CURRICULUM VITAE

NAME:	**Marylla G Govender**
DATE OF BIRTH	1971
NATIONALITY	South Africa
TERTIARY QUALIFICATIONS:	1997 - MA(Econ) Economics, University of Manchester 1995 - MCom (Econ)(*cum laude*), University of KwaZulu-Natal, Westville campus 1992 - BCom (Hon)(*cum laude*), University of KwaZulu-Natal, Westville campus 1991 – BCom, University of KwaZulu-Natal, Westville campus
LANGUAGES:	English

KEY HIGHLIGHTS OF WORK EXPERIENCE:

Marylla Govender is an experienced consultant who has specialist skills in strategy, competition and regulation. Marylla is currently an independent economic consultant and has in the past year been involved in a number of competition and regulation assessment projects in the various sectors of the mining industry, pharmaceutical industry, financial services as well as the fast moving consumer goods industry.

Prior to this, Marylla has been involved in a number of projects in Andersen's Strategy Finance and Economic division in general as well as specifically in the Competition and Regulation area. Her projects at Andersen in the field of Competition and Regulation included work undertaken in the petroleum and energy sector, pharmaceutical and consumer care industry and the minerals and metals sector.

Marylla worked also in KPMG's Global Economic Consulting division, were she was involved as a senior consultant on a number of transfer pricing projects in the pharmaceutical and industrial products sectors. Marylla's previous work experience also includes being a senior analyst in the Policy and Research division of the Competition Commission where she worked on projects relating to the implementation of the Competition Act, specifically in Financial and Banking Regulation.

Marylla also worked as an economist for Ithala Development Finance Corporation. As economist to the corporation, Marylla was involved in a number of development

projects and programmes aimed at encouraging and facilitating private sector investment in KwaZulu-Natal.

PROFESSIONAL HISTORY:

2003–present	Independent Economic Consultant
2001 – 2002	Managing Consultant, KPMG Consulting (and predecessor firm Andersen)
2000(July) – 2001	Senior Consultant(Economist), KPMG Global Transfer Pricing Services
2000(Jan)- 2000(July)	Senior Analyst, Policy and Research Division, Competition Commission
1998 -1999	Economist, Ithala Development Finance Corporation
1994 -1998	Lecturer, University of KwaZulu-Natal (predecessor Durban-Westville)

PROJECT EXPERIENCE:

Examples and project details are provided below.

Webber Wentzel Bowens

An independent consultant to various law firms most notably Webber Wentzel Bowens, Competition Law Department. Have assisted a number of clients across a range of industry, particularly in relation to assessing the competitive effect of mergers in certain market and in respect of competition-related complaints. Industries and sectors include mining, petroleum, franchising, financial services, healthcare, pharmaceuticals and chemicals.

Submission of application together with assessment for pharmaceutical client wishing to apply for incentives under the DTI's Strategic Industrial Project

The project entailed an assessment of the manufacturing investment required to upgrade the clients production facilities together with the microeconomic as well as the wider macroeconomic as effect.

Submissions on behalf on other legal clients in respect of the Competition Act

- Assessment of competition implications of a proposed transaction in respect of the steel market
- Assessment of competition implication of a proposed merger between Sasol/Engen. This was a preliminary assessment undertaken for a South African subsidiary of a multi-national petroleum company

Submission to the Department of Health on price control legislation in the pharmaceutical industry

In 2004 conducted an assessment of the implications of proposed price control legislation on the pharmaceutical industry. The submission includes assessing the merits of government intervention in free markets and the impact of the proposed legislation on a South African based pharmaceutical company ("the client") and suggestions on way forward.

In 2006 follow-up submission was undertaken on behalf of the client in regard to determining the appropriate logistics fee, price increase and benchmarking methodology.

Shell South Africa

Conducted a market and competition analysis of the merger between Shell SA and Tepco which formed part of a submission to the Competition Commission. The main motivation for this transaction is to enable a multinational firm in the petroleum products industry, Shell SA, to comply with the obligations with regard to black economic empowerment placed on it by the "White Paper on Energy Policy of the Republic of South Africa" and the "Charter for the South African Petroleum and Liquid Fuels Industry on Empowering Historically Disadvantaged South Africans in the Petroleum and Liquid Fuels Industry". The market and competition study entailed an industry overview of the petroleum products industry with a view to determining the nature of competition in this sector.

Anglo American plc

The work involved project team members analysis ten product markets within the minerals and metals sector, including the iron ore coal and platinum markets. This involved market research and analysis for each of the products within the sectors as well as an assessment of public interest concerns relating to the ability of national industries to participate in international markets.

Eskom Treasury

The eminent restructuring of the South African Electricity Supply and Distribution industries prompted Eskom Treasury to evaluate their strategic position within the Eskom Group and the South African utilities and financial services markets. The strategic evaluation concentrated on leveraging existing and finding new opportunities for value creation. Involved in phase 2 of this project which entailed a customer segmentation study and an analysis of requirements for implementation of strategy i.e. service level agreements.

Coal industry competition assessment

Project management and market review of the nature of competition in the South African coal industry, with the view to assessing the potential competition implications of a South Africa coal company merging with a Black Economic Empowerment partner. This included an assessment of the coal supply chain as well as definition of the relevant product and geographic market with respect to thermal and metallurgical coal.

Manufacturing outsourcing in the pharmaceutical industry

An initial assessment of the economic and competition implications of a manufacturing outsourcing agreement for a major South African pharmaceutical company.

Strategy project in the digital satellite industry

A two-phase project for a company in the digital satellite broadcasting industry. Involved in both phases of the project, which spanned intermittently over a year. The first phase involved contextualing and localising the company's global business plan in terms of its relevance to the South African and the wider Southern Africa markets by understanding which market segments and product/service offerings which are attractive in terms of their earnings potential. Project managed the second phase of the project which involved developing a Market Strategy for the African continent based on the solutions developed in Phase 1.

Other projects

- Internal study for Ithala Development Finance Corporation assessing key development finance indicators and the appropriateness of these indicators to its internal reporting requirements
- Income and expenditure study for selected areas in the KZN region. The underlying rationale for this project was to assist Ithala Development Finance Corporation with its small business loan application process
- Transfer pricing project for a major multinational pharmaceutical client.
- Transfer pricing project for a major multinational client distributing industrial products.