RETTHINK, REINVENT, REALIZE.

How to successfully scale digital innovation to drive growth

METALS & MINING
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?
<table>
<thead>
<tr>
<th>Survey Type</th>
<th>n</th>
<th>Companies with 1bn+ in revenue</th>
<th>C-suite Respondents</th>
<th>Industries</th>
<th>Countries</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>GLOBAL SURVEY AT-A-GLANCE</strong></td>
<td>1,350</td>
<td>60%</td>
<td>13 industries</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td><strong>METALS &amp; MINING AT-A-GLANCE</strong></td>
<td>72</td>
<td>65%</td>
<td>13 industries</td>
<td>13</td>
<td></td>
</tr>
</tbody>
</table>

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

Companies are scaling more than 60 percent of all digital POCs, but only about one out of ten companies are doing it successfully.

What’s the difference? The leading 13 percent manage their scaling efforts differently.

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

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)

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

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.
WORKPLACE SECURITY AND PRODUCT/SERVICE DESIGN ARE TOP INNOVATION PRIORITIES FOR METALS & MINING

Digital/ Physical Security is an obvious priority for Metals & Mining companies. Design is a close second as companies focus on improving the quality and properties of the end product.

INNOVATION PRIORITY*

* "innovation priority” = percentage of respondents who are prioritizing digital innovation in these business areas

Source: Accenture 2019 Industry X.0 Survey
METALS & MINING COMPANIES ARE SCALING DIGITAL POCs ACROSS BUSINESS FUNCTIONS

Investments in digital platforms for improved data integration with trading partners, is indicative of the high scaling intensity towards customer engagement.

SCALING INTENSITY*

* “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

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METALS AND MINING COMPANIES RECOGNIZE THE NEED FOR INNOVATING AT SCALE TO:

- Continuously engage with their customers, and
- Improve product or service lifecycle management.
**Top 10 outcomes targeted by Metals & Mining companies through scaling of digital POCs**

<table>
<thead>
<tr>
<th>Outcome</th>
<th>% of respondents who achieved this outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greater plant flexibility</td>
<td>44%</td>
</tr>
<tr>
<td>Greater supply chain flexibility</td>
<td>43%</td>
</tr>
<tr>
<td>Greater modularity in product/service design</td>
<td>43%</td>
</tr>
<tr>
<td>Pervasive ecosystem-level security</td>
<td>42%</td>
</tr>
<tr>
<td>Management of entitlements across product lifecycle</td>
<td>42%</td>
</tr>
<tr>
<td>Reduction in inventory and scrap</td>
<td>42%</td>
</tr>
<tr>
<td>Physical site security</td>
<td>40%</td>
</tr>
<tr>
<td>Predictive maintenance/servicing of assets</td>
<td>39%</td>
</tr>
<tr>
<td>Lower energy utilization</td>
<td>39%</td>
</tr>
<tr>
<td>Improved labor productivity</td>
<td>39%</td>
</tr>
</tbody>
</table>

Source: Accenture 2019 Industry X.0 Survey
...AND THEY ARE CHOOSING BIG DATA ANALYTICS, MACHINE LEARNING & 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 3</td>
<td></td>
<td>RANK 2</td>
<td></td>
<td>RANK 3</td>
</tr>
<tr>
<td>AI Assistants</td>
<td>RANK 1</td>
<td></td>
<td>RANK 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3D printing</td>
<td>RANK 1</td>
<td></td>
<td>RANK 2</td>
<td></td>
<td>RANK 3</td>
</tr>
<tr>
<td>Mobility</td>
<td>RANK 2</td>
<td></td>
<td>RANK 3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>IIOT Sensors &amp; Transmitters</td>
<td>RANK 1</td>
<td></td>
<td>RANK 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Immersive Experience</td>
<td>RANK 2</td>
<td></td>
<td>RANK 3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Industrial Robotics</td>
<td>RANK 3</td>
<td></td>
<td>RANK 1</td>
<td></td>
<td>RANK 1</td>
</tr>
<tr>
<td>Big Data Analytics</td>
<td>RANK 2</td>
<td></td>
<td>RANK 3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digital Twin</td>
<td>RANK 3</td>
<td>RANK 1</td>
<td>RANK 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cloud</td>
<td>RANK 3</td>
<td>RANK 1</td>
<td>RANK 2</td>
<td></td>
<td>RANK 2</td>
</tr>
<tr>
<td>Blockchain</td>
<td>RANK 3</td>
<td>RANK 1</td>
<td>RANK 2</td>
<td></td>
<td>RANK 3</td>
</tr>
<tr>
<td>Autonomous Vehicles</td>
<td>RANK 3</td>
<td>RANK 1</td>
<td>RANK 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Machine Learning/Deep Learning</td>
<td>RANK 3</td>
<td>RANK 1</td>
<td>RANK 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quantum Computing</td>
<td>RANK 3</td>
<td>RANK 1</td>
<td>RANK 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cyber Security Protocols</td>
<td>RANK 3</td>
<td>RANK 1</td>
<td>RANK 2</td>
<td></td>
<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 Metals & Mining industry has fewer percentage of Champions compared to the global average.

**METALS & MINING**
- **11%** Champions
- **13%** Contenders
- **76%** Cadets

**CROSS-INDUSTRY**
- **13%** Champions
- **22%** Contenders
- **65%** Cadets

**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.

*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
Metals & Mining 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.

**METALS & MINING**

- **CHAMPIONS**
  - 28.3% RODI expected
  - 31.3% RODI achieved

- **CONTENDERS**
  - 7.0% RODI expected
  - 7.9% RODI achieved

- **CADETS**
  - 15.4% RODI expected
  - 18.5% RODI achieved

**CROSS-INDUSTRY**

- **CHAMPIONS**
  - 22.2% RODI expected
  - 25.4% RODI achieved

- **CONTENDERS**
  - 7.1% RODI expected
  - 6.4% RODI achieved

- **CADETS**
  - 11.4% RODI expected
  - 9.7% RODI achieved

Source: Accenture 2019 Industry X.0 Survey
LIKE CHAMPIONS, CONTENDERS AND CADETS TOO FACE ALIGNMENT AND INFRASTRUCTURE DEFICITS. WHILE CHAMPIONS OVERCOME THESE, OTHERS CONTINUE TO GRAPPLE WITH THEM.
SECURING FUNDING FOR DIGITAL REINVENTION PROJECTS FROM THE BOARD IS STILL NOT EASY

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

<table>
<thead>
<tr>
<th>Extent</th>
<th>Metals &amp; Mining</th>
<th>Cross-Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>To a great extent</td>
<td>21%</td>
<td>24%</td>
</tr>
<tr>
<td>To a large extent</td>
<td>33%</td>
<td>35%</td>
</tr>
<tr>
<td>To a moderate extent</td>
<td>29%</td>
<td>24%</td>
</tr>
<tr>
<td>To a limited extent</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>Not at all</td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>

KEY REASONS WHY BOARDS OF METALS & MINING COMPANIES REFUSE TO FUND DIGITAL REINVENTION

1. Inadequate ROI from digital investments
2. Failure to scale digital proofs of concept (POCs) in the past; Shortage of and difficulty in accessing digital skills; Budget shortage for capital investments
3. Poor understanding of digital reinvention within Top Management; Lack of a clear digital roadmap
4. Lack of a digital-native mindset among Board members
5. Foreseen immaturity of technology

Source: Accenture 2019 Industry X.0 Survey
### Metals & Mining 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 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>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>Inadequate infrastructure to integrate services and products to drive experiences in the ‘new’</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
</tr>
<tr>
<td>Lack of partnerships to build a high-quality unified view of the customer and their needs</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
<td>CH</td>
<td>CT</td>
<td>CA</td>
</tr>
<tr>
<td>Insufficient processes/metrics to assess ROI on digital technology investments</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 to 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”
WHAT DO COMPANIES STAND TO LOSE IF THEY FAIL TO ADDRESS THESE CHALLENGES?

Over 70% of Metals & Mining leaders fear significant escalations in cost (>5%) alongside losing market share (>5%), if they fail to overcome organizational challenges.

### METALS & MINING

<table>
<thead>
<tr>
<th>Loss in Market Cap</th>
<th>8%</th>
<th>29%</th>
<th>17%</th>
<th>25%</th>
<th>11%</th>
<th>10%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall in Market Share</td>
<td>6%</td>
<td>15%</td>
<td>33%</td>
<td>19%</td>
<td>22%</td>
<td>4%</td>
</tr>
<tr>
<td>Reduction in Revenues</td>
<td>6%</td>
<td>18%</td>
<td>32%</td>
<td>22%</td>
<td>15%</td>
<td>7%</td>
</tr>
</tbody>
</table>

### CROSS-INDUSTRY

<table>
<thead>
<tr>
<th>No Impact</th>
<th>1-5%</th>
<th>6-10%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loss in Market Cap</td>
<td>8%</td>
<td>23%</td>
</tr>
<tr>
<td>Fall in Market Share</td>
<td>8%</td>
<td>21%</td>
</tr>
<tr>
<td>Reduction in Revenues</td>
<td>8%</td>
<td>21%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>No Impact</th>
<th>1-5%</th>
<th>6-10%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increase in Attrition Rates</td>
<td>8%</td>
<td>19%</td>
</tr>
<tr>
<td>Cost Escalations</td>
<td>5%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Source: Accenture 2019 Industry X.0 Survey
Metals & Mining companies have the opportunity to achieve sizeable increase in RODI, if they focus on cultural and partnership deficits.

**INCREMENTAL RODI POTENTIAL IF DEFICIT IS OVERCOME**

<table>
<thead>
<tr>
<th>Deficit</th>
<th>Metals &amp; Mining</th>
<th>Cross-Industry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alignment Deficit</td>
<td>8.4%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Infrastructure Deficit</td>
<td>9.8%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Skills Deficit</td>
<td>6.5%</td>
<td>6.5%</td>
</tr>
<tr>
<td>Partnership Deficit</td>
<td>10.2%</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>12.4%</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 Metals & Mining sector

- **Platform**
  - Application Lifecycle Management
  - Social Media

- **Technology**
  - Product Data Management
  - Immersive Experience
  - Additive Manufacturing
  - AI/ML Training
  - Cloud
  - Big Data Analytics
  - Digital Systems Engineering

- **Skill Sets**
  - Digital Production Management
  - Quality Analysis
  - Digital Systems Engineering

- **Ecosystem Partnerships**
  - Developer Community
  - Suppliers
  - Competitors
  - Research Clusters

- **Leadership & Culture**
  - Strategic acquisitions to scale wisely
  - Digitally transforming and growing the core
  - Digital vision and value and execution roadmap

- **Contenders**
  - Product Lifecycle Management
  - Enterprise Resource Planning
  - Simulation Data Management

- **Cadets**
  - Channel partners
  - Tech partners

- **Traditional Organization**
  - Digital experimenters

Source: Accenture 2019 Industry X.0 Survey

Collaborations to scale more

'Straightforward to reinvent'

'Simple-to-scale'

Strong belief in digital core transforming

Collaborations to scale more

Reorganized to Reinvent

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TOP 10 SKILL SETS FOR METALS & MINING CHAMPIONS

Automation expertise along with Quality Analysis are critical skills to build and scale digital POCs

<table>
<thead>
<tr>
<th>Skill Set</th>
<th>Champions</th>
<th>Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automation Expertise</td>
<td>48%</td>
<td></td>
</tr>
<tr>
<td>Quality Analysis</td>
<td>44%</td>
<td></td>
</tr>
<tr>
<td>Digital Sales &amp; Marketing</td>
<td>43%</td>
<td></td>
</tr>
<tr>
<td>UX Design</td>
<td>43%</td>
<td></td>
</tr>
<tr>
<td>Agile/SCRUM Expertise</td>
<td>39%</td>
<td></td>
</tr>
<tr>
<td>Digital Program Management</td>
<td>39%</td>
<td></td>
</tr>
<tr>
<td>Digital Systems Engineering</td>
<td>39%</td>
<td></td>
</tr>
<tr>
<td>Network Architecture</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>Customer experience analysis</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>AI/ML Training</td>
<td>33%</td>
<td></td>
</tr>
</tbody>
</table>

% of Metals & Mining respondents saying “Very Important”

Source: Accenture 2019 Industry X.0 Survey
Research Clusters and Competitors are critical partnerships to build and scale digital POCs

Source: Accenture 2019 Industry X.0 Survey
Q: **WHAT CAPABILITIES DO METALS & MINING COMPANIES NEED TO BUILD AS THEY NAVIGATE ALONG THIS ROADMAP?**

A: **CHAMPIONS PRIORITIZE CERTAIN CAPABILITIES, AND INVEST HEAVILY IN THEM**
EVERY CHAMPION WANTS TO INVEST IN ECOSYSTEM ORCHESTRATION

No wonder Research Clusters and Competitors are key partnerships for them

<table>
<thead>
<tr>
<th>TOP 5 CAPABILITIES</th>
<th>Champions</th>
<th>Contenders</th>
<th>Cadets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ecosystem Orchestration</td>
<td>100%</td>
<td>25%</td>
<td>78%</td>
</tr>
<tr>
<td>Reskilling for Digital</td>
<td>100%</td>
<td>73%</td>
<td>88%</td>
</tr>
<tr>
<td>Integrating Hardware and Software</td>
<td>100%</td>
<td>73%</td>
<td>88%</td>
</tr>
<tr>
<td>Hyper-Personalization</td>
<td>100%</td>
<td>50%</td>
<td>69%</td>
</tr>
<tr>
<td>Mainstreaming Digital</td>
<td>100%</td>
<td>78%</td>
<td>89%</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 arohi.sen@accenture.com at Accenture Research, or visit accenture.com/scaling-innovation

References:

David Abood, Aidan Quilligan, Raghav Narsalay, and Arohi Sen (2019), Rethink, Reinvent, Realize, downloadable from here.
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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 60%
- Senior VP/EVP 22%
- Other 18%

**ANNUAL REVENUE**
- US$1 - 10 Billion 79%
- US$11 - 30 Billion 12%
- US$31 - 50 Billion 5%
- Over US$50 Billion 5%

**GEO-SPREAD**
- United States, 29%
- China, 26%
- Japan, 6%
- Germany, 5%
- France, 4%
- Brazil, 4%
- Italy, 3%
- Other Natural Resources

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SURVEY DEMOGRAPHICS – METALS & MINING (N=72)

EXEC PROFILE
- 65% C-Suite
- 25% Senior VP/EVP
- 10% VP/Director

ANNUAL REVENUE
- 81% US$1 - 10 Billion
- 8% US$11 - 30 Billion
- 8% US$31 - 50 Billion
- 3% Over US$50 Billion

GEO-SPREAD
- China, 39%
- United States, 22%
- Australia, 28%
- United Kingdom, 04%
- Brazil, 03%
- Canada, 03%
- India, 01%
About Accenture Research

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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