



Value **untangled**

Amplify speed to value
through interoperability

Growth Markets (Asia-Pacific, Middle East,
Africa and Latin America) perspective

From insights to action, the path to extraordinary value starts here.

accenture

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High growth economies can be **technology-chaotic**



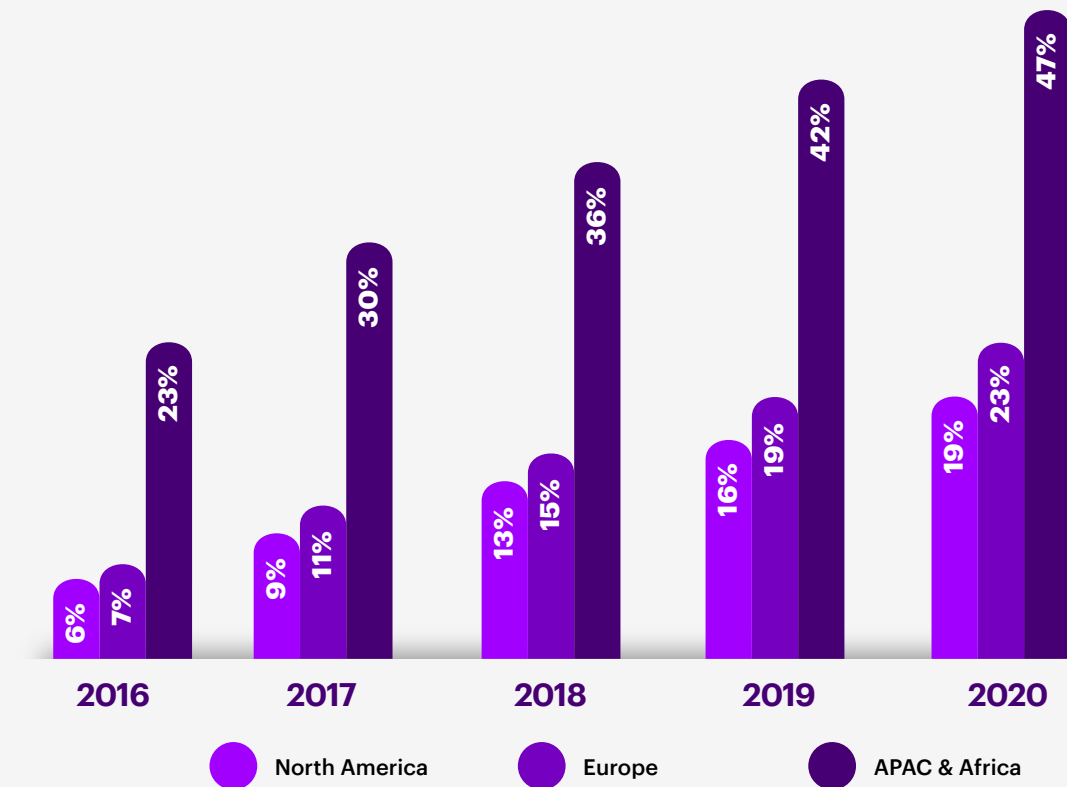
High growth economies like Asia-Pacific, Middle East, Africa and Latin America (Growth Markets) are faster to adopt new technologies compared to other regions. This kind of rapid growth typically leads to (or comes from) diverse investments in technology - centered around new ways of working and setting new performance frontiers.

Software adoption has been higher in the Asia-Pacific region as compared to North America and Europe due to prominent in-country software stacks, like, Japan has had its own versions ranging from ERP, supply chain, HR systems to cloud for a long time. As a result, companies in Asia-Pacific inherit country-specific software environments as they expand across the region. This is unlike North America and Europe where companies usually work with global enterprise software providers. The Asia-Pacific region has also leapfrogged ahead of North America and Europe in the adoption of digital native technologies such as digital payments, social commerce (social media-based e-commerce), digital banking and ride sharing services. For example, in 2020 digital payment adoption rates in Asia-Pacific stood at close to 50%, compared to less than 25% in North America and Europe (Figure 1).¹

Figure 1 Digital payments adoption is highest in Asia-Pacific

Digital payments are used widely in Asia-Pacific despite low internet adoption.

Digital Payment Adoption (2016 - 2020)



Source: World Bank, The Global Findex Database 2021, June 2022

Note: The numbers represent percentage of respondents using mobile phone or internet to make payments at least once a month.



However, a digital payments boom has also led to an increase in fragmentation characterized by varying messaging standards, settlement times and operating hours. Payment preferences of users in the Asia-Pacific region vary greatly by country as each country in the region has its own regulations unlike large single markets in US, UK or Germany. As a result, there are multiple different payment solutions, ride hailing apps, messaging apps etc. in the region. For example, dominant e-wallets have a market share of around 90% in China, while credit cards are the popular choice in Singapore and Australia. The lack of interoperability across platforms in these markets curtail cross-border ecommerce opportunities.





Our research across 15 countries and 19 industries also highlighted that multi-application environments are more prevalent in companies in Growth Markets than in other regions.

On average, 72% of enterprises in these markets reported using more than 500 enterprise applications across their organization – that’s 10% higher than the global average of 62% (Figure 2). It is common practice for enterprises in the region to work with diverse partners in significantly large transformation projects.

Figure 2 Growth Markets report using highest number of enterprise applications

Multi-application environments are a reality in Growth Markets when compared to other regions.

Enterprises using more than 500 applications

Global



Growth Markets



Note: The numbers represent percentage of respondents who selected more than 500 applications as a response. Growth Markets includes Asia-Pacific, Middle East, and Latin America regions.



A recent report from Accenture, Total Enterprise Reinvention, also highlighted the increased focus of the Growth Markets region on emerging technologies when compared to North America and Europe (Figure 3).

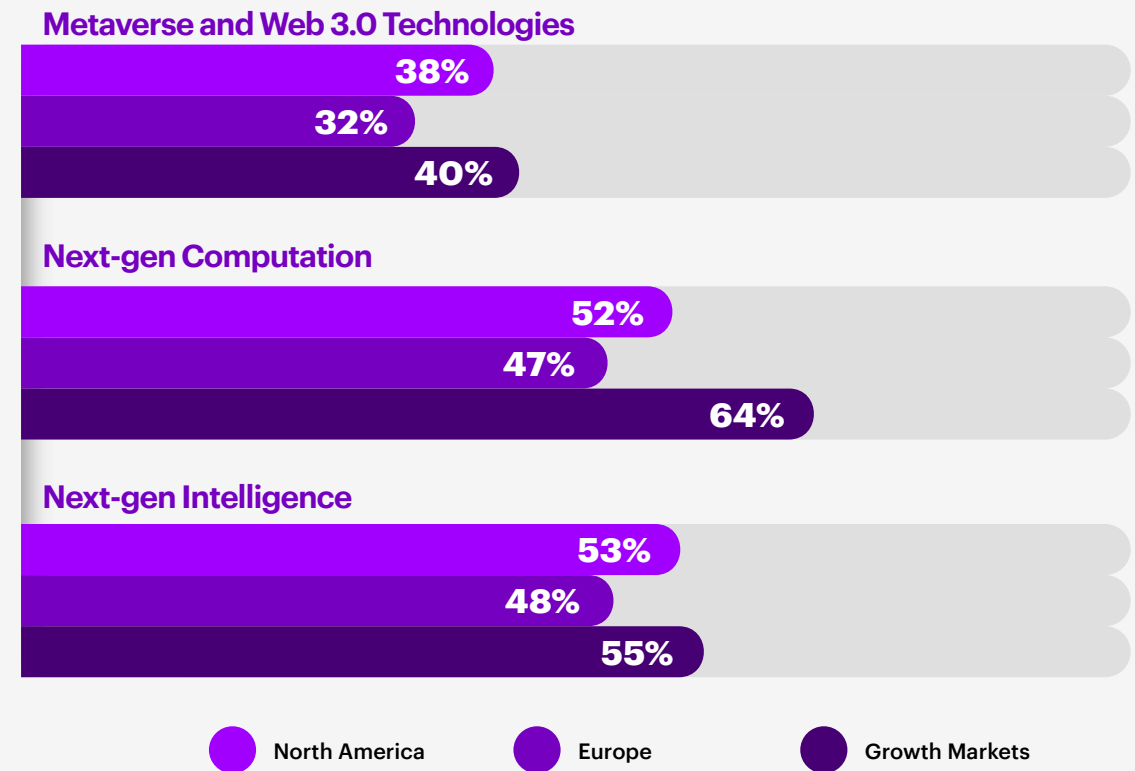
Diversity in providers is great – but as these deployments mature, companies need to ensure that their technology stack does not create silos and trap value.

Interoperability becomes a key value differentiator in this environment to maximize value. When companies spend substantially on their applications and platforms, they need to have a well thought out strategy for interoperability to connect diverse systems with business goals. At its core, interoperability connects technology, people and processes. It does so by creating a common language across critical applications and systems, enabling a deeper understanding of data without the cost and effort of building a data lake. When data silos are removed, functional silos can begin to collaborate. This inherent synergy reduces duplicative efforts, reveals hidden bottlenecks and builds better human connections.

Figure 3 Emerging technologies on the radar

Companies in Growth Markets are ahead of their global peers when it comes to evaluating the emerging technologies and their future implementation in their organization.

Emerging technologies on the radar



N= 1,501 (NA), 1,260 (Europe), 1,292 (Growth Markets)

Source: Accenture Total Enterprise Reinvention Survey data



Embracing agility in Growth Markets during uncertain times

Enterprises in Growth Markets have been navigating a difficult and an uncertain economic environment not unlike their global counterparts. In these unpredictable times, they need to quickly adapt to new circumstances, adopt new technologies and remain nimble in order to thrive. With the integration of various enterprise applications and technologies, people and processes, they can untangle value from chaos and accelerate growth.

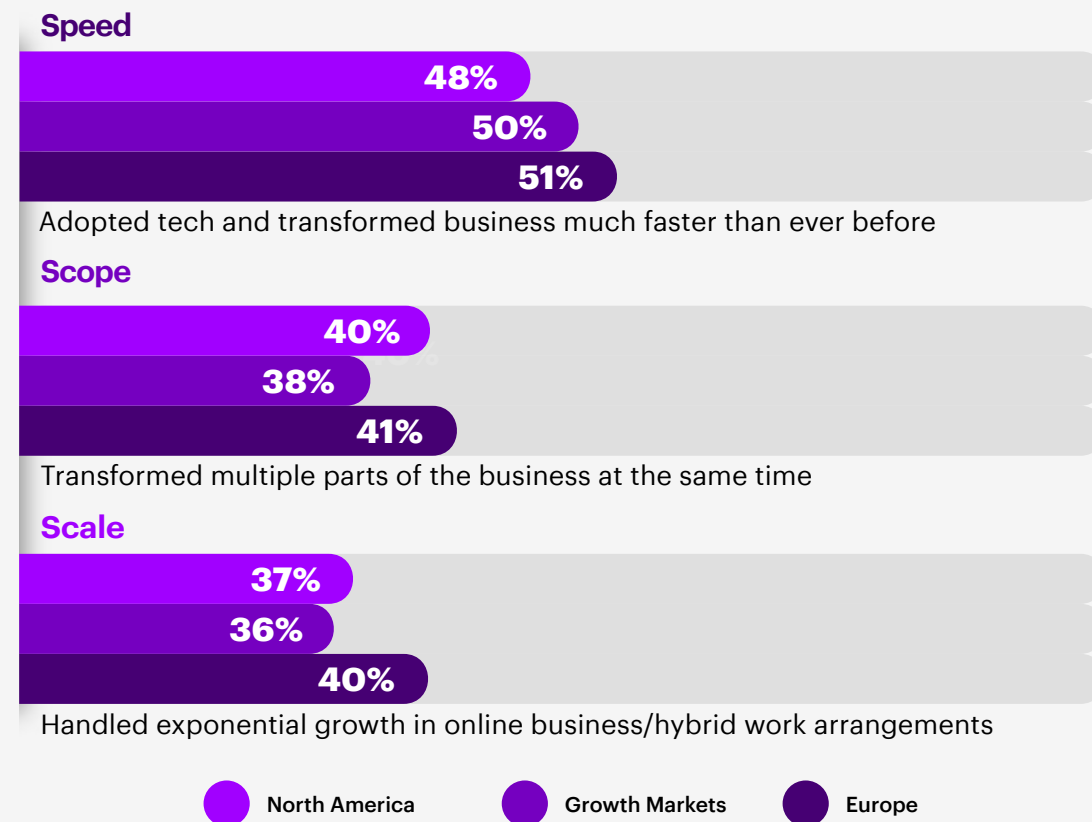
When we surveyed ~1,300 C-suite respondents from mid-to-large companies in Growth Markets, we found that in the last two years alone, one in two have had to transform multiple parts of their business at the same time or execute a single large transformation much faster than ever before. We call this compressed transformation (Figure 4).

The question is:
How did they do it?

Figure 4 Uncertainty and compressed transformation

In the last two years, one in two companies in Growth Markets have had to transform multiple parts of their business at the same time or execute a single large transformation much faster than ever before.

During the COVID-19 crisis, i.e., last 2 years in Growth Markets, my organization has (agree + strongly agree)



N= 1,501 (NA), 1,260 (Europe), 1,292 (Growth Markets)

Note: The percentages represent aggregate of respondents selecting "Agree" and "Strongly Agree". Growth Markets includes Asia-Pacific, Middle East, and Latin America regions.



Interoperability: the great unifier

Interoperability defined

Interoperability is when enterprise applications can easily interact with each other and exchange data. A seamless user experience across applications creates a single source of data truth that aligns everyone to common goals, leading to better decision making, human connections and insight generation.

We found that companies with this kind of agility have one thing in common: high interoperability, or the ability to make enterprise applications work in conjunction with each other. Why? Because interoperability integrates critical business applications, turning tangled inputs into a single source of data truth. This leaves organizations better equipped to pivot quickly and take advantage of new opportunities.

And with that agility comes growth. We found that companies with high interoperability in Growth Markets grew revenue 2.5X faster than their peers with low interoperability (Figure 5) and are set to unlock an additional three percentage points in annual revenue growth. It comes as no surprise, then, that winning companies keep interoperability top of mind for the entire C-suite—not just the CTO or CIO.

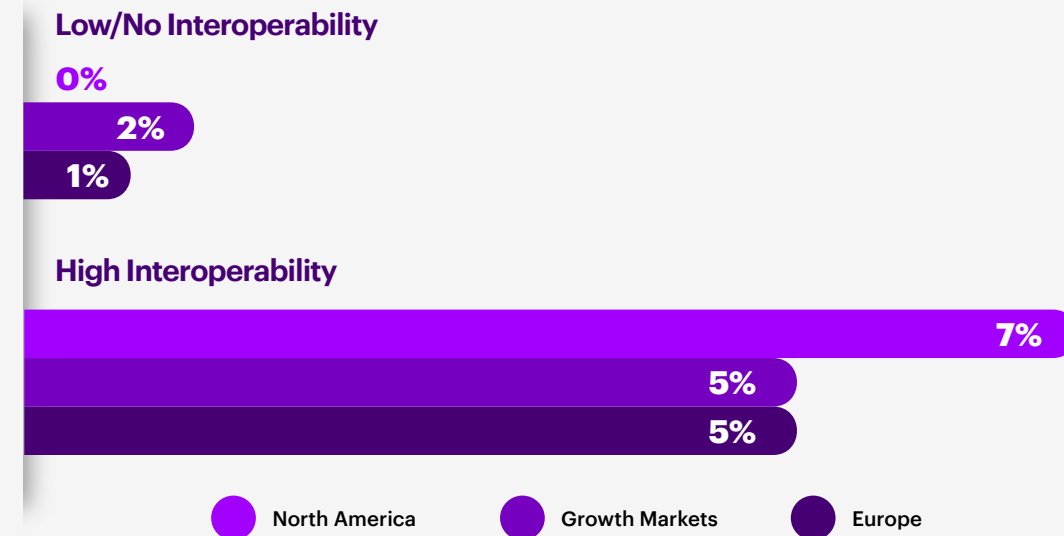


CXOs need to understand that integrated enterprise applications can enable businesses to move from siloed technology and fragmented data to connected solutions, agility and resiliency. Integration unlocks true business transformation, creating additional value in meeting customer demands, developing new revenue streams, and competing in the market. But it also requires new methods of thinking and working.

Figure 5 Growth Markets lag behind peers in unlocking value from interoperability

Highly interoperable companies in Growth Markets unlocked up to three additional percentage points of revenue growth than low/no interoperability companies stuck in the technology status quo.

Average revenue growth last FY (in %)



Source: Accenture Research based on Survey data.

Note: Additional growth rates due to increased platform exploration and seamless interoperability are estimates based on an econometric model such as Revenue Growth $i = A \times \text{medium interoperability} + B \times \text{high interoperability} + C \text{ controls} + \text{error}$, in which the baseline is the low/no interoperability group. Estimates include a variety of firm-specific controls including industry, country, size, technology spending and an interaction term between industry and country. A variety of robustness checks have been performed (i.e., scaling revenue growth by industry averages, by previous growth rates and the results holds. Survey sample = 4,053 firms in 19 industries and 23 countries. Growth Markets includes Asia-Pacific, Middle East, Africa and Latin America regions. Revenue growth percentages have been rounded off to the nearest whole number.

Last FY implies the latest annual company financials reported before February 2022.



Interoperability is now in reach

The concept of interoperability isn't new, but the ability to manifest it is. This is due to three technology changes that make it easier for organizations to configure and reconfigure applications as needed without overhauling their digital core:

1. Ubiquity of cloud:

Many organizations have already moved to the cloud, giving them a common data layer that provides a single source of truth.

2. Improved application design:

Modern applications are designed to share data. They have simplified interfaces and support additional capabilities.

3. Low-cost applications:

The large number of specialized applications on the market has reduced the cost.

Our research finds that approximately one-third of companies (30.5%) in Growth Markets are capitalizing on these technological advances to untangle the value trapped within their organization. These companies are racing past their competitors because they make high interoperability central to their overall business and technology strategy.





Liberty Holdings unlocks significant value from enterprise interoperability

Liberty Holdings², a South Africa-based financial services and insurance group, was facing challenges due to the fact its claims, customer and underwriting data was stored in multiple, monolithic back-end systems. The result was a suboptimal insurance claims process that required employees to manually extract data from seven different systems, then enter it into a spreadsheet. They had to then log into several other systems in order to process a claim. The operation was slow, subject to human error and ultimately did not provide the level of support that Liberty's customers expect.

Using an API-led approach, Liberty's developers were able to unlock data from back-end systems to build a digital platform with a single comprehensive view of customers. This solution features a digital claims portal that allows Liberty staff to quickly access critical customer and underwriting information, ultimately enabling them to process claims much faster. With new processes in place, the insurance company was also able to expand its claims service beyond traditional call centers to new digital channels, reaching customers online and via mobile devices. Its customer service team could also finalize in-progress claims through other channels. For example, if a customer starts a claim online and then needs assistance, a claims assistant can jump in and help without having to restart the whole process.





By automating the claims process and eliminating manual data entry and extraction, Liberty reduced claim processing time by up to 20 minutes per claim. Moreover, an impressive API reuse rate of 40% has increased the software delivery speed of Liberty's development team. For example, during the COVID-19 pandemic, Liberty was able to roll out services to customers via WhatsApp within weeks, instead of months, by reusing existing architecture and focusing resources on front-end development.





Interoperability's **long-term cost**



Our research shows that globally as well as in Growth Markets, leading companies can achieve high interoperability with just 2-4% higher IT and functional budgets directed at applications, while handling as many (if not more) diverse applications within their IT stack. Interoperability allows all kinds of businesses to outperform their peers.





HSBC revamps employee experience to enhance CX

When HSBC³ needed to improve employee experiences and deliver enhanced services, they found that legacy HR processes had grown complex and fragmented across different countries. The bank's transformation program required more agile and interoperable systems. As a result, HSBC decided to use digital HR solutions from SAP, ServiceNow and MuleSoft to achieve its objective.

Legacy HR performance and compensation systems, manual processes for talent and succession management and payroll were replaced with SAP SuccessFactors, an integrated, cloud-based HR software application. ServiceNow added an employee engagement layer, including a portal, knowledge management and case management. HSBC also needed to integrate these multitude of global and regional applications, data and devices to ensure seamless HR workflows.

The transformation exercise helped HSBC streamline HR processes, making services more

accessible for employees. It also empowered both HR and IT to focus on services and innovation rather than expensive and complex maintenance and upgrades to existing legacy systems. The bank was able to improve core services like payroll, workforce administration, employee data management and communications. At the same time, improved access to data and insights will help leaders to leverage the bank's talent and make better decisions about their teams and people.





Building on this foundation, the bank has developed a market-leading skills infrastructure including a learning experience platform using Degreed and a talent marketplace using Gloat. These capabilities help employees access new learning and opportunities to gain experiences across the bank, while helping the bank develop the capabilities it needs to improve client experience and transform the bank for the future including in areas like wealth, sustainable finance and digital.



Barriers to **interoperability**



Today's business and technology landscape can make reaching high interoperability a challenge precisely because it can become a tangle very quickly. While 72% of enterprises in Growth Markets use more than 500 applications today, this number is only going to increase as eight out of 10 enterprises in the region say they plan to buy more from multiple vendors in the next two years. At the same time, 69% say that the number of applications and their associated technical complexities are a barrier to reaching interoperability. The longer organizations in Growth Markets wait to make themselves interoperable, the more difficult it becomes to retrofit interoperability on an ever-growing application stack.

What's driving this difficult situation?

First, enterprises have more choice today due to the large number of cloud-based applications available. As an example, in the last decade, global marketing activity has moved online and onto social media—and the number of enterprise technology providers that cater to marketing has grown by

53x⁴





Financial tools are always provided by many vendors. We want to work with the best for key, bigger ERP applications and different applications have different pros and cons. So, you can't actually just rely on one vendor to do everything.

The CIO of a Southeast Asian health services company

The second key factor is that more voices are involved in technology decision making. IDC, an industry analyst firm, believes that as many as 20 IT and line-of-business employees may be involved in technology decision-making processes today.⁵

But having more choices and more voices can be a great thing. It allows organizations to choose tech with the right features for specific processes and differentiate across functions where it matters. For example, fraud detection applications in Banking need to be much more sophisticated than those in Food Retail. And in Healthcare, applications need the strongest data and privacy measures given the sensitive data they handle. Similarly, Consumer Goods companies need applications to enable near real-time social media monitoring so that they can launch new products and adjust current ones as trends quickly change or emerge.

Our research also highlighted that 62% of respondents in Growth Markets are held back from improving interoperability because they struggle to align their application strategy with overall business goals. Another 59% cite lack of buy-in from senior leadership; 45% lack a clear ROI or business case; and 33% believe interoperability is simply too expensive.

Companies with high interoperability also face these challenges. But what sets them apart is their ability to cope with obstacles by finding alignment across the business, acting early and making difficult decisions as needed. They build and reinforce technology integration with meaningful collaboration—intrinsic to employees' work life. And, most importantly, they back up their diverse application stacks with the right business strategy. One that is conscious of the organization's full universe of applications and vendor selection style and recognizes the limitations of the IT team.



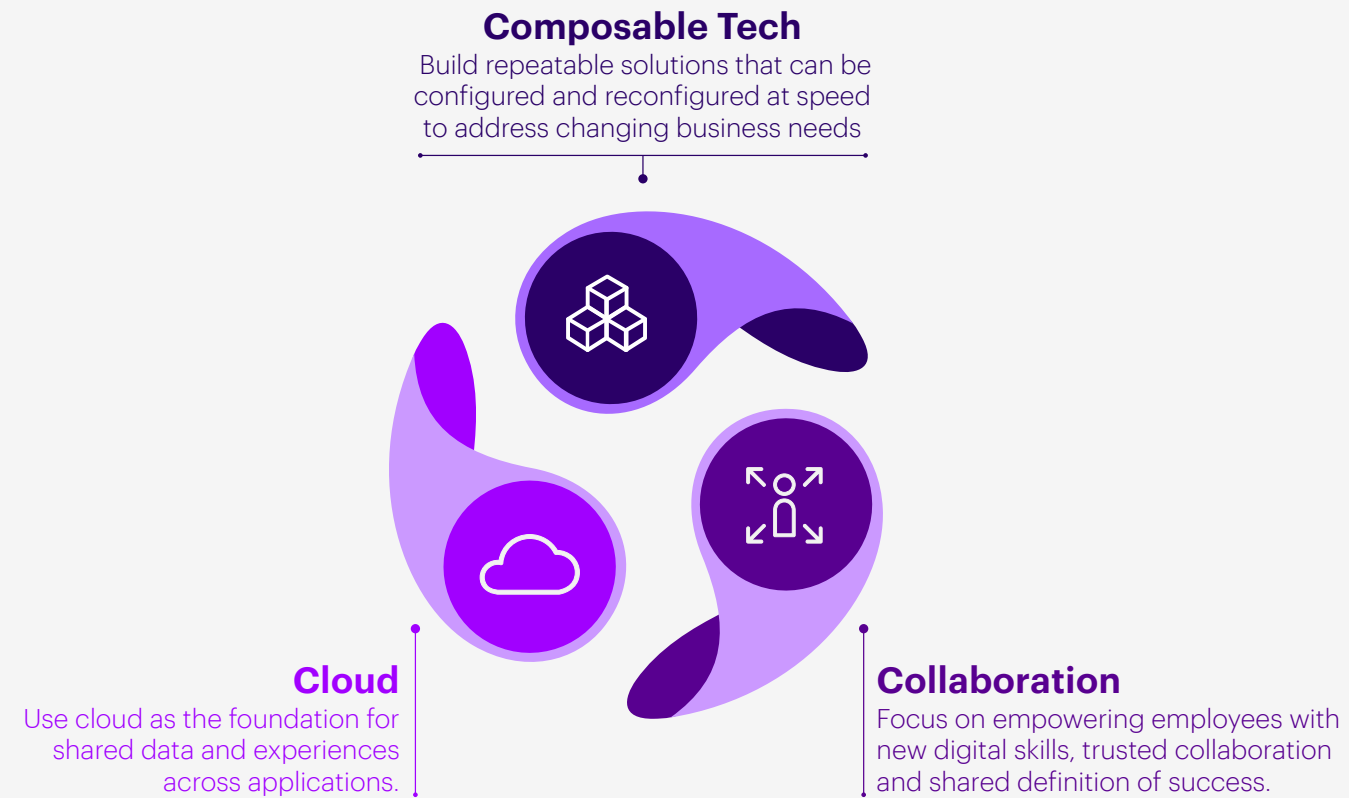
How to improve interoperability **and thrive in uncertainty**

Our research uncovered the best practices and common pitfalls C-suite respondents faced on their way to high interoperability, as well as what enabled them to compress their transformation.

Here's what we learned.

Figure 6 How to improve your interoperability

To improve interoperability and compress transformation, companies must leverage the cloud, utilize composable tech and focus on meaningful collaboration.





1. Leverage the cloud

Cloud is a fundamental interoperability enabler—and it's now ubiquitous. Organizations can use it to hyperscale computing in their core operations and at the edges. With this ability, organizations can pull and query data across the entire enterprise.

Companies that successfully improve their interoperability start by moving existing applications to the cloud and investing in new, cloud-based enterprise applications (SaaS). But more importantly, **they use the cloud to connect data and experiences across applications, creating one version of truth.** Our research found that nearly 70% of companies in Growth Markets with high/medium interoperability adopted public cloud and have already migrated more than 30% of their data and workloads. Only 57% of low/no interoperability companies have adopted public cloud, a 13% lag.

Companies with high interoperability also use the cloud to change the way they work. They aim to standardize and simplify the processes modern cloud applications manage—enabling real-time insights and creating strategic agility. Interoperability like this breaks down organizational silos and creates a common thread so that change initiatives can flow to different parts of the organization in parallel, and at speed.

Consider Australia-based metals & mining company, Coronado Global Resources.⁶ The company moved its legacy ERP, HCM and supply chain management to Oracle cloud. Initially envisioned as a “lift and shift” of Oracle E-Business Suite (EBS), it transformed into a comprehensive program encompassing

Procurement, Projects, and Integration Cloud. This move helped Coronado introduce a new supplier portal and streamline operations by removing the delay for the purchasing team to update supplier information. In addition to getting more functionality from their cloud investment, Coronado is reducing costs and improving efficiencies each year.

The high interoperability group's confidence in the cloud reinforces findings from our 2021 thought leadership piece, the [Cloud Continuum](#): organizations that use cloud beyond migration and infrastructure to reinvent themselves enjoy better cost savings, speed to market, talent retention and sustainability.



2. Utilize composable tech

Composable tech builds flexibility into the heart of organizations so they can cope with the effects of disruption through faster, better and cheaper transformation. It requires shifting from a technology architecture of static, standalone parts to one of composable pieces.

In practice, this involves using prebuilt, interoperable solutions to swap and plug-and-play smaller application components, creating new applications without wider disruption. These solutions are often curated for specific industries and functions and act as a form of future proofing—giving organizations the dexterity to quickly adopt the technologies of tomorrow.

However, the greatest benefit of composable tech may be seamless data analysis and sharing. With data flowing between connected applications, companies can easily share information with the

entire organization so everyone is on the same page, creating a common purpose and driving better decisions.

As multi-application and multi-provider deployments are prevalent in Growth Markets, composable tech can help enterprises easily integrate a large number of applications, people, processes and data to create a seamless digital experience for their customers, as well as their employees. In fact, composable tech is the natural next step from component-based architecture prevalent in the region. Due to vast diversity across the region, enterprises in Growth Markets regularly design architectures in such a manner that the core system of record is common across multiple countries while last mile systems such as logistics, payroll and payments are local to each country.

Composable tech defined

Composable tech is an approach that uses proven, repeatable solutions that can be configured and reconfigured at speed to address changing business needs. This compresses transformation, setting the stage for rapid value realization.



3. Focus on meaningful collaboration

Any transformation that doesn't include people is bound to fail—interoperable applications are only one part of the equation. Companies need to also focus on building meaningful collaboration. This is enabled by interoperability and happens when functions and people work together seamlessly towards a common goal.

They can use real-time data, analytics and AI, together with new ways of working, to unlock the value of technology, empower people and achieve better outcomes.





Companies with high interoperability have an unwavering focus on improving human connections with trust and skills. They continuously invest in pervasive training, empowering IT and non-IT decision makers to make sound application choices. They also build data-sharing mindsets to prevent data hoarding.

Companies with high interoperability are open to sharing data inside and outside the organization. Decentralized data—where everyone is on the same page—helps companies find harmony. The result is happier, more productive employees who can easily use company data to produce meaningful results, prepare presentations, comply with regulations or simply collaborate. Decentralized data also frees up almost two hours of an employees' workday in productivity alone. **For a company that has 10,000 employees, this amounts to a productivity gain of almost 15,000 hours and \$100 million every year.⁷**



A collaborative culture comes from the top: our research found that more than one fourth (27%) of executives in Growth Markets consider a lack of collaboration across business functions as a top challenge caused by low/no interoperability. Leadership can amplify collaboration by drawing up broad use cases for new interoperable applications and challenging employees across functions to solve them as a team—an internal hackathon of sorts.

Accenture⁸ uses Microsoft Teams to accelerate the art of collaboration. Using Teams as-a-platform brings tools, content and processes together in a single location to enable a new way of working. Accenture has been able to bring data, insights and services together as part of its digital worker program that involves foundational technology, productivity and collaboration.

Accenture has also enabled the introduction of new capabilities, automation and business processes – all without leaving Teams. It also introduced extra services, such as using bots to answer people’s queries more quickly. One example, CALM (CAL + Machine), is a custom app embedded in Teams that delivers in-context insights, such as financial filings or Twitter news, to Client Account Leads (CALs).



Interoperability: **Value untangled**



Companies in Growth Markets need to be able to anticipate and respond to uncertainty—supply shocks, economic disruptions, competitive threats or new growth opportunities—as it happens, not when the opportunity has passed.

By compressing their transformation from years to months (or even days) and transforming multiple parts of the business simultaneously, companies can overcome obstacles and embrace opportunities. This only happens when everything is integrated and interoperable, from the diverse technologies that power the business to the employees on the ground. More so in Growth Markets, as enterprises in the region use a higher number of applications across their organizations as compared to other regions.

But building and improving interoperability in a diverse application landscape is easier said than done. Luckily, there are ways to position your company for success: leverage the cloud, utilize composable tech, and finally, focus on meaningful collaboration with decentralized data and capabilities.

About one-third of companies in Growth Markets are able to develop this level of agility to untangle the value trapped in their organization, racing past their competitors in growth, efficiency and resiliency. Their secret? Using interoperability as the catalyst for total enterprise reinvention.



Methodology

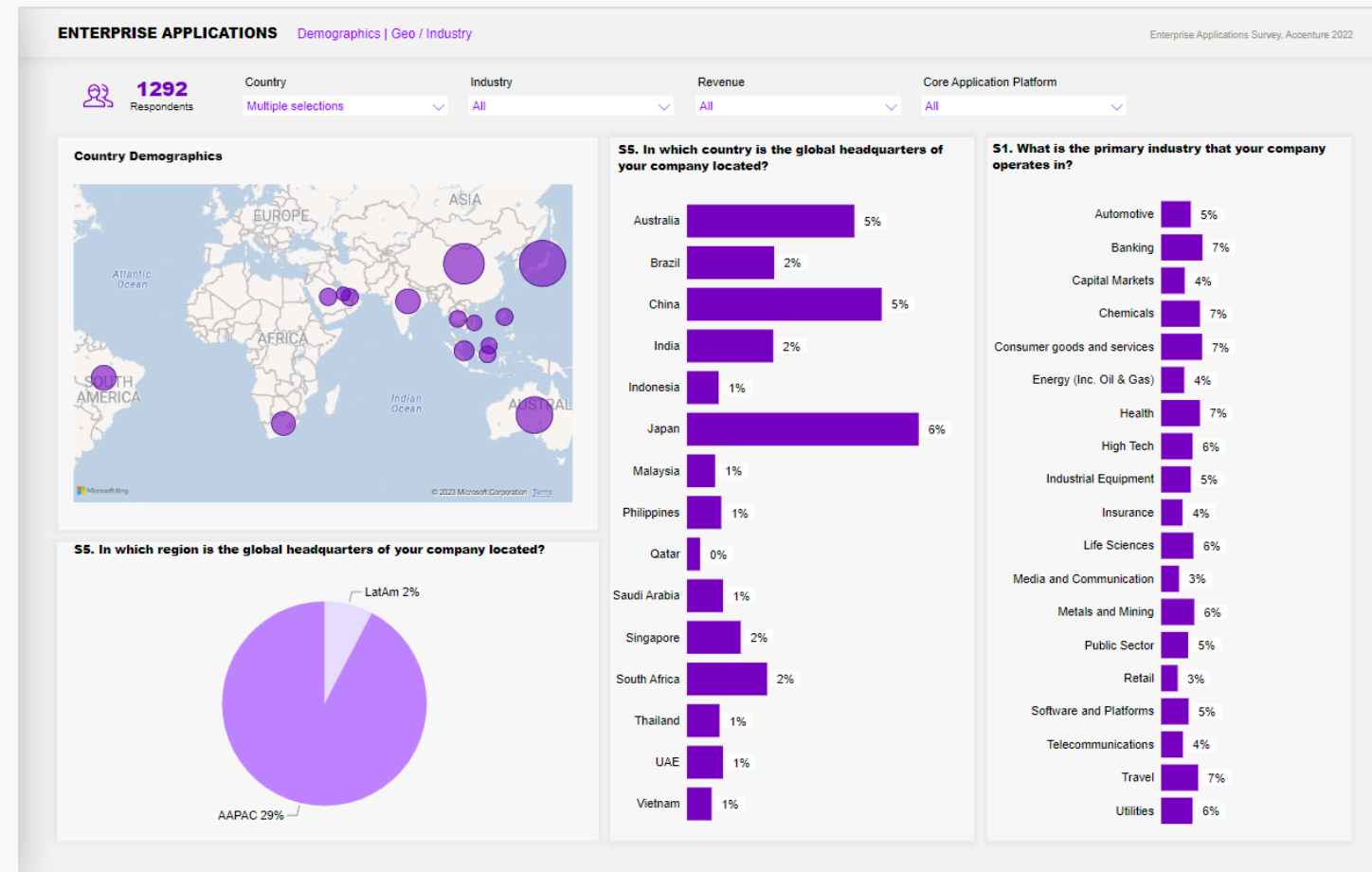


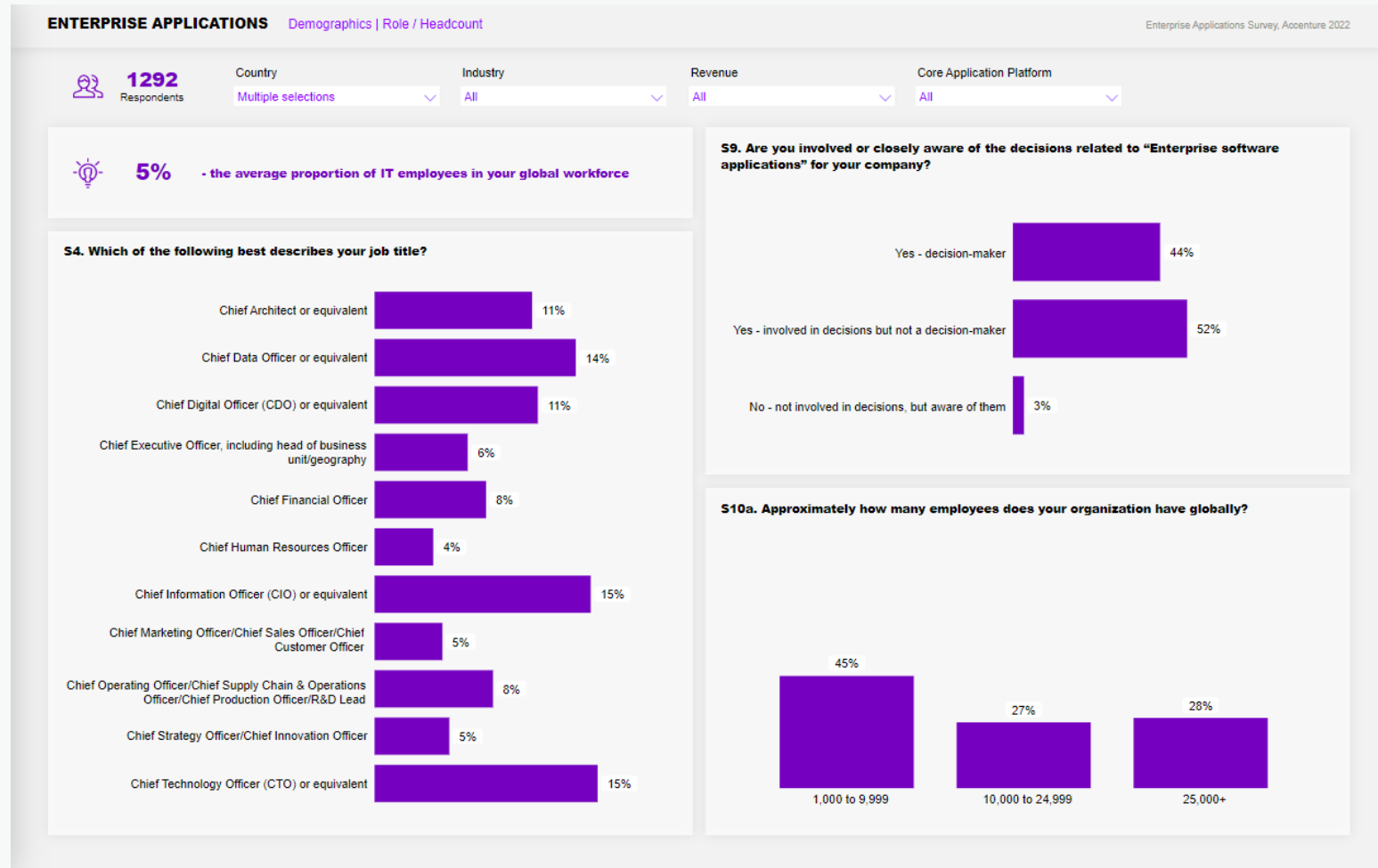
01. Survey

The Accenture survey, completed in Spring 2022, collected data on:

- A)** Technology ecosystem footprint, including the organization’s i) multi-ecosystem journey, strategy, and goals ii) cloud and data footprint iii) state of application integration
- B)** Business landscape, including i) business structure and transformation ii) reskilling iii) customer and employee experience iv) key challenges.
- C)** Financial and operational performance via multiple measures

The graphics below summarize the survey demographics for Growth Markets region.





Inference approach

First, we constructed two indexes,

- Diversity:** to assess whether a firm had expanded their ecosystem footprint, measured by whether an organization has increased the number of applications used over the last two years, and
- Interoperability:** to assess whether a firm had improved their application interoperability, measured by whether their self-reported application interoperability has improved over the last two years.



Using these two indexes as dummy variables, we grouped all global 4,053 as well as 1,292 respondents in Growth Markets into three groups. The first group, which had not improved Diversity over the last two years, regardless of their Interoperability score, was named companies with low/no interoperability. The second group, which had improved Diversity but not improved its Interoperability was called companies with medium interoperability. The remaining respondents, who had improved both their Diversity and Interoperability were named high interoperability. In Growth Markets, each group had roughly a third of the respondents (~33%, or ~430). In other words, we identified three equal sized groups of companies, one of which was in ecosystem stasis (companies with low/no interoperability), one that was expanding ecosystems but not improving integration (companies with medium

interoperability), and finally, one that was leading in terms of both ecosystem expansion and integration across these ecosystems (companies with high interoperability). We then investigated how being in each group correlates to measures of performance.

Calculation of the performance difference

Using the definitions above, we compared the difference in performance between these three groups—with metrics such as cost savings, revenue growth, employee productivity, and how successful they have been at achieving business goals such as reinventing customer experience and achieving efficiency in supply chain operations.





02. Interviews and Case Studies

We triangulated our findings from the survey's large-scale global primary data with 25 in-depth interviews and 40 case studies.

Overall, we collected through secondary research and interviews about 65 case studies focusing on issues organizations are facing on their multi-ecosystem journey and the evolution of organizations toward the multi-ecosystem world.

To analyse the qualitative data (QDA) of the 25 in-depth interviews, we leveraged ATLAS.ti⁹, a tool that accelerates the QDA by automatically generating deep insights across the interview transcripts.



03. Collective Intelligence via an Enterprise Crowdsourcing Platform

To understand the organizational and human implications of multiple ecosystems, we used ThoughtExchange¹⁰, a qualitative platform designed to bring people together on important topics and gain their collaborative insights. Thirty-five C-suite participants were asked to share their ideas in response to an open-ended question on how their organization increases cross-functional alignment (organizational impact of integration) while preserving the unique features of each function (organizational impact of diversity). Participants shared their own ideas, rated the

thoughts others have provided on a scale of one to five stars, and viewed how the thoughts in the exchange were rated by the group.

Through this process, we aimed to surface the practices that are top-of-mind for C-suite executives as a collaborative effort and enrich our storyline.



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Emma McGuigan leads **Enterprise & Industry Technologies**, which helps clients achieve enterprise-wide transformation by bringing Accenture's deep technology, functional and industry expertise across SAP, Microsoft, Oracle, Salesforce, Workday, Adobe and other leading platforms. For these IPS platforms, Emma oversees Accenture's relationships, strategy and capabilities globally and across all industries. She is a member of Accenture's Global Management Committee.



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Pradeep Roy is a Managing Director at Accenture and leads global Technology Research. He is most active on topics which explore the **innovation potential of technology** to drive business reinvention and enable socio-economic transformation to create 360-degree value.

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- 7 Based on average wages per hour data from US Bureau of Labor Statistics (<https://www.bls.gov/news.release/empsit.t19.htm>). Calculation: Productivity gain with interoperability x Average hours worked per day per employee (8 hrs) x No. of employees (10,000) x No. of working days in a year (260) x Average wages per hour (\$32 as of June 2022 per US Bureau of Labor Statistics)
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