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Accenture Technology Vision 2020

Communications & Media
perspectives from industry experts

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Mathangi Sandilya
Managing Director at Accenture

Creating new connections

People's love (and need) for technology has let businesses weave that technology—and the businesses themselves—into our lives. While this has transformed how we work, live and interact with the world, it's important to recognize that this love for technology is not unconditional. Looking to the longer term, it's increasingly clear that communications service providers (CSPs) cannot assume that the customer is always looking for the latest tech or the best-of-the-best upgrade. They also want a sense of comfort and confidence that everything will just work as expected.

Consumers' changing relationship with technology

For this year's Technology Vision research, we surveyed over 500 CSP executives, along with 2,000+ consumers worldwide. One of the principal findings is that, very clearly, people's relationships with technology are changing.

Seventy percent of consumers globally expect their relationship with technology to be more prominent in their lives over the next three years*.

It's a trend that will likely be even more pronounced as a result of COVID-19, bearing in mind how heavily people have relied on technology to sustain connections in recent months.

But this does not imply blind love for technology. Our research also found that consumers increasingly expect businesses to recognize the inter-dependency between what they do and the people they serve and adapt their services accordingly.

The 2020 Technology Vision explores how this will play out across five core themes—The I in Experience, AI and Me, The Dilemma of Smart Things, Robots in the Wild and Innovation DNA.

These provide a road-map for organizations to rethink their approach, and how and where they need to focus their innovative energies over the next three to five years. Leading in the future will demand rethinking core assumptions about the intersection between people and technology and our Accenture industry leaders will examine the impact of this on CSPs in greater detail in this blog series.

Disruptive change for CSPs' technology backbones

At a high level, however, it is evident that disruptions to the technology backbones of CSPs are set to accelerate. Technology is not just central to people's lives, after all. It is also central to how CSPs operate in order to deliver human-centered experiences that are going to be increasingly essential to thrive. CSPs should anticipate

disruptive change in three key areas: First, software and virtualized networks. Right now, companies' core structure and operations for network deployment are very cost intensive. That will need to change and 5G will intensify the pressure. Second, AI. CSPs need to maximize their adoption of these technologies—81 percent of communications companies have already piloted or adopted AI*. That will continue to surge. And third, we'll see leading companies recognizing how they can combine different technology elements throughout their ecosystems—from cloud to AI—for competitive advantage.

A double-edged sword

Dealing next with the major challenges CSPs will face, it is clear that technology is the answer to most of them. But this is a double-edged sword. CSPs already have a lot of investment riding on their existing technology. The advent of 5G means multiple new disruptive players entering the market. To reposition themselves as orchestrators in this new world, CSPs will need a nimbler approach to technology.

The promise of a world made better and easier by technology is being trapped behind models, architectures and governing structures that have neither realized their full potential nor created adequate value—leaving companies out of sync with people's needs and expectations. It's an interesting dichotomy.

To move forward, the emphasis needs to be on building trust with customers. That means achieving a harmonious balance between innovation, privacy and security.

Building trust

CSPs play a key and responsible role in enabling their customers' digital journeys and, as a result, have access to enormous amounts of personal

data. To build trust, they need to be careful custodians of this data, while bearing in mind that although the market potential of this resource is huge, it is nevertheless a market comprised of individuals. So, the approach to personalization really matters. It needs to be achieved through human-centric design of new offerings with the individual customer (and their concerns around privacy) at the center.

We have seen most CSPs taking this route during the pandemic, whether that has been by removing data limits, providing greater flexibility on renewals or giving priority access to first responders. We've also seen an increase in the use of virtual agents, transitioning to human agents only when needed. And to maintain social distancing in the field, CSPs have been scaling the use of digitally assisted self-service and installation capabilities. These are all trends that we're likely to see more of in the coming months.

Accelerating transformation

We will also see an acceleration in digital transformations that were already underway. And as 5G activates across the globe, there will be an increase in network slicing, despite potential roll-out delays because of COVID-19. Having already prioritized network access to key users during the crisis, CSPs will, moving forward, be able to better transition between open networks and top-quality services.

The Communications industry is changing fast and has seen the pandemic accelerate the pace of change.

In subsequent blogs by my colleagues, we'll be drilling down into a few key themes from the Technology Vision research that look more closely at future disruptions. Read on and share your thoughts.

*Accenture Research global survey of 522 Communications business and IT executives to capture insights into the adoption of emerging technologies. The survey, fielded from November 2019 through January 2020, helped identify the key issues and priorities for technology adoption and investment. Respondents were C-level executives and directors at companies across 25 countries, with the majority having annual revenues greater than US\$5 billion.

To learn more:

Accenture Technology Vision 2020 Full Report
Technology Vision 2020 COVID-19 Update
Accenture Communications and Media



Adriano Poloni
Managing Director at Accenture

Hyper-connected ecosystems - the key to innovation

The rules around innovation will never be the same. For communications service providers (CSPs), failing to change with the world always meant falling behind. But now, a key impact of COVID-19 is that the world necessitates business resilience at the core and extraordinary agility at the edge, faster than anyone could have expected. Incremental innovation is no longer enough.

CSPs need new approaches that harness and combine existing digital capabilities, industry & scientific advances and emerging technologies (like blockchain, AI and extended reality) in new, synergistic ways.

In other words, they need a new “Innovation DNA” that pushes the boundaries and accelerates the ability to embrace new practices and business models.

It's one of the five core trends in the Accenture Technology Vision 2020 research. And it's extraordinarily relevant to CSPs as they push forward into a new, in many ways uncharted, world. Consider how CSPs have quickly pivoted their operation field force during the pandemic, reorganizing into “sheltered” squads (securing

resilience in core service levels) and accelerating the already ongoing adoption of insight-driven service management toolsets.

To make progress on this journey and develop the innovations that will keep them in front, they'll need to overcome some roadblocks. One of the most challenging of these is cumulated technical debt, the costs incurred from adopting ad hoc, siloed solutions over time. Resulting from 20-plus years of system stratification, CSPs' technology architectures are too often built for “quick fix” changes to meet short term business needs. This makes them very expensive to run (Gartner predicts that rework costs will account for 40 percent of CSPs' IT budgets by 2025*). But there's a bigger problem: these architectures undermine the agility needed to innovate – exactly when that agility is needed most.

Seventy-five percent of CSP executives in our research told us that the stakes for innovation have never been higher**. The reason? Having been one of the first industries to be disrupted by digital 10-plus years ago, Communications now has the chance to catch up with the mega-platforms and ride the next wave of change.

*Source: Gartner, *Application Modernization Should Be Business-Centric*, 15 August 2019, ID G00430084

**Accenture Research global survey of 522 Communications business and IT executives to capture insights into the adoption of emerging technologies. The survey, fielded from November 2019 through January 2020, helped identify the key issues and priorities for technology adoption and investment. Respondents were C-level executives and directors at companies across 25 countries, with the majority having annual revenues greater than US\$5 billion.

The catalyst is 5G's imminent arrival, which promises huge opportunities for the industry, like attuned quality of service with network slicing, as well as the ability to create entirely new industry-specific business models.

Having weathered digital disruption up to this point, CSPs should be well-placed to seize these opportunities. After all, years of cost-cutting and rightsizing mean that they're lean and optimized in many areas of their businesses. But as long as technical debt persists, it's going to make it much more challenging to compete (and collaborate) with the surge of nimble new market entrants that 5G promises to unleash.

Look at how technical debt has got in the way up to this point, for example, the industry's experience with blockchain. As one of the emerging DARQ technologies (Distributed ledgers, Artificial intelligence, extended Reality, and Quantum computing) we highlight in the Technology Vision report, distributed ledger promises enormous potential to secure and empower ecosystem connections (leveraging effective data mutualization and transfer of value). But most CSPs have struggled to adopt this technology because of dysfunctional legacy systems, with siloed and inaccessible data, missing out on quick-win opportunities such as efficiency improvements across supply chain operations.

To innovate at the speed and scale that will be critical, leading CSPs are making a radical shift to product owner mindset, embracing modern software engineering tools and methods, to evolve towards open architectures. These should be loosely coupled, cloud-based, data- and rules-driven – made up of standard components that can be cheaply and easily procured and deployed.

Strategies must be built for speed and agility. Closed-door approaches will be too slow. To develop powerful innovation engines, CSPs need to look outward and understand the advances happening around them while also focusing on developing their innovation-minded internal talent and exploring the right balance between insourcing and co-sourcing. Well-executed strategies will not only explore and combine the core building-blocks of innovation DNA, but also accelerate the discovery process by forging new partnerships, fuelling experimentation, and building a culture and ecosystem that will drive those efforts into disruption at scale.

5G is a perfect arena where all this can come together. It's a sweet-spot right at the heart of CSPs' networks.

By forming their own unique innovation DNA, CSPs will put themselves in an outstanding position to capitalize on the opportunities that 5G brings.

Do you see 5G as the driving force for organizations pushing innovation at greater speeds, or do you think there are additional factors?

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John Peters
Managing Director at Accenture

Talking back to the algorithm - why streaming consumers must be given control

Here we are: sheltering in place, hunkered down with our remotes, consuming more content than ever before. This should be OTT's moment! The promised personalization of cord-cutting and algorithms – watching what I want, and only what I want, when I want, for a price that seems appropriate for what I consume – should be paying off big time, right? Then why am I so frustrated? I love my streaming services, however, it's apparent we still have a long way to go before the promise of personalization pays off.

Let's break down the personalization promise problem into three buckets:

1. Complexity of navigating “rabbit holes” across a growing number of services.
2. New bundles that increasingly seem as inefficient as the cable bundles we fled.
3. Scattered algorithms with incomplete information missing the mark on recommendations.

How can media businesses move from black-box algorithms and fragmented, “rabbit-hole” experiences to meaningful personalization that keeps customers engaged? Accenture's Technology Vision 2020 examines this question and unearths important insights. The I in Experience trend recognizes that businesses are

going to have to find ways to return a significant degree of agency to their customers, putting them in the driving seat. And as COVID-19 has transformed the role that digital experiences play in people's lives, that control has never been more important. Let's see what this means for the future of OTT streaming – and for me and my remote.

What a pain in the finger

60% of consumers have increased their time streaming video, compared to before the pandemic*. As a result, streaming services have seen a massive growth. But growth is creating complexity. As we adopt more services, finding what we're interested in often requires manually browsing through a glut of platforms, screens and menus until we eventually find what we're after. Smart TVs allow us to combine cable channels with OTT services, but navigating between them is like travelling through separate rabbit holes. Each has its own entry and exit, and its own UI and navigation paths. Even all of my “Keep Watching” content is scattered across the many platforms to which I'm subscribed. The result? What a pain in the finger! To find the right personalized experience, audiences must deal with significant complexity.

In a world with greater agency, how can I more easily navigate across the rabbit holes?

My price-value antenna is starting to tingle

As OTT adoption grows, we are hit with monthly payments for an increasing number of services. Consumer studies show that an upper limit exists on the amount of money consumers will spend for all these services**. Cord-cutters did not cut the cord because of inconvenience, they cut because they challenged the value of paying for a myriad of channels that they never watched. Today, I'm paying for 100% of Netflix's catalog but only watch a portion of the available titles. To date, price sensitivity has been low, since most platforms charge \$6-\$10 per month. But now that I have upwards of 200+ of these in the U.S. alone, that math is starting to add up. Each service is its own bundle of shows, and today, most services only offer one bundle.

In a world with greater agency, I have more choice within a service to only pay for what I want.

If only your remote could talk

Meanwhile, no one really knows me. Tellingly, each platform that I've engaged with knows what I watched yesterday and what I watched today – but only on their platform. No one, except my humble remote, knows everything that I watched. The result is a number of well-meaning algorithms generating recommendations based on incomplete viewing history.

Plus, the lean-back reliance on the algorithm to pitch me shows does not provide me with agency to tune the model, except through actual show selection. If only my remote could talk. Imagine the strength of the recommendations if each service's algorithm knew the real me!

In a world with greater agency, I can talk back to the algorithm.

Out of the rabbit hole

As we cut the cord, we are all moving to an à la carte world in which we select and spend money on the services we want – and that is, to some

extent, expressing our agency. But that shift creates its own complexity. The same problem that drove people away from bundled cable deals is actually magnified by several orders of magnitude in the new multi-platform streaming world.

There's no way, yet, of stitching together those different experiences into a single smart experience that makes sense for me – and really gets to know me and what I want to watch. And executives in these companies agree. In our Technology Vision research, 77% of media executives said their organizations need to dramatically re-engineer the experiences that bring technology and people together in a more human-centric manner.

In a world with greater agency, there is a way to more meaningfully interject the "I" into experience

The agency layer

What would it mean to have a more seamless navigation and curation experience across streaming services created in collaboration with and for every individual? What would it mean to have an algorithm with access to my consolidated viewing history? To take it further, what if I could talk directly to the algorithm, giving explicit instructions and building a unique experience that's personalized for me, by me? My feedback is baked-in as a variable in the formula. Think of this as "the agency layer": a smart aggregator sitting across multiple platforms, dramatically increasing viewers' agency over the content they watch.

This could also change the way people pay for specific content, with a more flexible subscription model. Imagine if a single platform enabled anyone to select exactly what they wanted to watch, for example, categories of specific shows regardless of provider. Those choices would be reflected in a single menu that the user can constantly curate and change as the mood takes them. What would it mean to have greater bundle flexibility not only across OTT services, but also within services, say, to just buy a show series, or a category like reality cooking shows?

**Visual Objects survey report, *Cable vs Streaming: Cutting-the-Cord Options in 2020* | The Trade Desk and YouGov, *Think Beyond Linear, Think Connected TV*

Which companies are best positioned to deliver on this vision? Device or smart TV makers might make a go of it. Even cable companies could try to flip the script and become the integrator of cable and OTT services. Individual OTT services, through acquisition, could create an uber-OTT platform or a portfolio of OTT services that enable bundle flexibility, consolidated algorithms and seamless navigation.

However, a surging class of players seem particularly well positioned to create “the agency layer”. Aggregators like Roku are putting the pieces together. They provide access to the OTT services, have a navigation layer across the services and the ability to receive payment for the various services. Imagine what some APIs and data-sharing agreements can enable: a single rabbit hole with a single, fully informed algorithm, able to be personalized for what I want to see and pay for. You could even imagine the bundles going beyond just film/tv content to include music and podcast services, video games and other forms of entertainment. Music to my remote’s ears.

The end of the beginning

Winston Churchill, fresh from his first victories in World War II after years of defeat, said, “Now this is not the end. It is not even the beginning of the end. But it is perhaps the end of the beginning”. That’s where we are in the OTT game: just getting started. I believe that a better day is ahead for my remote and me. Above all, it’s clear that content providers need to make sure that the customer is in charge – taking control of their own personalization, rather than having fragmented, black-box algorithms, scattered across the rabbit holes, dictating all the plays.

How well positioned do you think your business is to provide the personalization consumers so clearly want?

[To learn more:](#)

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**Yusuf Tayob**

Senior Managing Director at Accenture

The I in experience - this time it's personal

Central to Accenture's Technology Vision 2020 is the need for companies to align their business strategy with the changing expectations of their customers. One of this year's five themes, The I in Experience, explores this new imperative in depth.

With digital experiences playing an increasingly significant role in people's lives, communication service providers (CSPs) will need to rethink their personalization game. The priority? To customize the products and services they offer based on the customer's current needs or interests.

It won't be enough to be service "providers". COVID-19 has transformed the way people think about digital experiences.

Customers will want CSPs to collaborate with them to shape new co-operative experiences.

The emphasis will need to be on "customer agency", allowing people to steer their own digital experiences. At the same time, customers will increasingly expect to know how and why their data is being used, and CSPs will need to

implement new, more transparent engagement models.

CSPs have often been challenged to stitch together customer data to create meaningful personalization. Although they hold vast amounts of data, it has often been siloed and primarily descriptive. In addition, years of M&A within the industry have only compounded this challenge by often creating disparate data lakes inside the business. CSPs recognize that this needs to change. In our research, 86% of communications executives believe that to compete in a post-digital world, organizations need to elevate their relationships with customers as partners. With the data collected, companies can build additional trust with their customers by creating more meaningful, customer-centric experiences that work for both parties, and turn descriptive data into predictive insights and prescriptive actions. It's important to remember that consumers who provide personal information expect something relevant and valuable in return.

Some companies are down the path through mergers and integration with traditional media companies which have historically leveraged more advanced personalization capabilities. AT&T and Comcast are two examples of such integration.

* <https://www.o2.co.uk/extras/disney-plus>

** <https://www.verizon.com/solutions-and-services/disneyplus>

Another way for CSPs to establish deeper relationships with new and existing customers will be through ecosystem partnerships.

For example, O2* in the UK and Verizon** in the US offer several months of free access to Disney+ to new/upgrading customers. Loyalty programs are another great route to keep customers satisfied and maintain sustainable relationships with the brand. Incentives like these encourage customers to share more information by engaging them as partners in their relationships with CSPs.

CSPs are also in position to bring added value to their customers through investment in services in the home, such as digital health. With people spending more time at home during this pandemic, CSPs have a unique opportunity to capitalize on all aspects of the home experience.

How are you seeing CSPs progressing towards evermore personalized experiences?

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Peri Shamsai
Managing Director at Accenture

AI and me - top 5 principles of AI for media & entertainment companies

Traditional media companies are building on the lessons from digital-first competitors and beginning to explore how to holistically and effectively integrate Artificial Intelligence (AI) across their business from content creation and curation to business operations.

Media and Entertainment (M&E) industry leaders are beginning to leverage AI to re-imagine and grow their businesses by enabling new methods of working and interacting with consumers, putting personalization at the heart of every experience.

But there's plenty of runway to expand. In fact, our Technology Vision 2020 research, found that just 20% of media organizations are preparing their workforce for collaborative, interactive, and explainable AI-based systems.

Accenture research highlights just how powerful AI will prove to be as a growth driver: we found that lost revenue because of lagging technology adoption creates a snowball effect. In 2018, "laggards" lost out on 15% in annual revenue and if they don't change, they could forfeit as much as 46% of revenues by 2023.

The power of this human + machine dynamic runs through "AI and Me", one of the key trends in the Accenture Technology Vision 2020.

And we believe it will become increasingly key to Media & Entertainment (M&E) companies with COVID-19 accelerating AI's relevance. Businesses and workers have, out of necessity, been looking to leverage AI more than ever. And this increased business need is unlikely to diminish once the pandemic is over.

Still in the early stages

There are many good examples of AI in customer-facing contexts. Digital-first companies like Netflix, Apple and Amazon have developed increasingly refined predictive capabilities and embedded them into their platforms in every way, from content recommendations to targeted advertising. Media companies are increasingly exploring similar applications. While this is a positive development, there are further opportunities to harness AI's power. This year's Technology Vision research shows that while 45% of media organizations are piloting AI or adopting it in one business unit, only 19% are taking a holistic approach by adopting it across multiple business units.

Where AI is being explored, some of the more interesting applications to date include:

- News agencies using AI to develop editorial content. For example, at Bloomberg News, almost one-third of published content is produced by journalists' and augmented with automated technologies*. Similarly, local newspapers are increasingly using AI to produce local sports stats, freeing up journalists to focus on research-driven stories.
- Studios and television companies are combining AI with sophisticated analytics in order to do predictive modeling around content curation to inform both content creation investment decision, as well as programming and editorial decisions.
- Media companies are increasingly building out analytics centers of excellence that leverage AI capabilities to target specific business areas that are deemed as yielding the best ROI for their companies.
- M&E corporate functions are beginning to explore integrating established AI processes into rote finance, HR and procurement functions, thereby gaining significant cost efficiencies to reinvest dollars in more value-driven activities.

These are exciting first steps yet embedding AI into processes Yet there are still many challenges to overcome, which include both selecting the technology in a constantly evolving marketplace, and applying AI to inherently complex operational processes, such as ad sales or royalty payments.

Specifically, while great savings can be achieved by applying AI to these processes, most applications offer only partial coverage.

Extending this coverage requires a complete redesign of the processes, roles and skills of the team engaged in these critical operational activities. The application of automation to

more mature AI-enabled processes, such as HR, finance and procurement, are clear candidates for extending AI coverage, while the more media-specific operational areas still have more work to be done. Core media and entertainment operational processes, such as advertising and royalties, currently use little-to-no automation and when automation is added, a great deal of work needs to be done to redesign processes and refine and retrain roles

AI can grow revenue, as well as cut cost

AI is simultaneously both a growth and a cost play. While cost is often the early focus, customer-centric growth must be the long-term goal and is essential for building a sustainable business case for AI. The positive impact on employee well-being and satisfaction should also be a key consideration. AI can eliminate repetitive manual tasks and free up people to focus on more engaging and rewarding work. What's more, COVID-19 and the imposed social distancing measures have demonstrated the resilience that AI can provide, enabling organizations to continue operations in the face of unexpected major disruption.

What's standing in the way of end-to-end implementation?

But realizing AI's extensive benefits depends on a systematic approach to adoption. Automation is most likely to succeed with standardized processes. There's still a belief that automation means identifying in-scope processes and developing bots specific to them.

However, smooth and successful integration of automation into the end-to-end business can be achieved only through a complete redesign of processes, roles and the organization itself.

*<https://www.nytimes.com/2019/02/05/business/media/artificial-intelligence-journalism-robots.html>

Furthermore, media operations pose very specific challenges, as many processes do not have end-to-end opportunities for automation. In these contexts, bots and people need to work seamlessly together, which requires a comprehensive rethink of respective team members' processes and roles.

Many media companies are therefore realizing only part of AI's benefits and ultimately, therefore, their people's potential as well. By finding more collaborative use cases and building the capabilities needed for AI and people to work together seamlessly, companies will amplify the best qualities of both. But for now, there's still a long way to go.

Achieving enterprise-wide AI

For a traditional media company to reap the benefits of automation, it needs to implement AI in a systematic and effective way – across all processes (front-end and back-end).

For the moment, and in common with many companies in other industries, those that are doing so are in a minority. Only 25% of organizations worldwide that are already using AI solutions have developed an enterprise-wide AI strategy**.

Our experience reveals the Top 5 Lessons Learned for Media and Entertainment companies to maximize their enterprise-wide benefits from their AI investments are:

1. Start with the business case, building a comprehensive picture of ROI based on both revenue and costs for all areas of the business, especially those where the value unclear and then track value realization vigilantly after go-live
2. Treat automation as a transformational initiative, examining process, organization and technology holistically
3. Explore embarking on large-scale automation for processes with established and mature AI applications, such as Finance and Procurement
4. Take a "continuous improvement" approach, realizing that AI development is not simply one-and-done
5. Build an automation center of excellence, with both onshore and offshore capabilities, that can service and improve, as well as build and release, automation throughout the organization.

How advanced is your progress toward broad AI implementation? Where do you see the biggest challenges? I would love to hear from you.

**IDC global survey of 2,473 organizations, May 2019

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Miguel Myhrer
Managing Director at Accenture

5G expectations are high - “Smart Things” need to evolve to meet them

Enterprises in numerous industries are preparing their product development teams for 5G and the dramatic increase in connected “smart things” with 10x the volume of data traveling through them. As they do this, they also need to focus on designing products that consider their customers’ expanded service expectations.

To succeed, they must factor in the “beta burden”, a concept at the heart of Accenture’s 2020 Technology Vision and, specifically, the “Dilemma of Smart Things” trend. Customers are already accustomed to the frustration of continuous product software and hardware updates, but the speed at which these will occur with 5G will be ongoing, or as we call it “a state of ‘forever beta’”.

If we expect buy-in to ‘forever beta’ connected things across both consumer and industrial settings, these devices will be expected to respond and adjust to variable user demands at a moment’s notice. This will set the stage for responsive feedback loops with truly smart things that support meaningful connections and enable service and experience expansion in the future.

With 5G originating from the communications industry, we’re seeing leading communications companies positioning themselves as enablers and implementers of the new world of “things”.

To take advantage of the new associated technologies and their beta burdens, communications companies will be the guides for inventors and their approach to consumer devices, both for personal use (e.g., devices in the home) and as part of the greater connected environment (e.g., private 5G networks for specific industries including mining, oil & gas, or manufacturing). By designing products that can be updated remotely, users will see increased value in the value, utility, and ubiquity potential of products.

Setting the stage for leadership in consumer 5G

As the COVID-19 pandemic swept across the globe, we saw consumers rely on digital technologies to an unprecedented degree. For example, an Accenture survey on the pandemic’s impact on the Communications & Media industries revealed that 59% of consumers had invested in home automation systems*. Increased comfort with and dependence on these technologies has boosted usage enormously. And we expect usage to rise even more with the roll-outs of 5G and fiber, which bring with them far greater bandwidth and near-ubiquitous connectivity. This gives communications providers an outstanding opportunity to be much more than platforms for connectivity. Provided they are prepared for the impacts of 5G and fiber on usage and consumer expectations, providers can reclaim their seats

at the innovation table, alongside the digital-first businesses that have dominated product and service innovation over the past decade.

So, how to address this beta burden challenge in a way that's not just a B2C solution, but also for B2B2C?

There are three connected priorities: re-framing enterprise relationships, changing the mindset for enterprise customer service, their customers, and activating new operating models.

Re-framing enterprise relationships

If they are to re-assume their leadership role, communications providers must change their innovation culture. This requires a mindset shift. It's not just about "enabling 5G," but also asking "what will 5G enable?"

To accelerate innovation in this space, more progressive communications providers will build relationships with digital-first businesses, broadcasters and other ecosystem players to explore how 5G can enable a whole new user experience. It's an urgent priority, not just for the industry but for all of society. After all, post-COVID-19, we're going to need the 8 currencies of connectivity (as described by Verizon) more than ever, so don't expect to see the pace of 5G rollout slowing down. If anything, it's likely to pick up dramatically.

A new mindset for enterprise customer service

These new ecosystem relationships will underpin novel perspectives and strategies. As the focus turns to selling continuous experiences enabled by ubiquitous connectivity between users and their devices, companies will require strategies that encompass the products they support for those experiences – particularly as their service capabilities continuously expand.

Communications providers are already trusted by consumers, but for ongoing success in this new era of smart things and their evolving capabilities, they will need to further inspire loyalty and continued engagement across multiple industries

servicing large and small enterprises and their customers, that is, with a B2B2C mindset.

New operating models, new skills

To realize the opportunities of 5G, communications providers will need to put in place new operating models and acquire new skills. If they're to hold higher-level discussions as business advisors to their enterprise clients, they need to hire new talent with specific industry knowledge to bring this vision to life and help re-imagine experiences. Meanwhile, on the product side, their employees must be ready for developments that are industry specific, technology relevant, and incorporate the components of the "5G Platform" that brings this new business vision to life.

Instead of having client discussions limited to how much bandwidth or latency they require, communications companies can re-frame the entire dialogue. But to do so, they'll have to not only transform the relationship between their internal groups (Product Management, Product Engineering, IT, Network) while they transform the type of dialogues with their enterprise customers.

Harnessing the 5G advantage

During the COVID-19 pandemic, communications companies have shown how agile they can be under pressure. Leaders rapidly introduced digitally enabled, immersive new retail and home repair experiences, rolling out AR, VR, and self-service technologies at unprecedented speed and scale. Their innovation at speed to meet the demands of the moment highlighted how smart things are both a current necessity and a long-term consumer expectation. It also provided many communications providers with a big boost in trust and customer loyalty – among individual consumers, SMBs and large enterprise clients. Trust, in my opinion, is the 9th 5G currency – for both businesses and consumers.

With a new approach to designing and powering their products for everyday consumers and enterprise clients, communications providers can

play a key role in helping whole industries thrive. They are positioned to be part of the solution to overcome the beta burden challenge – viewed as partners that help users exploit the value and utility of products that keep on growing smarter.

As 5G enables the next generations of smart things across consumer and enterprise, what steps are you taking in your industry?

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About the Accenture Technology Vision

Every year, the Technology Vision team partners with Accenture Research to pinpoint the emerging IT developments that will have the greatest impact on companies, government agencies and other organizations in the coming years. These trends have significant impact across industries and are actionable for businesses today.

The research process begins by gathering input from the Technology Vision External Advisory Board, a group of more than two dozen experienced individuals from the public and private sectors, academia, venture capital and entrepreneurial companies. In addition, the Technology Vision team conducts interviews with technology luminaries and industry experts, as well as nearly 100 Accenture business leaders from across the organization.

The research process also includes a global survey of thousands of business and IT executives, to understand their perspectives on the impact of technology in business. Survey responses help to identify the technology strategies and priority investments of companies from across industries and geographies. Accenture Research interviewed more than 6,074 executives from 25 countries and 21 industries, including 85 health payer and 174 health provider executives in the US, UK and Australia. The survey was fielded from November 2019 through January 2020.

In parallel, a consumer survey was conducted to understand the use and role of technology in people's lives. Accenture Research surveyed 2,000 people in the US, UK, China and India with respondents representing different age and demographic groups.

About Accenture

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