UNLEASHING EXPONENTIAL EVOLUTION

2019 ERP Trends
Based on the UK ERP Trends Survey by the Accenture SAP Business Group
INTRODUCTION

HOW TO UNLEASH THE POTENTIAL OF YOUR DIGITAL INITIATIVES WITH INTELLIGENT ERP

Technology continues to evolve at an astonishing rate. Companies are struggling to keep pace with this digital revolution with enterprise technologies that are inflexible and increasingly obsolete, while customers are increasingly demanding improved quality, speed of service and personalisation.

Many organisations are already transforming to meet this challenge head-on. They are reinventing and reimagining the way they do business, boldly embracing change at the core of their enterprise IT.

Our recent ERP survey of CIOs across the UK reveals a clear consensus: they refuse to let core inflexibility impede holistic digital transformation. They empower their organisation to be future-aligned and core-nimble to chase business ambitions.

We invite you to explore “Unleashing Exponential Evolution” our view of five key trends driving change in the ERP landscape. (See diagram on page 7). Our report focuses on the developments in the SAP ERP space and draws on our extensive experience as SAP’s distinguished implementation partner and our broad experience in helping clients create business value from SAP-based programs. We look forward to supporting your digital transformation and helping you unleash the potential of your digital initiatives.

JOHN ERIK ELLINGSEN
Managing Director – SAP Business Group Lead UK and Ireland
UNLEASHING EXPONENTIAL EVOLUTION

Chances are, your organisation is already on the path to digital transformation – focussed on leveraging new technologies in order to cater to changing customer demands. In the pursuit of a digital experience, though, are you also evolving your core systems – the key transactional systems that your business depends on? If not, you may be limiting the potential of your digital transformation.

A BOUNDARYLESS DIGITAL TRANSFORMATION
This is how some CXOs are putting the ‘heart’ back into their digital transformation – by ensuring that they evolve their core systems in tandem with their customer-facing systems and – in the process – eliminating boundaries.

Consider Sky1 – a leading entertainment company serving 22.9 million subscribers across Europe. Following the merger of Sky UK with Sky Italia and Sky Deutschland, Sky’s Group Procurement team, under the leadership of Fabio Francalancia, Chief Procurement Officer, set out a bold vision: to create a next generation commercial purchasing function, building on a robust and digital focussed capability, by providing leading class tools and processes. They adopted a three-stage transformation that helped the company transform from the core to the edges. In the first phase, SAP Ariba Sourcing and Supplier Management was implemented for all three countries to create a single European platform for strategic sourcing. In the second phase, SAP Ariba Contracts was deployed for all three countries, extending the already deployed strategic sourcing capabilities. SAP Ariba Buying and Guided Buying were also integrated with Sky’s existing ERP solutions in Germany and Italy. The third phase saw the integration of SAP Ariba applications with Sky’s new SAP ERP on HANA backend system for a streamlined end-to-end Procure to Pay solution. Today, Sky is benefitting from a completely transformed experience that brings together its Procurement and Sourcing functions in a single European solution that facilitates a simple, smart and elegant buying experience, increases user engagement and drives process, contract and policy compliance.

The key to a boundaryless transformation strategy is a relentless focus on Enterprise Resource Planning (ERP) systems – the systems that run mission-critical processes such as financials, planning, HR, supply chain and logistics.

When your organisation’s core systems are capable of driving innovation and agility, then you can sprint ahead of the pack. Rather than being shackled by out-dated systems that hinder rather than empower, you can make sweeping changes boldly and be ambitious in your targets.

Overwhelmingly, across industries, ‘digital’ initiatives zone in on customer-facing functions such as marketing, sales, and user-experience, both in mindshare and in investments and, since organisations are continually being pushed to improve their engagement with customers, this is not surprising.

Enterprise IT is, however, a team sport – not a disjointed collection of star players. Forrester, a leading analyst firm, finds an alarming digital divide within many companies. Marketers develop nimble software to give customers an engaging, personalised experience, while IT departments remain harnessed to legacy infrastructure. In these cases, the front and back ends don’t work together, and this often results in appealing websites and apps that don’t quite deliver.2

Digitally pragmatic CIOs and CEOs understand that digitising customer-facing systems and processes without revamping or remodelling the underlying core systems lead to a two-fold disadvantage: unlocking only a percentage of the company’s potential while sowing the seeds for a ‘legacy of the future’. They know that a common digital fabric underpins their ability to enable holistic transformation that can surface data/intelligence from the core right out to the edges of their organisation.

Vinci Energies, a 10-billion-euro company with more than 830 legal entities, agrees. Vinci Energies is a division of the largest construction company in the world (Vinci SA), providing the engineering that connects the United Kingdom and Republic of Ireland’s electrical, communication and industrial networks. The company chose to embrace a holistic business transformation – and its journey began with the implementation of a new ERP system. More than three years on from its first steps, the company is already close to completing 70% of its global SAP platform rollout. This SAP Platform is their digital core: it strengthens their acquisition strategy, it provides agility to build new services such as cloud for service and internet of things (IoT) and it delivers stronger business value to end-customers.

A boundaryless transformation strategy is the very opposite of ripping-and-replacing core systems every few years. Instead, it empowers organisations to evolve and refresh systematically, enabling the flexibility to incorporate rapid technology changes as they arrive. An agile core is key to surviving and thriving in an era of rapid innovation, allowing for continuous modernisation and the ability to leverage progressive improvements in next-generation ERP technology.

Our CIO survey reveals a clear consensus: they refuse to let core inflexibility get in the way of holistic digital transformation. Being future-aligned and core-nimble is empowering.

Core-nimble organisations can chase ambitious business models or restructure existing businesses entirely, like Assala Energy3, which acquired and integrated diverse assets previously owned by Shell and which had been running for some 40 years. Their solution was to evolve to a new SAP S/4HANA Oil & Gas solution on SAP HANA Enterprise Cloud and to adopt SAP SuccessFactors solutions. The company’s new platform now underpins payroll and 40 other core applications while removing excess overheads and freeing up time for employees to devote to core business activities.

Accenture’s 2019 Trends Analysis has identified five key actions that we believe will be crucial in future ERP evolutions. In combination or alone each has the ability significantly to transform your business models.

Understanding them may help you to direct your digital transformation more effectively, and with fewer constraints.

**ERP TRENDS**

1. **TREAT CLOUD AS THE GATEWAY TO MODERNISATION**
   Develop a nuanced cloud strategy that suits your business ambitions. Engineer cloud as part of a larger strategy around digital transformation, cost savings and new business models.

2. **MAKE YOUR CORE INTELLIGENT AND EXTENDED**
   Invest in intelligence and automation – powered by AI, machine-learning, and analytics: not as an add-on but as a core part of your ERP platform. Enable your business to extend at scale and in real-time.

3. **PARTNER WITH CLOUD CAPTAINS, NOT TRADITIONAL SERVICES FIRMS**
   Find co-creation partners that differentiate by reimagining services delivery models, being technology agnostic, and specialising in your business.

4. **PERSONALISE**
   Make user experience (UX) seamless across channels and platforms and personalise relentlessly.

5. **AMPLIFY INSIGHTS BY CONVERGING DATA**
   Treat data as an asset. Free up the data in your ERP systems and converge different data sources for deeper intelligence.

These five trends are fundamentally important. Together they can enable you to bring about change both in your technology and your business. Enterprises should thus assess their relative position against each trend, evaluating how they currently fare and forming a plan for a journey from “as-is” to “north star”. Each organisation’s path to creating flexibility at the heart of the business may differ, and that’s fine.
1

TREAT CLOUD AS THE GATEWAY TO MODERNISATION
Cloud is the future of most business applications, including ERP. Our CIO survey finds 78% of UK CIOs believe that cloud is critical to their IT strategy and corporate strategy, and 50% say they are already running a hybrid cloud ERP and reaping its rewards of Total Cost of Ownership (TCO) reduction and increased agility.

We understand that wholesale, radical digital revolution is not always possible or affordable. The focus is then on ambitious evolution. **Cloud is the future, but everyone moves at their own pace - ensuring that all enhancements are compatible with and beneficial for core ERP processes.**

**THERE IS NO “ONE-SIZE-FITS-ALL”**

Every organisation needs to move at a pace they are comfortable with, balancing the change required with the benefit and reward that can be achieved. Migrating an ERP - the backbone of an enterprise - to the cloud is arguably more involved than migrating an edge system such as customer relationship management, which deals only with one aspect of how an enterprise functions.

While adopting the cloud, some organisations will prioritise by separating and migrating some modules or functions to the cloud first (such as human capital management), while the remainder continue to stay on-premise. Other organisations will move a critical mass of their business applications to the cloud, finding little sense in retaining core systems on-premise. Both these paths are viable: what you select will depend on the specific context for your industry and company. 61% of UK CIOs from our survey report that they have more than half of their data and applications in the cloud already, but only 6% are planning to be exclusively cloud-based in the next 3-5 years.

**ENTERPRISE DATA/APPLICATIONS MOVING TO THE CLOUD... ERP WILL NATURALLY FOLLOW**

Q12. To what extent are you using / planning to use Cloud Computing today and in the future (in the next 3-5 years)?

<table>
<thead>
<tr>
<th></th>
<th>NOW</th>
<th>IN THE NEXT 3-5 YEARS</th>
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<tbody>
<tr>
<td><strong>100% CLOUD</strong></td>
<td>NONE</td>
<td>6%</td>
</tr>
<tr>
<td><strong>76% - 99%</strong></td>
<td>8%</td>
<td>22%</td>
</tr>
<tr>
<td><strong>51% - 75%</strong></td>
<td>53%</td>
<td>49%</td>
</tr>
<tr>
<td><strong>25% - 50%</strong></td>
<td>27%</td>
<td>20%</td>
</tr>
<tr>
<td><strong>LESS THAN 25%</strong></td>
<td>12%</td>
<td>4%</td>
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</tbody>
</table>
Subsea 7, a world-leading engineering contractor to the offshore energy industry, chose cloud for all SAP applications and associated data. The company wanted to leverage greater efficiencies within their business and make cost savings from the current SAP-based ERP system. For them, a complete cloud environment delivers lower total cost of ownership, increased agility and flexibility, faster access to IT resources to manage workload changes and easy use of built-in regulatory compliance and security services.

Not all clouds are (or need to be) public. Many organisations will need private cloud deployments, either to retain greater control or due to regulatory/compliance directives. Indeed, 51% of UK CIOs in our survey said that they preferred private cloud. 35% preferred on-premises while 10% favoured hybrid solutions.

Industries will move at different speeds, and company size will matter. The vast majority of SaaS ERP adoptions to date have occurred in small to midsize companies and subsidiaries of larger enterprises, but enterprise SaaS ERP is beginning to gain traction. Larger enterprises ($5 billion + revenues) remain cautious about migrating from on-premises to SaaS ERP, but Forrester expects migration to accelerate as software vendors demonstrate more product maturity and are able to demonstrate examples of success at the scale the client needs.

A nuanced cloud strategy will be key. Just 4% of ERP systems are fully cloud-native today, according to the results of our UK CIO survey, while almost half run on-premise platforms and use application programming interfaces (APIs) to extend on to the cloud. The move to the cloud must accommodate these differences and be carefully engineered as part of a larger strategy around digital transformation, cost savings and new business models. Cloud ERP needs to be the cornerstone of that strategy, a gateway to building an agile, responsive enterprise that can pivot quickly.

**JUST 4% OF ERP SYSTEMS ARE FULLY CLOUD-NATIVE**

Q14. Which, if any, of the following statements best describes how your current ERP systems align with your Cloud and modernisation initiatives?

<table>
<thead>
<tr>
<th>Statement</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>No ERP cloud aspirations</td>
<td>4%</td>
</tr>
<tr>
<td>ERP on-premises but looking for managed hosting/IaaS</td>
<td>22%</td>
</tr>
<tr>
<td>ERP on-premises but use APIs to extend on the cloud</td>
<td>47%</td>
</tr>
<tr>
<td>ERP on-premises but exploring cloud native options (SaaS and PaaS)</td>
<td>14%</td>
</tr>
<tr>
<td>ERP hybrid (operates both on-premise and cloud, as per needs)</td>
<td>10%</td>
</tr>
</tbody>
</table>
MAKE YOUR CORE INTELLIGENT AND EXTENDED
INTELLIGENT ERP: AUGMENTED HUMAN CAPABILITIES

Today’s systems of record are fast being replaced by new systems of intelligence. These new systems of intelligence retain the core “systems of record” capabilities while layering in new automation and predictive intelligence capabilities. This transformation is occurring at the platform tier across the spectrum of core software applications, including marketing, automation, service and support, commerce, and sales, but the pace is most pronounced in the ERP application suite. This is an approach where intelligence, enabled by AI, machine learning, and analytics is not an ‘add-on’ but integral to the core part of the platform.

However, very few ERPs currently have a native intelligent core and only 4% of UK CIOs say that intelligent technology is a core part of their current ERP set-up. The appetite exists, however: 53% said that their current ERP system is inflexible and that they want to extend it, using intelligent technology. In the future, all ERPs will be intelligent at the core. Meanwhile, CIOs can begin today by infusing intelligent capabilities into their core systems.

ENTERPRISES BREAK SYSTEM INFLEXIBILITY BY EXTENDING ERP WITH INTELLIGENT TECH*

*Machine Learning, AI, Automation etc.

Q15. Which; if any, of the following statements best describes how your current ERP systems use intelligent technologies to improve productivity and empower employees in decision making?

Current ERP inflexible. Keep-as-is

• 10%

Current ERP inflexible. Want to extend with new intelligent tech

\[53%\]

Actively extending ERP with new intelligent tech

\[33%\]

Intelligent tech is a core part of current ERP

\[4%\]

But very few have a native intelligent core
Intelligent ERPs will manifest themselves in two key areas:

1. **Improving existing processes with intelligent automation.**
   For example, the SAP Cash Application software learns matching criteria from a company’s historical financial clearing data to automatically pair invoices with incoming payments.\(^6\)

2. **Enabling and executing new ideas not possible before.** The SAP Fiori apps for contract consumption predict contract expiration or goods consumption ahead of time, which enables more effective supplier negotiations and relationships. Customers can now forecast contract consumption, update using their own data, and retrain easily.\(^7\)

**EXTENDED ERP: THE POWER OF REAL-TIME**

ERP architectures are evolving to support real-time responses, which makes inherent sense. For example, if you are a manufacturer sourcing parts from all over the world, wouldn’t it be great to have a perfectly-coordinated, lean supply chain? It would mean that you could start manufacturing the moment you receive the order, without holding excess inventory, and avoid accepting orders that you could not meet in time.

To enable this at scale, modern ERPs can leverage both hybrid transactional/analytical processing and in-memory computing to enable embedded reporting and complex analytics, with response times as close to real time as possible. These can be nested into the application architecture, allowing users to perform tasks such as simulation, planning, modelling and forecasting without the need for standalone analytic applications. Over half of ERP systems discussed in our UK CIO survey included analytical architecture in some capacity - however more than two thirds did not leverage any smart architecture to boost performance or benefit from real-time reporting/analysis.

Smart architecture can enable a new wave of process innovation in ERP, transforming the way some ERP processes are executed, as real-time decision making becomes an integral part of the process rather than a separate activity performed after the fact.

**A national aerospace agency** aimed for the stars – it wanted to not only get rid of its ageing, custom-made, and expensive financial core system, but also to enable real-time responses by leveraging SAP S/4 HANA. The organisation used real-time as a vehicle to challenge their status-quo – to change their traditional operations and culture – using performance indicators that provided detailed scrutiny of performance. They used real-time actively to remedy problems as they occurred rather than at the end of the financial quarter - an approach that eliminated end-of-period bottlenecks, delivered continuous financial reporting visibility, and automated routine tasks, allowing the agency to enhance and maintain strict budget controls.

PARTNER WITH CLOUD CAPTAINS, NOT TRADITIONAL SERVICES FIRMS
As ERP systems adapt to the digital world, IT service providers will need to transition from their legacy operating models and work as part of an ecosystem. Successful system integrators (SIs) will actively co-create and partner with global cloud ecosystems, delivering valuable managed services to customers and managing clients’ business across multiple clouds.

**DIFFERENTIATE AND FUTURE-PROOF ME, ENTERPRISES TELL IT SERVICES PROVIDERS**

Q17. When working with an IT Services Provider, which of the following attributes do you consider to be most important? TOP 3

- Understands my business, creates competitive differentiation: 53%
- Creates sustainable & future-proof solutions: 48%
- Is technology agnostic, creates killer use cases: 41%
- Adapts service delivery model to reimagine traditional work: 41%
- Understands my industry & has credentials/examples: 37%
- Rapidly creates lift-and-shift for cost reduction, then navigates journey to the cloud: 35%
- Has a strong design and UX focus: 31%

Preferences for services providers that adapt service delivery model to reimagine traditional work:

- SAP: 60%
- NON-SAP: 29%

SAP users express a stronger preference for service providers with a flexible and reimagined service delivery model.

Key traditional IT services skills will still be needed: The talent to run and build solutions, to help customers with business transformations, and to simplify technology integration. But as the cloud providers increasingly automate technology management functions, some of these – such as workload and container management – may become utility services. Consequently, traditional IT services providers will need to differentiate by re-imagining their services-delivery models, being technology agnostic, and specialising in their clients’ business instead of merely maintaining and enhancing legacy.
Delivering ‘more/better for less’ via automation will also be a key part of the cloud captain’s role. Instead of resisting automation, successful services providers will need to look inwards, focusing on streamlining service delivery to clients by using automation within their own teams. This may be difficult initially; many outsourcing providers have traditionally grown revenue by increasing headcount at client-sites. In the cloud world however, bloated delivery teams are likely to be at a disadvantage – struggling to be agile or competitively-priced.

**Accenture** has been at the forefront of using agile methods to transform delivery to its clients. It has embraced automation and DevOps that will save nearly 10,000 engineering days per year and enable an 80% reduction in Jenkins maintenance for itself. The ultimate beneficiary? Accenture’s clients, who share a business-critical requirement: the need continuously and rapidly to roll out innovative software applications to increase competitiveness and advance business objectives.8

Before embarking on a new services project, customers should ask their services providers for credentials around automation in services delivery. Firms which have improved their solutioning to include automation, drastically changing the model on which they will operate compared to that of five years ago, should be prioritised. Internal use of smarter working methods, such as DevOps, and of analytics and data to drive outcomes should also be preferred.

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PERSONALISE
The reputation of legacy ERPs is of being reliable, but difficult to use – and this is not surprising. Enterprises have seldom invested in ERP user experience (UX), and many CIOs believe that intuitive, consumer-grade experiences are not mission-critical for back-office applications.

This perception is however being challenged actively. Employee expectations around UX have changed drastically, driven by the infusion of consumer web designs in enterprise software. Enterprises have also woken up to the intangible costs of ignoring UX such as disenfranchising employees, adding to the workload, creating process fatigue and encouraging ungoverned ‘shadow IT’.

**MORE THAN HALF CANNOT PERSONALISE ERP NATIVELY, SO MOST EXTEND AND BUILD ON TOP**

Q18. Which, if any, of the following statements best describes how your current ERP systems allow the personalisation of user experience and modern UX innovation?

- No personalisation/ modern UX possible: 14%
- No personalisation, so we extend with a UI overlay: 41%
- Supports some personalisation: 41%
- New UX, omni-channel, multi-device a core ERP feature: 4%

Forward-thinking enterprises today see UX as a key contributor to their customer experience. Using an ERP capable of natively delivering personalisation across channels enables true omni-channel and multi-device experiences for customers. Where legacy ERPs are not flexible enough to enable personalisation, enterprises are working with system integrators to extend their ERP systems to be more intuitive, through user interface overlays.

In the future, the ERP market will need to transition to assistive and conversational user experiences (including chatbots, automation and human-machine interaction). ERPs will be capable of processing, analysing, and acting on vast volumes of usage data in real time, using in-memory computing technologies. By learning about user-preferences, they will be able to adapt business processes iteratively - increasing user engagement and satisfaction.
A major European energy supplier realised how much the digital interaction between customers and their utilities was changing, particularly within the connected home space. A voice-enabled smart home service would allow customers to engage with the supplier without having to reach for their phone, or switch on their laptop. They took the bold step of rolling out an Amazon Echo/Alexa connected home solution culminating in a new customer self-serve channel which would help deflect call centre costs. Customers could now carry out a host of activities: submit meter readings, request account balances and next payment dates. Customers rated the service 4.2 out of 5 stars in the first few months – truly bringing the supplier’s digital strategy of “making energy easy” to life and setting a new standard for customer service and engagement in the utility industry.

Achieving this level of UX focus requires fundamental changes in the way companies think about and use ERP. All new applications must be created cloud- and mobile-native from inception, allowing multi-channel conversational interfaces and able to absorb external data.
AMPLIFY INSIGHTS BY CONVERGING DATA
Lastly, but perhaps most importantly, the ERP trend today is to transition from ‘data traps’ to being ‘data progressive’. Companies who appreciate the transformative power of data intelligence realise that the ability to converge different data sources is essential in order to produce well-rounded insights.

However, a major challenge to the achievement of a unified data view is that large parts of enterprise data is either “dark” (unstructured, not readily usable), disparate (hard to combine) or of poor quality / incomplete. Disparate legacy ERP systems, arcane business processes driving data management, and the lack of data governance all create data traps. Our survey results show that 92% of current ERP systems represent a bottleneck for CIOs, often requiring manual/programmatic intervention to enable data sharing.

Q19. Which, if any, of the following statements best describes how your current ERP systems share data with other enterprise applications and leverage data from them? (Source: Accenture 2019 UK CIO Survey)

- ERP extremely insular, traps valuable data 8%
- Manual extract & transform needed to reuse ERP data 51%
- Custom APIs needed to extract & transform ERP data 33%
- ERP allows bi-directional data transfer securely 8%

Trapped data, if freed and converged with other data sources to become a single combined source of higher quality data, can deliver a competitive advantage. Companies that are able to harness this data and to use it in conjunction with new data sources - weather and devices data or from the Internet of Things (IoT) - will be better able to hold retain and serve customers, and to react faster, guiding their business through improved insights to be more competitive, and to develop new business models.

**Loblaw Companies Limited**, Canada’s food and pharmacy leader and the nation’s largest retailer, is using an SAP ERP solution to improve operational efficiencies to unlock business data. The solution enables the company better to utilise the entirety of the data available out of the ERP. The end results? Excessive inventories are no longer a problem and the company is better informed about which products to promote, with an improved view of requirements for each individual store.

9. Accenture Case Study: Loblaw Companies Limited: Unlocking value with Accenture and SAP
CONCLUSION:
MAKE ERP THE PIVOT
OF YOUR EXPONENTIAL EVOLUTION

Accenture’s five ERP trends point to a new normal, where ERP is the driver for agile and responsive organisations, not just at the edges but at the core.

Imagine what you could achieve if your core systems were agile enough to imbibe the benefits of technological waves. If your ERP systems were not just record-keepers, but the ingredients for business intelligence - leading to swift new product launches, improved services and processes, and the execution of new strategies, at scale, and at speed. In this new normal, what could your business achieve?
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