RETHINK, REINVENT, REALIZE.

How to successfully scale digital innovation to drive growth

AUTOMOTIVE – OES
OUR PREMISE AND RESEARCH QUESTION

When it comes to digital transformation, scaling innovation pilots is critical.

Yet many clients tell us that they are struggling with this very step – and feel that they might get stuck with “piecemeal projects” that don’t deliver significant value.

Can we find key best practices that could help them overcome their challenges, and drive real change, for real new growth?
n=1,350 responses from companies with 1bn+ in revenue

60% C-suite respondents

13 industries and 17 countries

Source: Accenture 2019 Industry X.0 Survey
OUR KEY FINDINGS

Companies are scaling more than 60 percent of all digital PoCs, but less than two out of ten companies are doing it successfully.

What’s the difference? The leading 15 percent manage their scaling efforts differently.

Following the four best practices of these “Champions” is a recipe to succeed at innovating for digital transformation.

THE RESULT: IT’S ALL A MATTER OF MANAGEMENT!

A SURPRISE! (we didn’t expect to find that many companies trying to scale!)

THE REASON TO READ! (these best practices are what readers will come for)

Source: Accenture 2019 Industry X.0 Survey
Q: WHAT’S THE CURRENT STATUS IN SCALING DIGITAL INNOVATION?

A: THINGS ARE SPEEDING UP – IN SURPRISING WAYS.
Design is an obvious innovation priority as they focus deeply on product quality and features. Production & Operations is a close second due to the emphasis on streamlined manufacturing operations and rapid turnaround.

**INNOVATION PRIORITY**

*“innovation priority” = percentage of respondents who are prioritizing digital innovation in these business areas*
AUTOMOTIVE – OES COMPANIES ARE SCALING DIGITAL POCs ACROSS BUSINESS FUNCTIONS

Automotive – OES manufacturers are almost evenly scaling digital POCs across key business areas

SCALING INTENSITY*

Product & Service Design 62,0% 59,8%
Production & Operations 58,8% 58,4%
Supply Chain & Logistics 63,0% 59,2%
Sales & Aftersales Service 59,5% 58,7%
Digital/Physical Security 63,8% 59,0%
Continuous Customer Engagement 61,1% 60,8%

* “scaling intensity” = ratio of avg. number of proof of concepts scaled to avg. number initiated in each business function, across discrete and process industries.

Source: Accenture 2019 Industry X.0 Survey
AUTOMOTIVE – OES COMPANIES RECOGNIZE THE NEED FOR INNOVATING AT SCALE TO:

- Operate at speed with an **innovative and robust supply chain**, and
- Continuously **deliver reliable and connected products to the customers**.
Top 10 outcomes targeted by Automotive – OES companies through scaling of digital PoCs

- Automated systems anomaly detection: 36%
- Digitized purchase order management: 36%
- Higher growth in service revenues: 36%
- Lower number of prototype iterations: 36%
- Improved data privacy: 34%
- Higher customer satisfaction score: 33%
- Improved supply chain efficiencies: 33%
- Reduction in process complexity: 33%
- Reduced conversion costs (direct labor costs + manufacturing overheads): 32%
- Greater plant flexibility: 32%

Source: Accenture 2019 Industry X.0 Survey
...AND THEY ARE CHOOSING BIG DATA ANALYTICS, AR/VR & CLOUD TO DRIVE THESE OUTCOMES

Top 3 technologies leveraged to facilitate scaling, by function

<table>
<thead>
<tr>
<th>PRODUCT &amp; SERVICE DESIGN</th>
<th>PRODUCTION &amp; OPERATIONS</th>
<th>SUPPLY CHAIN &amp; LOGISTICS</th>
<th>SALES &amp; AFTERSALES SERVICE</th>
<th>DIGITAL/PHYSICAL SECURITY</th>
<th>CONTINUOUS CUSTOMER ENGAGEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>AI/Al-powered Automation</td>
<td>RANK 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>AI Assistants</td>
<td></td>
<td>RANK 3</td>
<td></td>
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<td></td>
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<tr>
<td>3D printing</td>
<td></td>
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<td></td>
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<tr>
<td>Mobility</td>
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<tr>
<td>IIOT Sensors &amp; Transmitters</td>
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<tr>
<td>Immersive Experience</td>
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<tr>
<td>Industrial Robotics</td>
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<tr>
<td>Big Data Analytics</td>
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<tr>
<td>Digital Twin</td>
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<tr>
<td>Cloud</td>
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<tr>
<td>Blockchain</td>
<td></td>
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<tr>
<td>Autonomous Vehicles</td>
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<td></td>
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<tr>
<td>Machine Learning/Deep Learning</td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Quantum Computing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cyber Security Protocols</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Source: Accenture 2019 Industry X.0 Survey
Q: WHAT ABOUT SCALING SUCCESS – DOES EVERYONE SEE IT?

A: NO. SOME COMPANIES RACE AHEAD, OTHERS STRUGGLE.
SO, WHO’S SCALING THE BEST?

The Automotive – OES industry has a lower percentage of Champions compared to the global average

AUTOMOTIVE - OES

CHAMPIONS
Earn RODI higher than industry ROIC and industry RODI; scale more than 50% of their digital Proof-of-Concepts

CONTENDERS
Earn RODI lower than industry ROIC and lower than industry RODI; scale more than 50% of their PoCs

CADETS
Earn RODI lower than industry ROIC and lower than industry RODI; scale less than 50% of their PoCs

CROSS-INDUSTRY

*Percentage of champions in each geography = 100 x (The number of champions in a particular geography)/(Total number of companies surveyed in that particular geography)

**Percentage of champions in each industry = 100 x (The number of champions in a particular industry)/(Total number of companies surveyed in that particular industry)

Source: Accenture 2019 Industry X.0 Survey
**Auto-OES Champions set themselves higher “RODI” targets and achieve them too.**

Automotive – OES Champions achieved over 4 times the RODI clocked by Contenders; proving that it’s not how much you scale, but how you scale that matters.

**Returns on Digital Investment (RODI)**

RODI = Returns on Investment (Net Gain/Total Investment) from scaled digital PoCs across all the key business functions.

We asked executives about the average RODI they expected before scaling digital PoCs, and the RODI they finally achieved.

### Automotive - OES

- **Champions**
  - RODI expected: 25.5%
  - RODI achieved: 27.1%

- **Contenders**
  - RODI expected: 7.4%
  - RODI achieved: 6.5%

- **Cadets**
  - RODI expected: 6.1%
  - RODI achieved: 4.7%

### Cross-Industry

- **Champions**
  - RODI expected: 22.2%
  - RODI achieved: 25.4%

- **Contenders**
  - RODI expected: 7.1%
  - RODI achieved: 6.4%

- **Cadets**
  - RODI expected: 11.4%
  - RODI achieved: 9.7%

Source: Accenture 2019 Industry X.0 Survey
LIKE CHAMPIONS, CONTENDERS AND CADETS TOO FACE ALIGNMENT AND TALENT DEFICITS. WHILE CHAMPIONS OVERCOME THESE, OTHERS CONTINUE TO GRAPPLE WITH THEM.
SECURING FUNDING FOR DIGITAL REINVENTION FROM THE BOARD IS A MAJOR ROADBLOCK FOR AUTO – OES COMPANIES

EXTENT TO WHICH SECURING FUNDING FROM THE BOARD FOR DIGITAL REINVENTION IS A CHALLENGE

<table>
<thead>
<tr>
<th>Extent of Challenge</th>
<th>Automotive – OES</th>
<th>Cross-Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>To a great extent</td>
<td>19%</td>
<td>24%</td>
</tr>
<tr>
<td>To a large extent</td>
<td>37%</td>
<td>35%</td>
</tr>
<tr>
<td>To a moderate extent</td>
<td>33%</td>
<td>24%</td>
</tr>
<tr>
<td>To a limited extent</td>
<td>8%</td>
<td>12%</td>
</tr>
<tr>
<td>Not at all</td>
<td>3%</td>
<td>5%</td>
</tr>
</tbody>
</table>

KEY REASONS WHY BOARDS OF AUTOMOTIVE – OES COMPANIES REFUSE TO FUND DIGITAL REINVENTION

1. Failure to scale digital PoCs in the past
2. Shortage of and difficult access to digital skills; Lack of a clear digital roadmap; Foreseen immaturity of technology
3. Shortage of budget for capital investments
4. Inadequate ROI from digital investments
5. Poor understanding of digital reinvention within Top Management
6. Lack of a digital-native mindset among Board members

Source: Accenture 2019 Industry X.0 Survey

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### Alignment Challenges and Skill Deficits Are of Primary Concern

**Automotive – OES executives’ top picks** for “biggest challenges to scaling digital PoCs”

<table>
<thead>
<tr>
<th>CHAMPIONS (CH), CONTENDERS (CT), CADETS (CA)</th>
<th>PRODUCT &amp; SERVICE DESIGN</th>
<th>PRODUCTION &amp; OPERATIONS</th>
<th>SUPPLY CHAIN &amp; LOGISTICS</th>
<th>SALES, AFTER SALES SERVICE</th>
<th>DIGITAL / PHYSICAL SECURITY</th>
<th>CONTINUOUS CUSTOMER ENGAGEMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inability to align top and middle management to innovate customer value</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
</tr>
<tr>
<td>Inability to align talent pools and IT assets across key business functions</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
</tr>
<tr>
<td>Inability to align top management view on ‘digital value’</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
</tr>
<tr>
<td>Lack of adequate skills to translate digital proofs of concept into scaled-up action plans</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
</tr>
<tr>
<td>Inadequate infrastructure to innovate relevant digital value with speed</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
</tr>
<tr>
<td>Absence of culture to stimulate technology driven cross-functional innovations</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
</tr>
</tbody>
</table>

*Other options which weren’t picked and often included: “Inability to align in-house innovation systems/architecture with agile digital ecosystems,” “Lack of skills to innovate with digital technologies and platforms,” “Lack of skills to identify and articulate business case for digital,” “Absence of culture to design, develop and deliver digital business models,” “Absence of culture to stimulate cross-functional innovation with digital,” “Absence of culture to drive on-time innovation of monetizable customer experiences,” “Lack of partnerships to bridge digital gaps across processes,” “Inadequate metrics to systematically track digital investments.”

Source: Accenture 2019 Industry X.0 Survey
WHAT DO COMPANIES STAND TO LOSE IF THEY FAIL TO ADDRESS THESE CHALLENGES?

Around 80% of Automotive – OES leaders fear significant escalations in cost (>5%) alongside losing talent (>5%), if they fail to overcome organizational challenges

<table>
<thead>
<tr>
<th>Challenge</th>
<th>AUTOMOTIVE – OES</th>
<th>CROSS-INDUSTRY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loss in Market Cap</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Impact</td>
<td>4%</td>
<td>8%</td>
</tr>
<tr>
<td>1-5%</td>
<td>24%</td>
<td>23%</td>
</tr>
<tr>
<td>6-10%</td>
<td>23%</td>
<td>27%</td>
</tr>
<tr>
<td>Above 20%</td>
<td>28%</td>
<td>24%</td>
</tr>
<tr>
<td>11-15%</td>
<td>17%</td>
<td>13%</td>
</tr>
<tr>
<td>16-20%</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Fall in Market Share</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Impact</td>
<td>6%</td>
<td>8%</td>
</tr>
<tr>
<td>1-5%</td>
<td>25%</td>
<td>21%</td>
</tr>
<tr>
<td>6-10%</td>
<td>21%</td>
<td>28%</td>
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<tr>
<td>Above 20%</td>
<td>29%</td>
<td>23%</td>
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<tr>
<td>11-15%</td>
<td>16%</td>
<td>15%</td>
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<tr>
<td>16-20%</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Reduction in Revenues</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Impact</td>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>1-5%</td>
<td>21%</td>
<td>21%</td>
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<tr>
<td>6-10%</td>
<td>24%</td>
<td>27%</td>
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<tr>
<td>Above 20%</td>
<td>32%</td>
<td>21%</td>
</tr>
<tr>
<td>11-15%</td>
<td>12%</td>
<td>19%</td>
</tr>
<tr>
<td>Increase in Attrition Rates</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Impact</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>1-5%</td>
<td>11%</td>
<td>19%</td>
</tr>
<tr>
<td>6-10%</td>
<td>30%</td>
<td>28%</td>
</tr>
<tr>
<td>Above 20%</td>
<td>27%</td>
<td>26%</td>
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<tr>
<td>11-15%</td>
<td>24%</td>
<td>14%</td>
</tr>
<tr>
<td>16-20%</td>
<td>4%</td>
<td>5%</td>
</tr>
<tr>
<td>Cost Escalations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Impact</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>1-5%</td>
<td>19%</td>
<td>19%</td>
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<tr>
<td>6-10%</td>
<td>21%</td>
<td>28%</td>
</tr>
<tr>
<td>Above 20%</td>
<td>31%</td>
<td>27%</td>
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<tr>
<td>11-15%</td>
<td>19%</td>
<td>15%</td>
</tr>
<tr>
<td>16-20%</td>
<td>6%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: Accenture 2019 Industry X.0 Survey
Automotive – OES companies have the opportunity to achieve sizeable increase in RODI, if they focus on overcoming skill and alignment deficits.

**INCREMENTAL RODI POTENTIAL IF DEFICIT IS OVERCOME**

<table>
<thead>
<tr>
<th>Deficit</th>
<th>Automotive - OES</th>
<th>Cross-Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alignment Deficit</td>
<td>12,1%</td>
<td>8,4%</td>
</tr>
<tr>
<td>Infrastructure Deficit</td>
<td>8,4%</td>
<td>8,4%</td>
</tr>
<tr>
<td>Skills Deficit</td>
<td>12,1%</td>
<td>6,5%</td>
</tr>
<tr>
<td>Partnership Deficit</td>
<td>6,0%</td>
<td>6,0%</td>
</tr>
<tr>
<td>Measurement Deficit</td>
<td>4,1%</td>
<td>4,1%</td>
</tr>
<tr>
<td>Cultural Deficit</td>
<td>3,7%</td>
<td>3,7%</td>
</tr>
</tbody>
</table>

Source: Accenture 2019 Industry X.0 Survey
Q: HOW DO CHAMPIONS OVERCOME THESE CHALLENGES AND SCALE THEIR DIGITAL INNOVATIONS?

A: WITH 4 SPECIFIC BEST PRACTICES.
1. DEFINING THE VALUE THAT GUIDES INNOVATION EFFORTS

Champions assess the opportunities before them, and narrow in on the market opportunities they want to pursue. They then use that clarity to communicate with middle management and direct their innovation efforts to secure expected returns.

2. FOCUS ON INTERNAL CHANGE AND EXTERNAL VALUE

Champions prefer a measured approach to blend organizational change with digital transformation initiatives, creating what we call an ambidextrous organization. With a clear view of the customer value, managers and employees are less likely to feel blindsided by a digital learning curve that is too steep.
Champions recognize the enormity of integrating rapidly advancing technologies, along with talent and assets, back into their organization. In line with their ambidextrous approach, they take the vital step to re-rig the core of their organizations, seeding and growing new digital innovations organically within organizational boundaries.

Most manufacturers use the same enablers to drive innovation, such as software applications to support operations, or analytics platforms to generate better insights. However, Champions alone are masters at matching the support to the function that needs it most and will use it best.
Q: IS THERE A ROADMAP TO MATURE AS AN ORGANIZATION TOWARDS SUCCESSFULLY SCALING DIGITAL INNOVATION?

A: YES THERE IS...
... WE HAVE BUILT ONE LEVERAGING FIVE KEY ORGANIZATIONAL LEVERS

LEADERSHIP & CULTURE
ECOSYSTEM PARTNERSHIPS
SKILLSETS
TECHNOLOGY
PLATFORM
Maturity curve of organizational levers in the Automotive – OES sector

Reorganized to Reinvent

Champions

Contenders

Cadets

Traditional Organization

Platform

Application Lifecycle Management

Product Lifecycle Management

Product Data Management

Simulation Data Management

Autonomous Vehicles

Social Media

Cloud

Digital Sales & Marketing

Digital Production Management

Tech Partners

Digital Experimenters

Easy-wins' collaborations

Ecosystem Partnerships

Product Data Management

Big Data Analytics

Immersive Experience

UX Design

Digital Platform Management

Digital Platform

Social Media

Platform

Digital Program Management

Data Analysis/Visualization

UX Design

Digital Platform Management

Digital Program Management

Competitors

Academia

Strategic acquisitions to scale wisely

Digitally rotating to the new

Collaborations to scale more

Leadership & Culture

Leadership & Culture

Leadership & Culture

Strong belief in digital

Digitally transforming core business

Digitally transforming and growing the core

Digital vision and value and execution roadmap

Source: Accenture 2019 Industry X.0 Survey

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**TOP 10 SKILL SETS FOR AUTOMOTIVE – OES CHAMPIONS**

**Digital Production Management** along with **Digital Program Management** are critical skills to scale digital PoCs.

<table>
<thead>
<tr>
<th>Skill Set</th>
<th>Champions</th>
<th>Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digital Production Management</td>
<td>39%</td>
<td></td>
</tr>
<tr>
<td>Digital Program Management</td>
<td>36%</td>
<td></td>
</tr>
<tr>
<td>Data Analysis/ Visualization</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>Digital Platform Management</td>
<td>34%</td>
<td></td>
</tr>
<tr>
<td>Network Architecture</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>Automation Expertise</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>Digital Systems Engineering</td>
<td>32%</td>
<td></td>
</tr>
<tr>
<td>Agile/SCRUM Expertise</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>Engineering</td>
<td>27%</td>
<td></td>
</tr>
<tr>
<td>AI/ML Training</td>
<td>27%</td>
<td></td>
</tr>
</tbody>
</table>

% of Automotive - OES respondents saying “Very Important”

Source: Accenture 2019 Industry X.0 Survey
TOP 5 PARTNERSHIPS FOR AUTOMOTIVE – OES CHAMPIONS

Competitors and suppliers are critical partnerships to scale digital PoCs

<table>
<thead>
<tr>
<th>Partnership</th>
<th>% of Automotive - OES respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competitors</td>
<td>32%</td>
</tr>
<tr>
<td>Suppliers</td>
<td>31%</td>
</tr>
<tr>
<td>Channel Partners</td>
<td>31%</td>
</tr>
<tr>
<td>Academia</td>
<td>31%</td>
</tr>
<tr>
<td>Tech Partners</td>
<td>31%</td>
</tr>
</tbody>
</table>

Source: Accenture 2019 Industry X.0 Survey
Q: WHAT CAPABILITIES DO AUTOMOTIVE – OES COMPANIES NEED TO BUILD AS THEY NAVIGATE ALONG THIS ROADMAP?

A: CHAMPIONS PRIORITIZE CERTAIN CAPABILITIES, AND INVEST HEAVILY IN THEM.
CHAMPIONS WANTS TO INVEST IN STRATEGIC DIGITAL ALIGNMENT, DIGITAL ROLES AND MAN-MACHINE COLLABORATION

This corresponds with their choice of Competitors and suppliers as partners

**TOP 5 CAPABILITIES**

<table>
<thead>
<tr>
<th>Capability</th>
<th>Champions</th>
<th>Contenders</th>
<th>Cadets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategic Digital Alignment:</td>
<td>100%</td>
<td>82%</td>
<td>56%</td>
</tr>
<tr>
<td>Man-Machine Collaboration</td>
<td>100%</td>
<td>86%</td>
<td>78%</td>
</tr>
<tr>
<td>Digital Roles</td>
<td>94%</td>
<td>86%</td>
<td>78%</td>
</tr>
<tr>
<td>Reskilling for Digital</td>
<td>94%</td>
<td>83%</td>
<td>78%</td>
</tr>
<tr>
<td>Open and Co-Innovation</td>
<td>94%</td>
<td>89%</td>
<td>78%</td>
</tr>
</tbody>
</table>

% of respondents who will invest in these capabilities

Source: Accenture 2019 Industry X.0 Survey
Striving to scale your own innovations?

Get in touch!

Whether you are seeking to start new initiatives the right way, help with scaling those you already have—we are ready to help you improve your outcomes by putting our knowledge to work! Please reach out to raghav.narsalay@accenture.com or aarohi.sen@accenture.com at Accenture Research, or visit accenture.com/scaling-innovation

References:

David Abood, Aidan Quilligan, Raghav Narsalay, and Aarohi Sen (2019), Rethink, Reinvent, Realize, downloadable from here.
KEY CONTACTS

Axel Schmidt
Senior Managing Director and Industry Managing Director, Mobility
axel.schmidt@accenture.com

Jean Cabanes
Managing Director, global Industrial Equipment lead,
jean.cabanes@accenture.com

Raghav Narsalay
Managing Director, global Research lead, Industry X.O
raghav.narsalay@accenture.com

Aarohi Sen
Principal, Thought Leadership, Industry X.O
aarohi.sen@accenture.com
SURVEY DEMOGRAPHICS – OVERALL (n=1350)

INDUSTRY
- Consumer Goods & Services
- Industrial Equipment
- Utilities
- High Tech
- Chemicals (incl. Petrochemicals)
- Life Sciences (Pharmaceuticals/Bio-tech)
- Automotive – Auto-ancillary/Auto-parts
- Medical Technologies
- Oil & Gas
- Automotive – OEM
- Metals & Mining (Metals/Mining)
- Aerospace & Defense
- Other Natural Resources

EXEC PROFILE
- C-Suite
- Senior VP/EVP

ANNUAL REVENUE
- US$1 - 10 Billion
- US$11 - 30 Billion
- US$31 - 50 Billion
- Over US$50 Billion

GEO-SPREAD
- China, 26%
- United States, 29%
- Japan, 6%
- United Kingdom, 6%
- Germany, 5%
- Australia, 5%
- France, 4%
- India, 4%
- Brazil, 4%
- Switzerland, 3%
- Canada, 2%
- Spain, 2%
- The Netherlands, 2%
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Accenture research shapes trends and creates data driven insights about the most pressing issues global organizations face. Combining the power of innovative research techniques with a deep understanding of our clients’ industries, our team of 300 researchers and analysts spans 20 countries and publishes hundreds of reports, articles and points of view every year. Our thought-provoking research—supported by proprietary data and partnerships with leading organizations, such as MIT and Harvard—guides our innovations and allows us to transform theories and fresh ideas into real-world solutions for our clients.

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