

DIGIT@L IMPACT AWARDS AFRICA

"Maximising The Digital Dividend"



Maximising Value of Web, Mobile and Social Media Investment. Status, Insights and Expert Advice



**CYBERSECURITY
WAS KEY TO
SUCCESS OF
DIAA WINNERS**

**TOP 20
BRANDS ON
SOCIAL MEDIA
IN AFRICA**

Research Report



Digital Impact Awards Africa 2014 Research Report



KAMPALA, UGANDA - Cyberplc Limited and HiPipo (U) Limited announce the release of a research report to help your organisation to maximize the returns to investment in web, mobile and social media. Online applications include digital financial services such as mobile money and online banking; e-services such as utilities; e-commerce and digital marketing campaigns. The report provides you unique expert insights into best practice in the fast changing deployments and use digital infrastructure. Overall, the report aims to provide insights to help your organisations ensure that digital investments enable business rather than expose you to more operational, financial, reputational and regulatory risk.

The report is a product of the Digital Impact Awards Africa (DIAA), a project that promotes good cybersecurity practice in web, mobile, social media and digital financial applications. This report will allow you to:

1. **Profit** from insights of over 30 global experts on how to maximise returns to your investment in web, mobile and social media applications.
2. **Learn** how the uneven adoption of best practice is preventing organisations from realising the full benefits of digital infrastructure.
3. **Discover** how the failure to follow good cybersecurity practice leads to loss of customers, increases promotional budgets and risk of regulatory intrusion.
4. **Understand** what leading brands are doing well online and where they too need to improve.
5. **Review** competitive dynamics in web, mobile and social applications.
6. **Gauge** your organisation's success online in relation to other brands.
7. **Use** our expert insights to increase the monetary rewards and sustainability of interactions with customers on web, mobile and social media platforms.



Forward

The digital infrastructure - web, mobile and social media - is transforming our lives. Businesses use the infrastructure to build closer relationships with customers, promote their brands, integrate services with payment systems and tailor services to customers. For customers, the infrastructure presents a limitless global marketplace with choice, increased personalisation and reduced costs for goods and services. Governments too are using the infrastructure to deliver innovative, cost-effective and efficient service.

We project that the impact of the digital infrastructure and the services it supports will only grow with growing broadband connectivity and penetration. More online services impact economic growth by supporting jobs and linking good/services to consumers. Regrettably, more reliance on the digital infrastructure also means more opportunities for hackers and other malicious threat actors. Our research shows that cybersecurity is a pressing issue in Africa. Digital infrastructure in all sectors is vulnerable to cyber-attack due to inadequate measures to mitigate risks such as data leakage and fraud. We have seen a growing number malware attacks first against desktop computers and now mobile and social media platforms. Malicious actors exploit insecure and outdated software, limited user awareness and the absence of basic controls such as anti-virus.

Accordingly, Cyberplc Limited and HiPipo (U) Limited have launched the Digital Impact Awards Africa (DIAA) Project to promote good cybersecurity practice in web, mobile, social media and digital financial service applications. This report presents the findings and recommendations of the 2014 DIAA research project. We identify the winners for the Ugandan market. Additionally, the report presents a trailblazing Africa Social Media Ranking. A major finding is that the top brand on Social Media in Africa is local.

This report is timely because it identifies the cybersecurity issues that organisations must address to meet customer and regulatory requirements. Regulators are paying closer attention to digital services because of their impact on economic well-being. For example, in Nigeria regulators levied heavy fines on telecom operators over the breach of quality of service regulations. Similarly, we identified that customers are choosing services that offer good cybersecurity in terms of system reliability and protection of transactional details. For example, we observed that customers of unreliable Digital Financial services tend to switch to rival providers during downtime and often do not return. Operators with system downtime face substantial reputational and operational costs and require heavy promotional budgets to stem further customer churn.

We also support activities to improve readiness against cyber-attacks across Africa. For example, we developed the National Information Security Framework (NISF) for Uganda on behalf of the National Information Technology Authority-Uganda (NITA-U).

Finally, this report underlines the value of ongoing service innovation for two reasons. Firstly, only two winning entries scored more than 80%. Therefore, all have more work to do. Secondly, even if an entity scored 100%, the digital infrastructure macro-sector changes so quickly that there is no guarantee that any such advantage would be sustainable. Accordingly, our recommendations are vital for your ongoing success.

Dr. Frederick Wamala, CISSP®
Chief Cybersecurity Consultant
Cyberplc Limited

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Executive Summary

1 EXECUTIVE SUMMARY

Cyberplc Limited and HiPipo (U) Limited assessed nominated web, social media and mobile applications for their ingenuity and compliance with best practice. The candidates were nominated for the Digital Impact Awards Africa (DIAA). The assessment focused on digital marketing campaigns, e-Service, e-Commerce and digital financial applications and their compliance with best practice in areas such as cybersecurity, usability, reliability, platform integration and accessibility. Our assessment in Uganda covered the financial services, telecommunications, government, media and commercial sectors. The Africa Social Media Ranking covered twenty countries in sub-Saharan Africa. As a result, we are pleased to announce that this report offers you broad and unique insights into best practice in the fast changing digital infrastructure sector. We explain in great detail the strengths and make recommendations to improve applications across sectors. We believe our findings would increase the monetary rewards and sustainability of your interactions with customers on web, mobile and social media platforms.

1.1 Summary of Findings

There is no doubt that web, mobile and social media applications now drive a growing number of service delivery and customer interaction activities in Uganda and Africa in general. However, our assessment identifies that the overall level of compliance with best practice is below ideal levels. Obtain a copy of our report to explore detailed findings and recommendations on:

- The operational, reputational, financial, regulatory and compliance risks that system downtime poses to operators of digital services.
- How cybersecurity affects confidence in web-based e-banking, e-commerce and e-service applications.
- How mobile adaptable websites or dedicated mobile websites/apps impact the costs of running businesses.
- How successful mobile-based applications must suit changing user habits.
- The growing importance of social media to operational effectiveness.
- How to operate effective digital marketing campaigns.
- How top brands in the Africa Social Media Ranking exploit the platform.

1.2 Winners - Uganda

The successful inaugural DIAA united financial services, telecoms, information technology, cybersecurity, government and private sector organisations in an effort to recognise and encourage innovation and good practice in web, social, mobile, e-services, digital finance and cybersecurity domains. The winners below are for the Ugandan market and they are:

- Digital Brand of the Year: **MTN Uganda**
- Best Digital Financial Services: **Airtel Money**
- Best Corporate Brand on Social Media: **MTN Uganda**
- Most Promising Digital Brand: **Centenary Bank**
- Best Corporate Website: **NSSF**
- Best Digital Marketing Campaign: **MTN Egg Hunt**
- Best E-Commerce-Website: **Hellofood**
- Fastest Growing Corporate Brand on Social Media: **NBS Television**
- Best Government Agency on Social media: **KCCA**
- People's Choice Commercial of the Year on YouTube: **MTN, "Oh, The Things You'll Learn."**
- Best Mobile App: **The Pearl Guide** - Experience Premium Uganda
- Best E-Services: **URA E-tax**
- Best Corporate Cybersecurity Practice: **Standard Chartered Bank Uganda**
- Best Digital Financial Service Innovation: **JPESA**
- Best Radio Station on Social Media: **GALAXY FM 100.2**

1.3 Winners - Africa Social Media Ranking

The Africa Social Media Ranking covers corporate brands in 20 sub-Saharan African countries known to have highest Internet usage. The full list of countries and brands scores is in the analysis section. All brands in the Ranking are among the top 20 corporate brands on social media in the countries in which they operate. The winners are:

- Top Brand on Social Media in Africa: **MTN**
- Top E-Commerce Brand on Social Media in Africa: **OLX**
- Top Retail Brand on Social Media in Africa: **Shoprite**
- Top Food and Beverages Brand on Social Media in Africa: **Knorr**
- Top Health & Beauty Brand on Social Media in Africa: **Natures Gentle Touch**
- Top Media Brand on Social Media in East Africa: **NTV**

1.4 Research Methodology

We adopted a multi-phase methodology for assessing web, mobile and social media applications for their ingenuity and adherence to best practice.

1.4.1 Nominations - Public and Research Panel

1.4.1.1 Public Nominations

The first phase of the Digital Impact Awards Africa (DIAA) nomination process was the publication of an online form to solicit public suggestions.

1.4.1.2 Research Panel

The Research Panel created a list of 200 organisations delivering web, mobile and social media services.

1.4.2 Awards Jury

We assembled a truly exceptional Awards Jury. Our jurors have expertise and practice experience in various domains of digital infrastructure across the globe. The jurors include a venture capitalist working at the Wall Street and Zurich; a Forbes Magazine specialist on entrepreneurship and leadership; the Chairman of Uganda Parliament Committee on ICT and a distinguished Professor of Electronics and Informatics from Belgium. Others include a pioneer of Web and Mobile Applications in East Africa; a non-profit incubator of companies from the Philippines; a Ghanaian social innovator and entrepreneur and members of the World Economic Forum (WEF) Global Leaders' group. We also had software engineers from Belgium and India; two Directors from the National IT Authority, Uganda (NITA-U); the Head of Computer Science at Makerere University and researchers from Jamaica and Rwanda. The full Jury list is in the Appendix.

1.4.3 Additional Research

The Jury used defined criteria and its own expertise to assess each nominee.



TECHNICAL ANALYSIS OF FINDINGS

2 TECHNICAL ANALYSIS OF FINDINGS

The rest of this report presents detailed technical analysis of the winning entries in the DIAA. Our analysis is important to the winners because we identify gaps in current solutions that are denying them the full returns to investment. Importantly too, failure to follow good practice could see the new platforms heighten your exposure to reputational, regulatory, financial and information risk. However, we believe the findings are even more crucial to organisations that did not win - nominated or not. How so? Your organisation cannot afford to sit out the web, mobile and social media revolution. If your organisation tries to swim against the tide, we worry that you would neither thrive nor survive for long. As noted above, organisations of all sizes use the digital infrastructure to enhance relationship with customers, involve customers in product and service innovation, mobilise funds, recruit staff, run marketing campaigns and manage their reputations.



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