

Powertech IST

Dr Herb Chikwanda : CEO
Altron Investor Relations Day, 16 February 2009



Powertech **IST**

Agenda



- ❑ Overview and Background
- ❑ Group Revenue
- ❑ Group Skill Set and BBBEE
- ❑ Group ISO Listings
- ❑ The Divisions
- ❑ Closure

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Overview and Background

Powertech IST Timeline

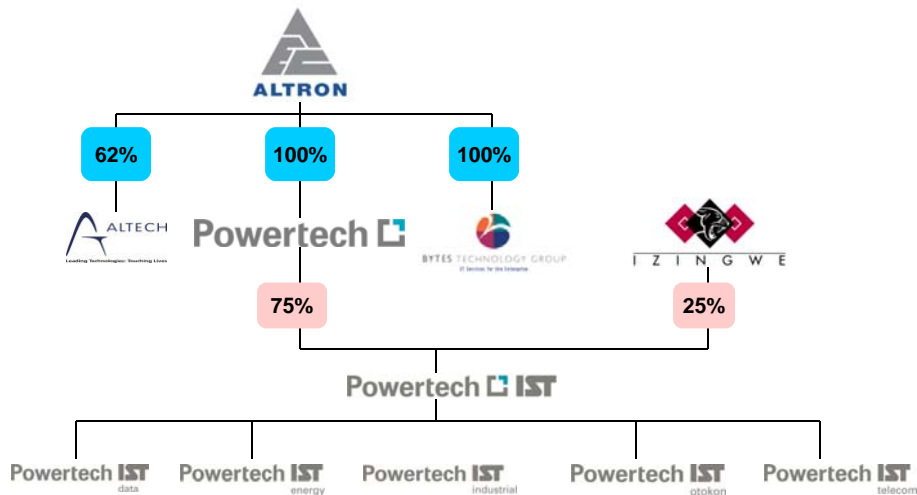


- ❑ 1980: Founded in Pretoria
- ❑ 1998: Listed in electronics sector of JSE
- ❑ 2001: Group restructured to improve results
- ❑ 2003: Performance restored with focussed growth drive
- ❑ 2004: Delisting
- ❑ 2007: Powertech Acquisition

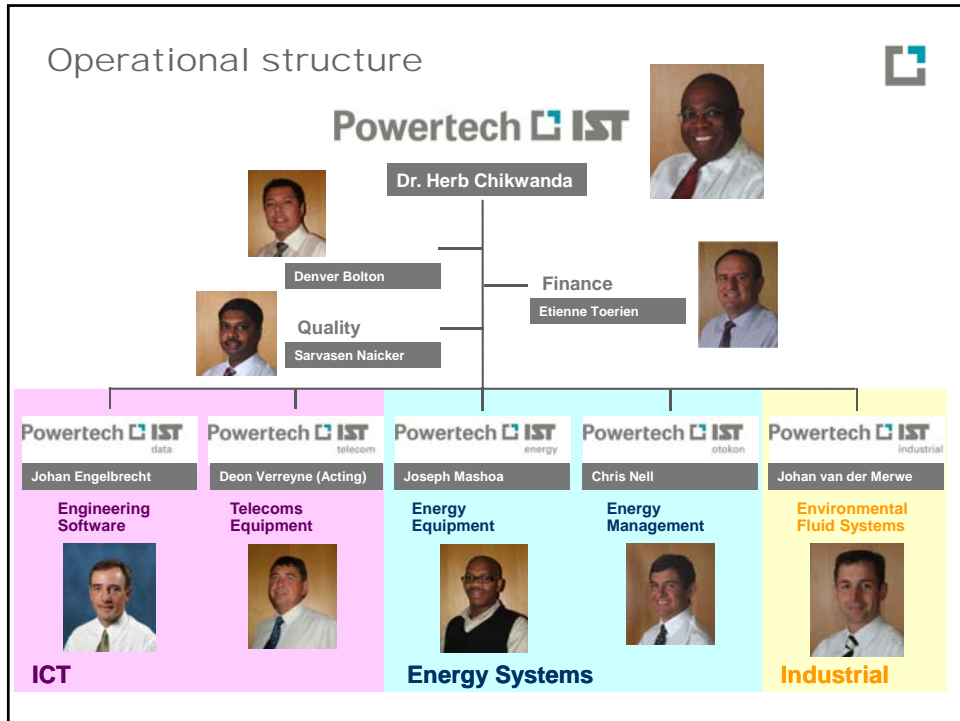
Powertech IST

Overview and Background

Shareholding



Powertech IST



Overview and Background
Where We Work

Engineering Technology for Capital Intensive Industries

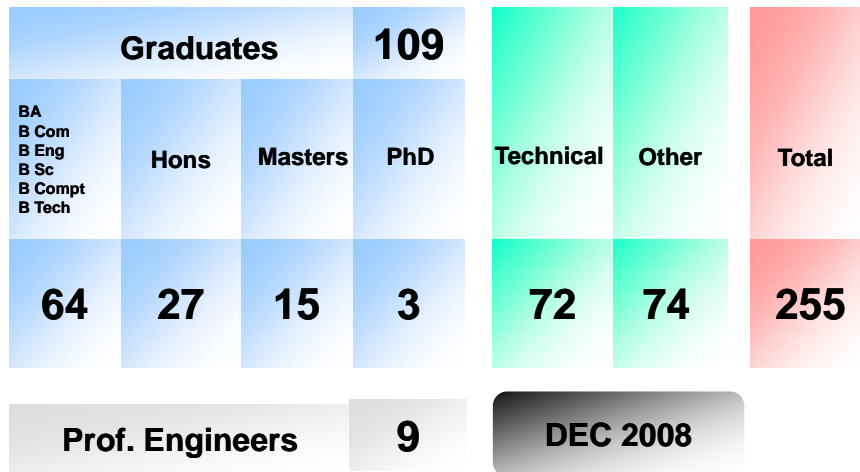
- 1. Utilities** (Telecoms, Electricity, Local Authority)
- 2. 4M** (Mining, Minerals, Metals / Secondary Manufacturing)
- 3. 3P** (Pulp, Paper, Petrochemical and Food)

AFRICA AND THE MIDDLE EAST

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Group Skill Set and BBBEE

Skill Set



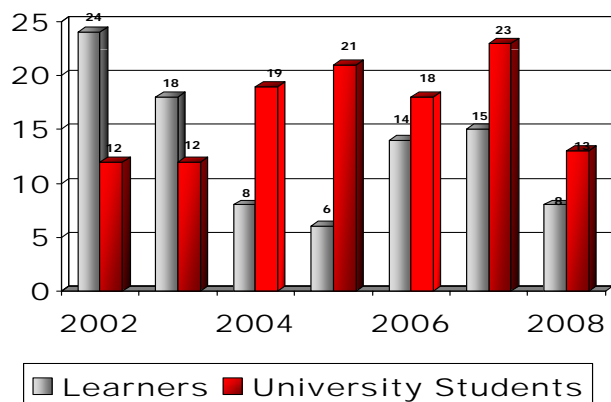
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Group Skill Set and BBBEE

BBBEE



Community Education Programme



IST has spent **R 7.5 million** on development of learners and University Students in the past five years

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- The Divisions
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Group ISO Listings

ISO Listings



- IST Holdings achieved **ISO 9001** certification in 1992
- IST Holdings and Operating Divisions held compliance certification to both **ISO 9001** and **ISO 14001** since March 1999
- All Divisions were **ISO 9001:2000** compliant as from January 2004
- All Divisions were **OHSAS 18001** compliant as from September 2007



IST Group Limited
ISO 14001
File No. A7856

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The Divisions

Overview



ICT



Data

Engineering Software



Telecom

Telecoms Equipment

EE



Energy

Energy Infrastructure



Otokon

Energy Management

IND



Industrial

Environmental Fluid Systems

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The Divisions

Powertech IST Data : Product and Customers



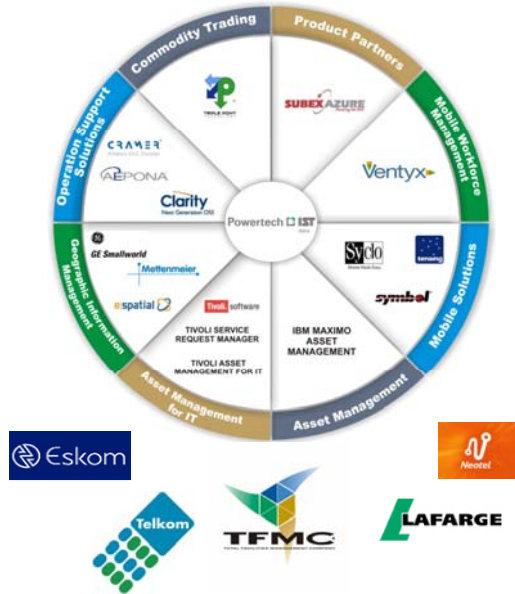
Software Engineering

- Operation Support Solutions
- Geographic Information Management
- Asset & Service Management
- Mobile Workforce Management
- Commodity Trading

Customer Base

- Telkom
- Neotel
- Eskom
- Industry

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The Divisions

Powertech IST Data : Opportunities and Threats



Highlights

- Eskom Maximo Upgrade
- Win against SAP/Largest Maximo project in Africa to date
- Order for NRM Gap Analysis Project at Eskom
- Expansion into the Financial Services sector
- Order received from Standard Bank

Major Opportunities

- Eskom Mobility
- Multilinks Nigeria Clarity
- Eskom Distribution Mettenmeier NRM
- Eskom Maximo 7 Upgrade and Centralisation
- Neotel Cramer Phase 2

Threats

- Project delays, possibly leading to cancellations
- Tata Consulting Services' symbiotic relationship with Neotel
- Telkom's Outsource Program

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The Divisions

Powertech IST Energy : Products and Customers

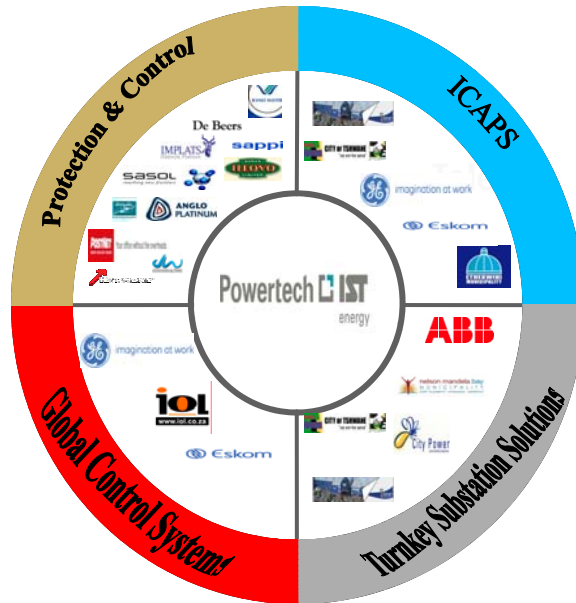


Electrical Power Infrastructure

- Telecontrol
- Protection
- ICAPS
- SCADA
- Turnkey substations
- Generator control systems

Customer Base

- Utilities
 - Eskom
 - Municipalities
 - Metros
 - REDS
- LPUs
 - Sasol
 - Anglo Gold



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The Divisions

Powertech IST Energy : Opportunities and Threats



Highlights

- Eskom Transmission Capacitor Bank and SCS ENCS
- City Power TKS contracts
- BPC TKS contracts
- Umeme (Uganda) DMS SCADA contract
- The Independent Newspaper Group Standby Power contracts

Major Opportunities

- Duvha Power Station TCS/DCS Refurbishment project
- City Power Substations
- Tshwane Electricity Substations
- Eskom Distribution Transformer Protection ENC

Threats

- Project delays, possibly leading to cancellations
- Competition from Technology Principals
- War for talent

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The Divisions

Powertech IST Industrial: Products and Customers



Environmental Technologies

- Off-Gas Filtration
- Flue Gas Cleaning
- Water Recovery
- Fluid Systems
- Standby Power Generation



Partners

- GE Energy (USA)
- Korea Cottrell (Korea)
- Paques (Holland)
- GEA Emission Control
- MECS (USA)

Customer Base

- 4M's & 2P's



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The Divisions

Powertech IST Industrial: Opportunities and Threats



Highlights

- Anglo Platinum Emergency Generator contract
- Impala Platinum wet/Dry ESP project

Major Opportunities

- Eskom Ingula Pumped Storage Scheme
- Lonmin Wet ESP/Scrubbers
- TWP WLLG Offgas Treatment
- Eskom Kusile FDG via Hitachi
- Idwala Lime Baghouse (

Threats

- Reduction of Capex projects
- War for talent

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The Divisions

Powertech IST Otokon: Products and Customers

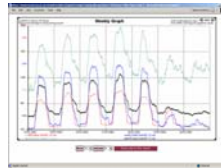


Energy Management

- Energy management systems
- Automated meter reading
- Demand Side Management
- Energy Efficiency
- Cogeneration

Customer Base

- Eskom
- Mining
- Industry
- Other Large Power Users



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The Divisions

Powertech IST Otokon: Opportunities and Threats



Highlights

- Eskom Metering ENC
- DSM basket of contracts
- Anglo Platinum Metering sub-contract

Major Opportunities

- Smart Metering
- Co-generation
- Anglo Platinum and Goldfields Heat Pumps
- Mauritius Metering

Threats

- Project delays, possibly leading to cancellations
- Dwindling Eskom DSM funding
- Competition from Technology Principals

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The Divisions

Powertech IST Telecom: Products and Customers



Telecoms Equipment

- Access networks
- Optical Access and Core
- Wireless Networks
- Power back-up
- Telco VoIP
- Value Added Services

Customer Base

- Telkom
- Eskom
- Vodacom
- iBurst
- MTN



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The Divisions

Powertech IST Telecom: Opportunities and Threats



Highlights

- Telkom Turnkey Services contracts
- Version 2 outdoor cabinets for Telkom
- Fuel Cell Sales growth

Major Opportunities

- Sentech Broadband Network
- Eskom Medupi DC Power System
- Eskom Telecom SDH Network
- Telkom MSAN project
- Telkom IFMC project

Threats

- Telkom's insistence on OEM equity stakes in bidding entities
- Competition from Technology Principals
- TCS' symbiotic relationship with Neotel

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Questions / Closure



Thank you

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