic investments in Africa by major cloud providers signify the continent's potential. With cloud transformation enabling businesses to navigate challenges, adopt emerging technologies and compete on a global scale, Africa's cloud-driven future holds great promise.

The potential in Africa is clear. But shifting from traditional ways of working to more advanced and dynamic cloud-native approaches requires more than just an appreciation for potential. It demands leadership and a practical and holistic approach to strategic transformation.

Cloud technology strategy changes over the next 12 months



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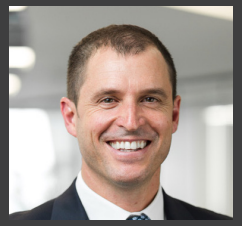

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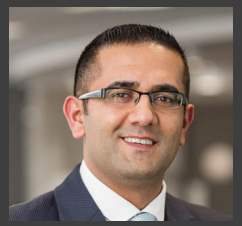

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About the survey

Methodology

Between April and May 2023, PwC surveyed 2,209 Business and Tech leaders across EMEA from Western Europe (56%), Central & Eastern Europe (18%), Middle East (19%) and Africa (7%).

Respondents were from public and private companies in seven major industries: industrial products (22%), financial services (18%), consumer markets (18%), technology, media and telecommunications (18%), energy, utilities and resources (11%), health (8%) and government & public sector (4%).

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