



Elevate every decision with future-ready **network** operations

Fast-track to future-ready performance

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Communications service providers deliver the digital dial tone that powers daily life. But when your whole industry sees a dramatic shake up, how do you build on momentum to win in the market?

In the last few years, the telecoms industry has seen demand grow like never before. Unlike other industries, Communications Service Providers have stepped up and kept the world together during a period of unprecedented global volatility. But what now?

In an environment of compressed transformation and exponential demand, it's imperative that CSPs balance present needs with reimagining the communications experience.

Now is the time to build on this momentum and transform your business.

Elevate every decision with future-ready network operations



Over the past few years, CSPs were already facing massive changes in the industry. The decoupling of software from hardware—and the disaggregated mode of network constructs that the industry continues to witness and adopt—have been driving shifts in business and operating models for years. Network cloudification, private networks and 5G are transformational forces in their own right that have also been radically redefining customer needs, revenue streams and growth opportunities.

Telcos have a choice following these transformational shifts: relish in the knowledge it was a job well done and settle where they are, or continue to evolve their business to take their services, customers and profits to the next level.

New entrants are also redefining value propositions and innovating product and service portfolios quickly to woo the next generation clientele. Traditional CSPs are falling behind and failing to differentiate despite the responsiveness shown during the recent pandemic.

The reality is that CSPs should be innovating more and at a faster pace. Rather than over-index on engineering and technical capabilities, there is an opportunity to shift focus to customers and employee experiences—and to the underlying operations needed to monetize and generate new value from them.

CSPs are at a crucial turning point. Will they stick with the status quo and watch competitors drive the market? Or will they leverage shifts made during the pandemic and reinvent their business for a new era?

What's needed is a profound shift from delivering efficiency and revenue through commodity products and services to unleashing the power of data for innovative products and services, that change how people live and how businesses function. The starting point is balancing technology, human ingenuity, processes and data in an intelligent operating model. The method to achieve this is to look at operational maturity as a whole.



Elevate every decision with future-ready network operations

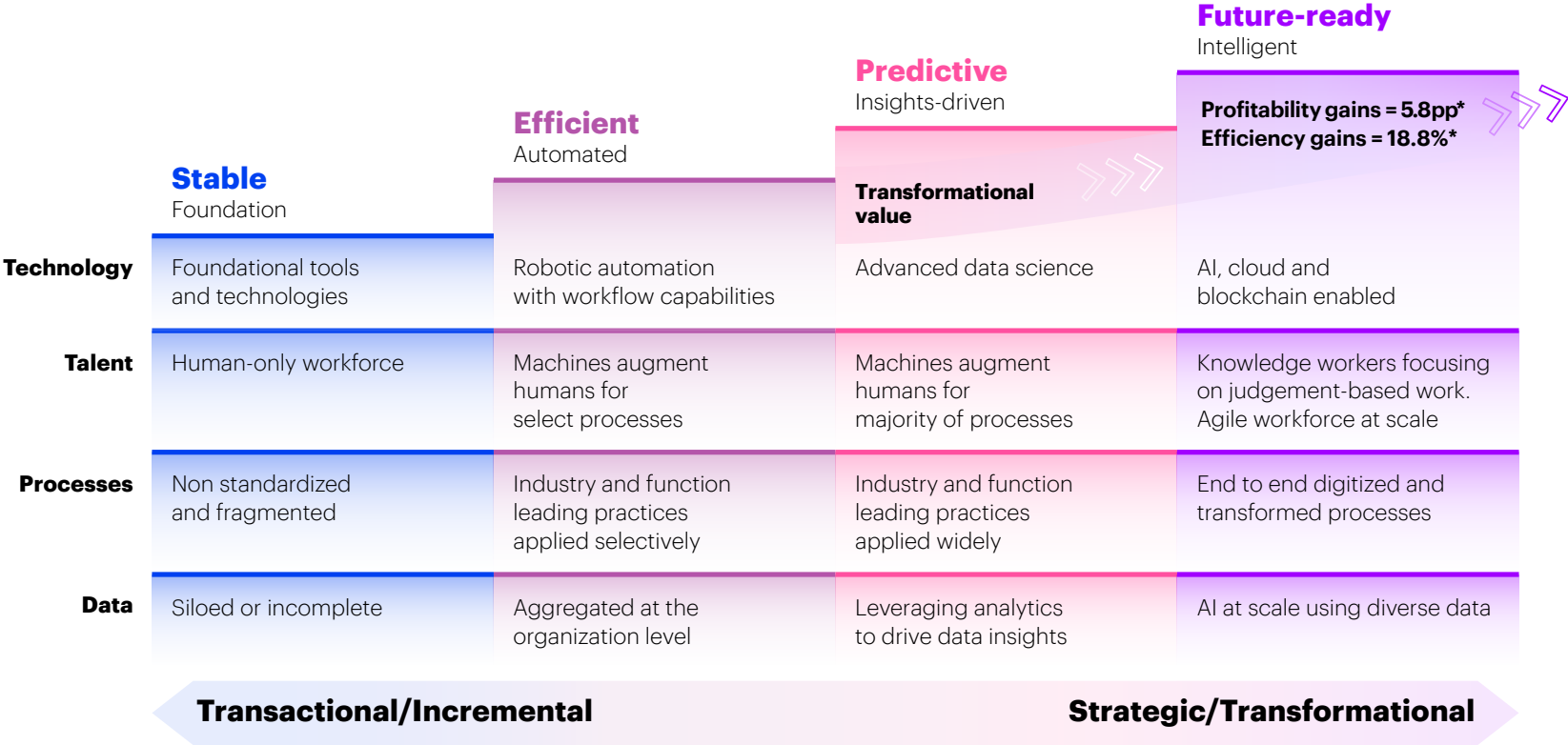
Why your organization needs to be future-ready

An intelligent operating model has a high level of operations maturity. But how mature are operations in this industry today? To find out, Accenture conducted a global, cross-industry study of over 1,100 senior executives—including 50 CSPs. The research provides an intriguing cross-industry and cross-functional view. It shows how respondents perceive their operations maturity and quantify the link between business, operations maturity and performance.

This research and our experience reveal four levels of operations maturity: **Stable, Efficient, Predictive and Future-Ready.**

Each level is grounded in and enabled by progressively more sophisticated technology, talent, processes and data insight (Figure 1).

Figure 1.
The four levels of operations maturity



*Accenture experience shows that additional productivity and efficiency gains up to 30% can be seen in organizations displaying future-ready characteristics.
 Source: Accenture Research and Oxford Economics Intelligent Operations Survey, 2020

Achieving the highest level of maturity possible means that some organizations become “future-ready.” **And on average, organizations we found to be future-ready showed a 2.8x boost in corporate profitability and 1.7x higher efficiency than those at lower maturity levels.** Future-ready organizations—which are just 7% of all the organizations surveyed across industries—also outperform others, improving the talent mix and reskilling as well as in customer experiences and ecosystem relationships.

To become future-ready, incremental change and a transactional focus are not enough. To move to this stage, CSPs must truly transform operations, rethinking the human+machine balance.

Accenture’s research demonstrates the extent to which CSPs have evolved their operations. Just three years ago, 32% of those surveyed had predictive operations. Today, 70% do.

This means that they are insight-driven and proactively improving performance across teams, processes and functions using technologies like artificial intelligence (AI) and machine learning (ML) to be more predictive.

However, of all the potential gains from moving from one maturity level to the other, the greatest come from the shift up from the predictive level to future-ready.

What communications service providers think

Our research indicates that CSP executives think they have made significant progress in recent years in operations maturity.

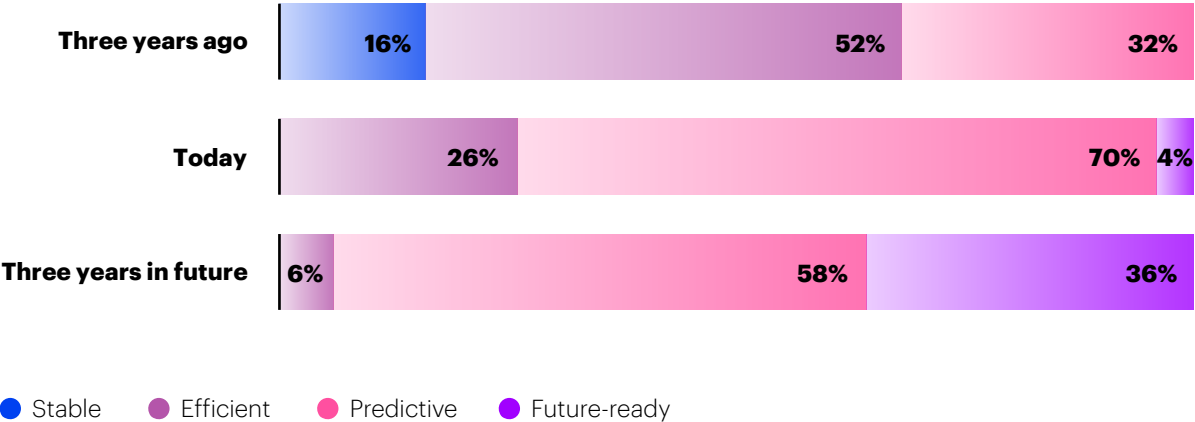
Cross-industry comparisons reveal that Communications outpaces all other industries in predictive operations. Many CSPs have invested heavily in their Operations Support Systems (OSS) and understand the need to use data analytics solutions to drive efficiency and gain insight into potential business challenges.

That said, understanding the need to deliver end-to-end digitized process—and seeing success from doing so—are not the same thing. Just 4% of CSP executives say that their organization is future-ready today, which is below the cross-industry average.

Even so, leaders aspire to make significant progress over the next three years. Over one-third (36%) expect to be future-ready by 2023 (Figure 2), but is the industry making the pivot fast enough?

Figure 2.
While a small percentage of CSPs are future-ready today, they have high aspirations for their ability to become future-ready in three years

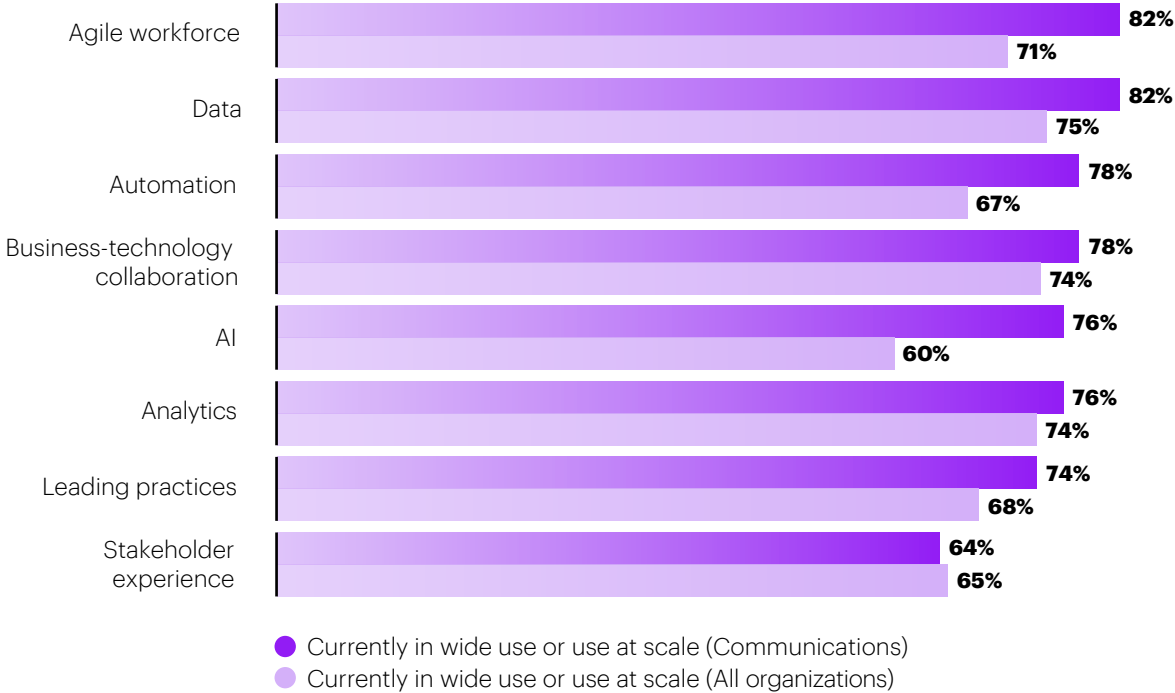
Percent of Communications Respondents* achieving each level of operational maturity three years ago, today, and three years in the future (expected).



The gap between where CSPs are and where they think they can go is wide. To understand more about leaders' views, here is how we measure future readiness. It reflects the ability to scale eight characteristics of operating model maturity: analytics, automation, data, stakeholder experiences, AI, business-technology collaboration, functional and industry leading practices, and workforce agility (see Appendix for definitions).

CSP executives report high adoption—wide use or use at scale—of all characteristics (Figure 3). They are most confident in their strengths in agile workforce and data and less confident in analytics and stakeholder experience.

Figure 3.
CSP leaders are very confident in their organization's ability to use the characteristics of operating model maturity at wide use or scale

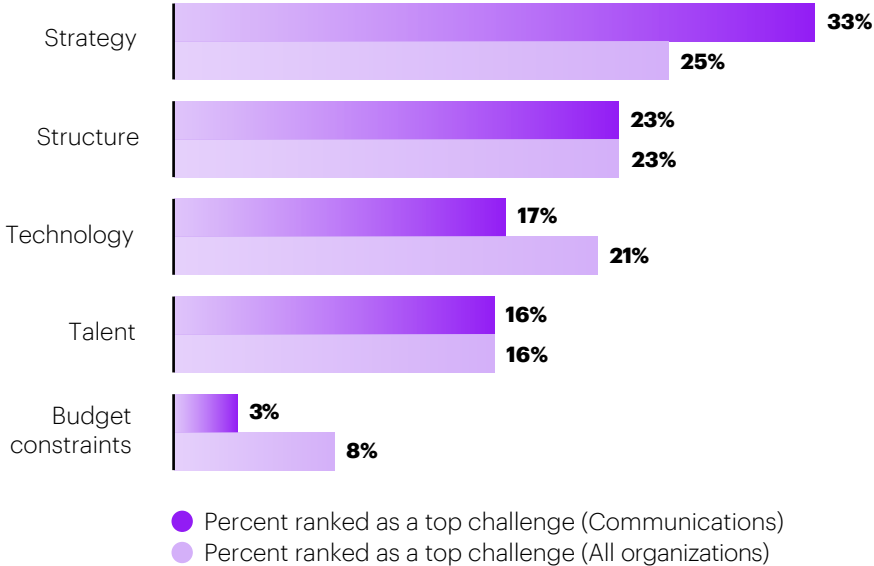


What's holding communications service providers back?

Considering CSP leaders' confidence in their ability to scale these key characteristics—and the fact that so many have achieved predictive operations—it seems incongruous that so few (4%) have made the final leap to future-ready operations.

Leaders may be overconfident in how well they deliver at scale. Even so, the biggest profitability and efficiency rewards come from leapfrogging between predictive and future-ready operations. Because this shift is the hardest one to make, the simple answer for the gap is that leapfrogging is sheer diligence with execution rigor that few are willing to attempt.

Figure 4. CSP leaders believe that strategy is their biggest barrier to scaling the characteristics of future-readiness



Communications is not lacking in structure or technology compared to other industries, but strategy execution is a barrier to operational transformation. This particularly holds Communications back in areas such as stakeholder experience and leading practices.

When we asked CSP leaders about the biggest challenges they face in improving operations, they said that strategy execution is the top barrier (Figure 4). It may be that CSPs are so ingrained in their current operations that strategies for new products never go anywhere, because they never get the operational muscle needed to succeed.

While it's clear a strategic pivot is in order, CSPs are not making it fast enough. Too many are still developing capability-focused strategies centered on moving data rather than on unleashing what data can do for their customers and business.



Future-ready network operations: How to answer the call

Operational maturity can help CSPs get to where they need to be: serving customers and competing in rapidly evolving markets by transforming the business through people, processes and technology. Our research reveals three things that CSP leaders should know to start the journey.

01

**Know the
ultimate goal**

02

**Know the
key steps**

03

**Know how to leapfrog
maturity levels**

01

Know the ultimate goal

Think big with strategy at the forefront



A structured, well-thought-out strategy will enable leaders to make the right operational investments. These investments will allow decision makers to get to the end goal faster than taking a tactical, incremental approach. Gone are the days of focusing on evolving decade-old practices—it's time to disrupt the process.

Using a truly customer-first approach and improving data quality will offer the scalability that CSPs need. Harnessing the advantages of the latest technologies and rethinking human-machine capabilities will provide the operational muscle to execute it successfully.

The ultimate goal should be leveraging data, analytics and automation to get to a customer-focused target outcome and drive the strategic development and implementation plans from there.

Collaborate across business and technology

Business and technology collaboration powers successful strategy execution. However, just 10% of CSPs say that business-technology collaboration is being used in their organizations today. A full 52% want to do this within three years.

It's time to break barriers, but bringing together business and technology interests in companies that have a strong engineering ethos is difficult. Within the last decade, some CSPs have managed to establish a single CTIO by merging network with IT functions, mostly at the apex level only. They are the exception rather than the rule and there is certainly work to be done to make business-driven IT the norm.

Some CSPs may think that they are doing this because they have shifted to DevOps. However, a closer look often reveals that it is being done at an operational level rather than at a strategic or direction-setting level.

There's also the issue that many of the network and IT investment programs are multi-year programs. It takes time to shift IT capability to meet new business needs or customer demands fast enough, but as shifting to software demands a shorter path to implementation—and monetization—this just isn't sustainable.

There is no silver bullet for bringing business and technology together. Yet an important aspect of it often gets overlooked: cultural alignment. The whole organization must be wired to embrace business and technology interests working in lockstep to deliver on customer-focused goals. This is more of a mindset alignment across all the stakeholders that can help them to synchronize their efforts to deliver the customer and/or business priorities. This helps CSPs improve the technology stack and get clarity around the business outcomes to expect from new enhancements and implementations. Having a common set of objectives or Key Result Areas (KRA) across technology and business teams can help to improve this alignment.



Redefining the way the world connects and rewriting the telco rulebook

As the world of communications and connected devices rushes towards a new era of data generation, a new mode of operation is a necessity. Rakuten planned to stay ahead of the curve by building Rakuten Mobile: a fully virtualized, cloud-native mobile network that is the first of its kind in the world.

Industry disruption and convergence are confronting operators head-on. They need to find a new approach to meet growing consumer expectations and modern enterprises' demands for agility and innovation. Simultaneously, the industry's traditional approach to network deployment and operations continue to create unrelenting pressure on balance sheets and P&L. These circumstances inhibit innovation and create real barriers to the rollout of next-generation technologies like 5G.

Rakuten Mobile understood these industry headwinds and sought a new way to sail through them: to not only be efficient as an operator, but as agile as a platform player.

Accenture collaborated with Rakuten Mobile as an operational enablement partner, designing and implementing multiple aspects of an innovative new cloud-native operating model. The aim was clear: enable the organization's speed and agility requirements to completely disrupt the industry.

02

Know the key steps

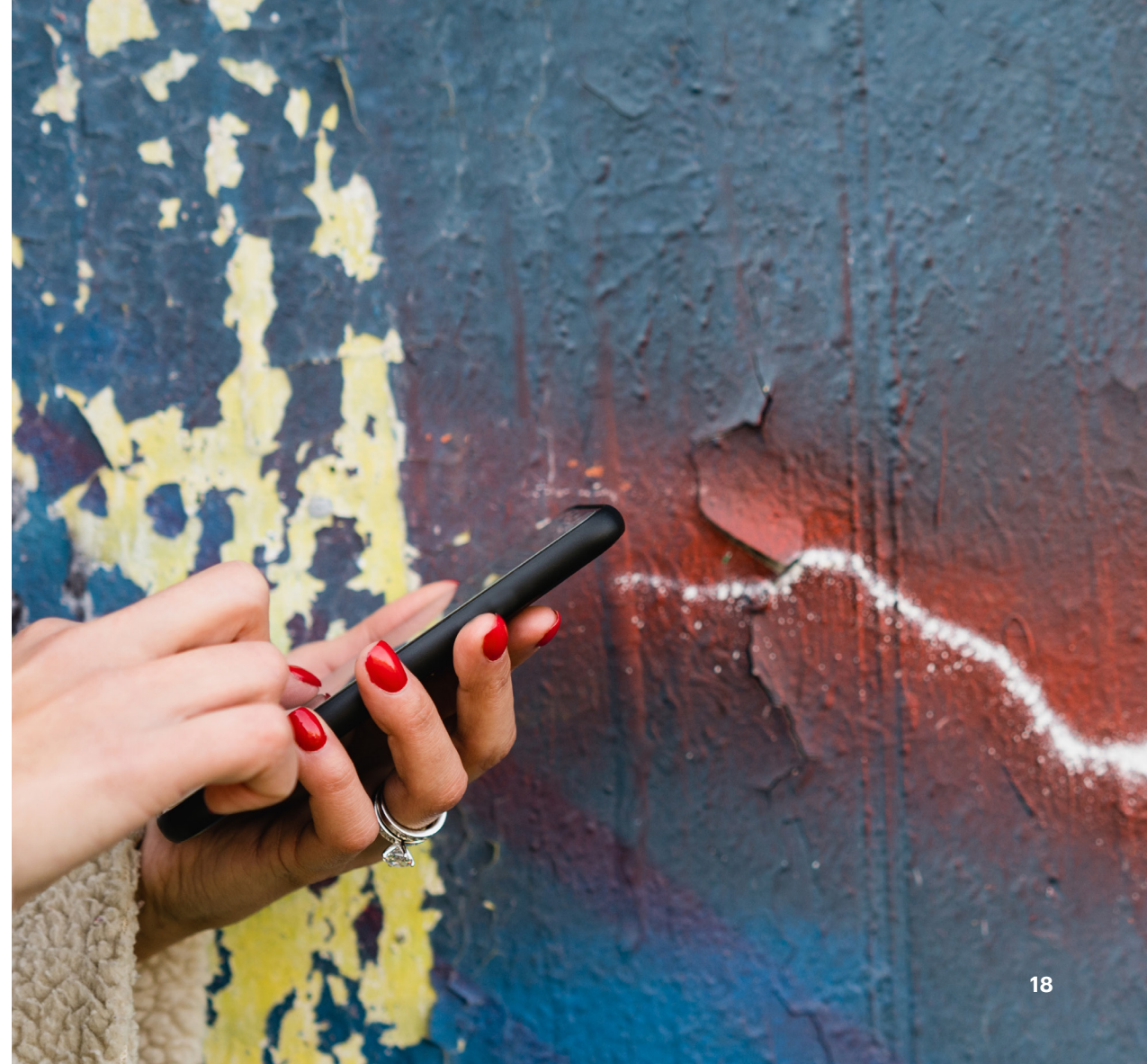
Automate at scale to
free up human talent

Elevate every decision with future-ready network operations

Across the board, automation is ranked as the key factor to digitization of business processes. CSPs are leaders in this area. They beat the cross-industry averages, and the percentage of CSPs at widespread or full-scale automation usage has increased more than 2.5x in the last three years.

CSPs are strong in this area because they are technology-focused companies by design. They have a track record of using automation to reduce the need for human interventions. “Zero Touch” or “Touch-free Operations” is a key aspiration for CSPs, but even so, there is room for improvement to get to a future-ready state.

A well-balanced human and machine operating model offers the best of both worlds. CSPs can use technology—investing in AI, cloud and diverse data to drive better experiences for customers and employees—while streamlining operations and enabling their teams to focus on more rewarding, creative and complex issues. The more that CSPs leverage human ingenuity, the better positioned they are to evolve ways of working to make the business more future-ready and relevant.



Commit to making insight-driven decisions—with better data

This industry has long struggled with data quality and integrity. Just 68% of the CSP executives surveyed say their companies design their operating models based on data rather than on experience and intuition. This is surprising given the technology backbone that these players have, and it may be why CSPs struggle to move from a predictive to future-ready state: while they can run intelligent operations in small use cases, they lack the data quality to do it well and consistently at scale.

While most (82%) CSPs have achieved widespread or full-scale use of data today, leaders acknowledge that their analytics capabilities are a weakness. Despite investments made to date, the industry is still lagging when it comes to running AI-powered operations that can take analytics capabilities to another level.

With the proliferation of digital services, new applications and cloud, the amount of data companies need to process, structure and maintain is not only enormous, but it's getting bigger all the time. Moving forward, the ability to work with both structured and unstructured data will be non-negotiable for operations transformation.

To leapfrog to a future-ready state, CSPs need to continue to improve their data landscape. They have the data, the reporting and the descriptive analytics capabilities as a starting point. They can certainly shore up their capabilities in deep data science and use it to drive smarter decision-making.



Elevate every decision with future-ready network operations

Scale cloud investments

Cloud is one of the most critical technologies being adopted today across all industries, and Communications is no exception. The industry has made great strides in this area and is in the top two industries for scaling cloud investments. An impressive 86% of CSP leaders say that their organization is using cloud at scale today.

But are these companies getting the full benefit of this implementation? CSPs that only look at cloud as a cost play are missing out on using it to boost innovation and drive new and more profitable business at scale.

The good news for CSPs is that cloud adoption is a natural movement for them. The pandemic further accelerated the adoption of hybrid and/or multi-cloud for CSPs to provide the connectivity lifeline across the globe. Having a data infrastructure in place gave them a head start, and the cloud will continue to support CSPs in furthering automation and AI implementation, causing a ripple effect of benefits across the organization.

By shifting mindsets from a cost to an innovation focus, CSPs can see their businesses reinvented by working across the partner ecosystem.

A photograph of a child jumping on a bed in a bright room. The child is wearing a blue long-sleeved shirt and red pants. The bed has white pillows and a striped blanket. A window in the background shows greenery outside. The text '03 Know how to leapfrog maturity levels' is overlaid on the left side of the image.

03 Know how to leapfrog maturity levels

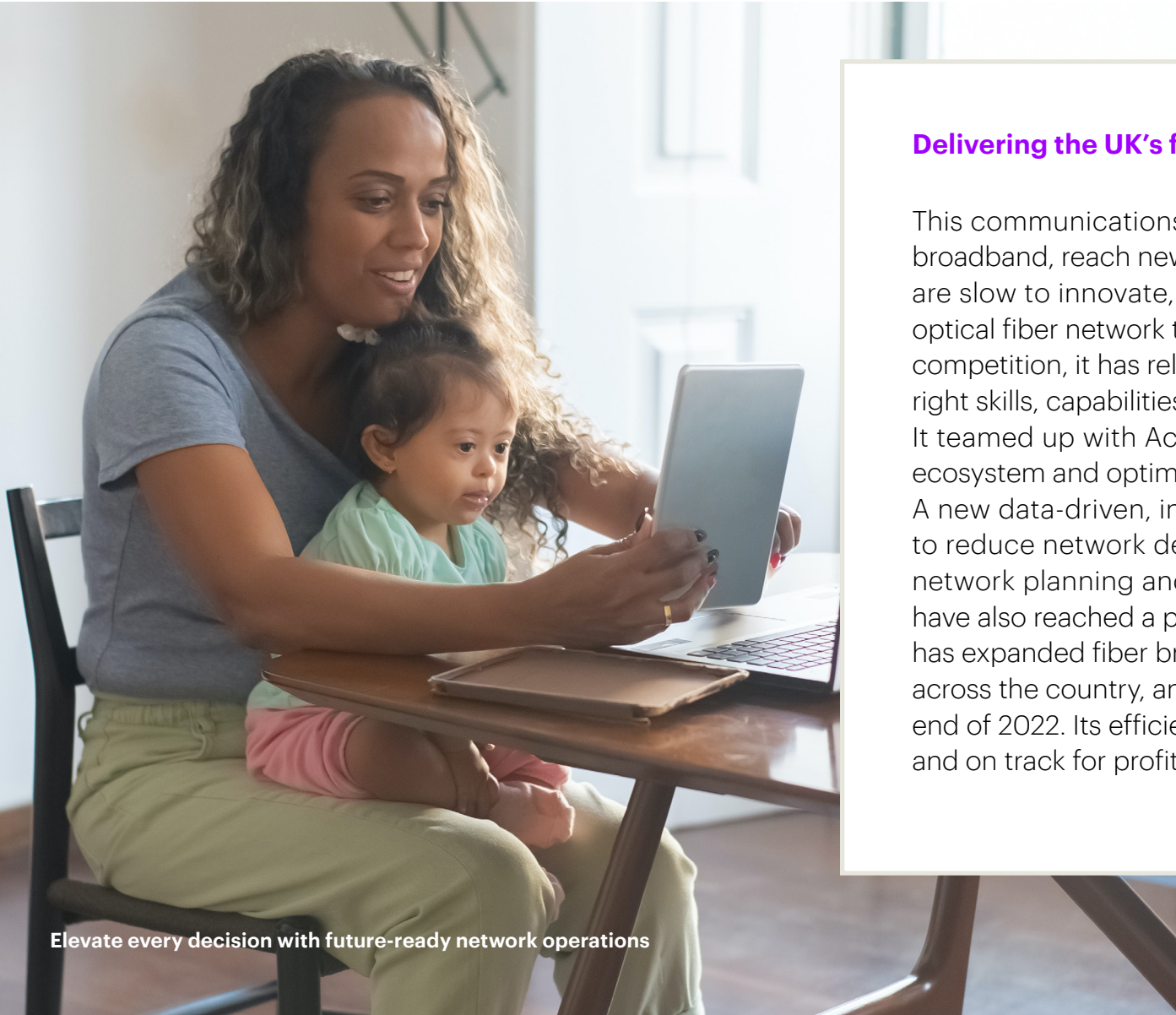
Build ecosystem relationships

Historically, CSPs have tended to do everything themselves. Yet the industry has been quick (compared to other industries) to develop ecosystem relationships in recent years. Forty-four percent of CSP leaders say that partnerships improved over the last three years, and 40% indicate that the pandemic boosted this focus.

Relationships with partners make operating models more flexible thanks to complementary skillsets, data and technologies. These relationships can make it possible to innovate faster and better with less upfront investment. While some traditional players have in-house incubation units, they often find progress limited by funding, culture and politics, resulting in short-term gains.

Collaboration—and co-creation—with the right ecosystem partners is a long-term play.





Delivering the UK's fiber future with intelligent network operations

This communications company is on a mission to expand ultra-fast broadband, reach new customers and maximize growth. While incumbents are slow to innovate, the company is striving to expand its high speed, optical fiber network to millions of homes and businesses. But to outpace the competition, it has relied on the support of a strategic collaborator with the right skills, capabilities and expertise to execute quickly and cost-effectively. It teamed up with Accenture to leverage its global network operations ecosystem and optimize its network planning, deployment and maintenance. A new data-driven, intelligent operating model has helped the company to reduce network deployment costs by around 30% while accelerating network planning and deployment from 80 to 50 days. Field operations have also reached a productivity rate of 95%. As a result, the telco provider has expanded fiber broadband to over 5 million households and businesses across the country, and plans to deliver 1 million new fiber connections by the end of 2022. Its efficient expansion is keeping the business ahead of rivals and on track for profitable growth.

Partner relationships with agile technology providers—and relationships with unconventional partners—are key to helping the industry push the limits of the products and services they can create. Bringing in people, tools and technology from other parts of the value chain to truly drive and deliver innovation enables CSPs to position their operations, services and data in a whole new light—and brings new ways to monetize their business.

CSPs can look to partners to help them better position their place in the 5G value chain and move beyond just providing connectivity. Otherwise, their share of its economic value could be marginalized down to the bytes they transport—which is already a commodity today.

The possibility of allowing new products and services to plug into their platform via Application Programming Interfaces (APIs) is a game changer for industry players. And with the right vision and ecosystem partners, it is within reach.

CSPs may have the right ideas and the right technical capabilities, but without the right ecosystem partners they're leaving themselves open to getting left behind in the market.

Now is the time to make your move to future-ready network operations.

While most CSPs have made progress in improving operations maturity to reach the predictive state, there is more to do. And fast. The landscape may be complex, and the competition intense, but the best operations transformation is always a process of continuous evolution.

With future-ready operations, CSPs will have the operational foundation they need to finally shift from the legacy world and deliver breakthrough network-based products and services.

The key is to balance technology, human ingenuity, process and data to transform operations at speed, delivering new value for whatever lies ahead for the organization

Here's how:

- **Think big** and go beyond incremental change with a customer-first strategy powered by data.
- **Enhance** intuition with the highest-quality, diverse data, integrating structured and unstructured data to drive outcomes.
- **Scale** automation and analytics, AI and integrated solutions with leading practices to break the final barrier between predictive and future-ready operations.
- **Foster** a specialized human + machine workforce to redefine how work gets done and attract the best talent with tomorrow's skills.
- **Put** a cloud infrastructure at the heart of operations as an engine of innovation and scale.
- **Build** complementary third-party and ecosystem relationships to break through the status quo and get the extra firepower needed to create new revenue streams.

Our research has shown if you fast-track the journey, your operations can become a true catalyst for competitive advantage. And, along the way, you can elevate your business decisions to realize tangible, sustainable, transformational value and growth.

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Acknowledgments

The authors would like to thank the following for their contributions to this report:

Research Lead

Laurie A. Henneborn

Network Operations Marketing
+ Communications Lead

Alison L. Jones

Project Team

Susan Austin

Gaurav Narang

We defined the four levels of operations maturity based on respondents' assessments of eight characteristics:

Analytics

Covering the discovery, interpretation and communication of meaningful patterns in data to provide superior insights for business decision-making. Analytics includes multiple levels from basic descriptive reporting to more predictive and prescriptive actions which can be applied to business processes.

Artificial intelligence

The ability of a machine to perform cognitive functions like sensing, comprehending, acting and learning. AI capabilities (for example, natural language processing, machine learning) enable computers to make decisions and identify patterns and insights for future decision making.

Automation

Sets of technologies that perform repetitive rule-based tasks. Robotic process automation (RPA), one of the most frequently used examples, increasingly includes multiple solutions such as workflows, platforms and software-as-a-service that further digitize the process.

Business-technology collaboration

Comprising IT and business functions with joint governance models, enabling integrated ecosystem partners and driving the organization's strategic road map.

Data

The quality, scope and depth of structured and unstructured data (for example, video, web content, voice memos, and so on) from diverse internal and external sources, including what is embedded in internal processes.

Functional and industry leading practices

Ways of doing business within a function, organization or industry that are recognized as enabling best-in-class performance.

Stakeholder experiences

The overall engagement experience across all stakeholders of an enterprise including customers, end clients, suppliers, partners and employees.

Workforce agility

Encompassing two key elements: on-demand, collaborative workforce strategy and a work environment where humans and digital machines work together to drive the best outcomes.

What we did

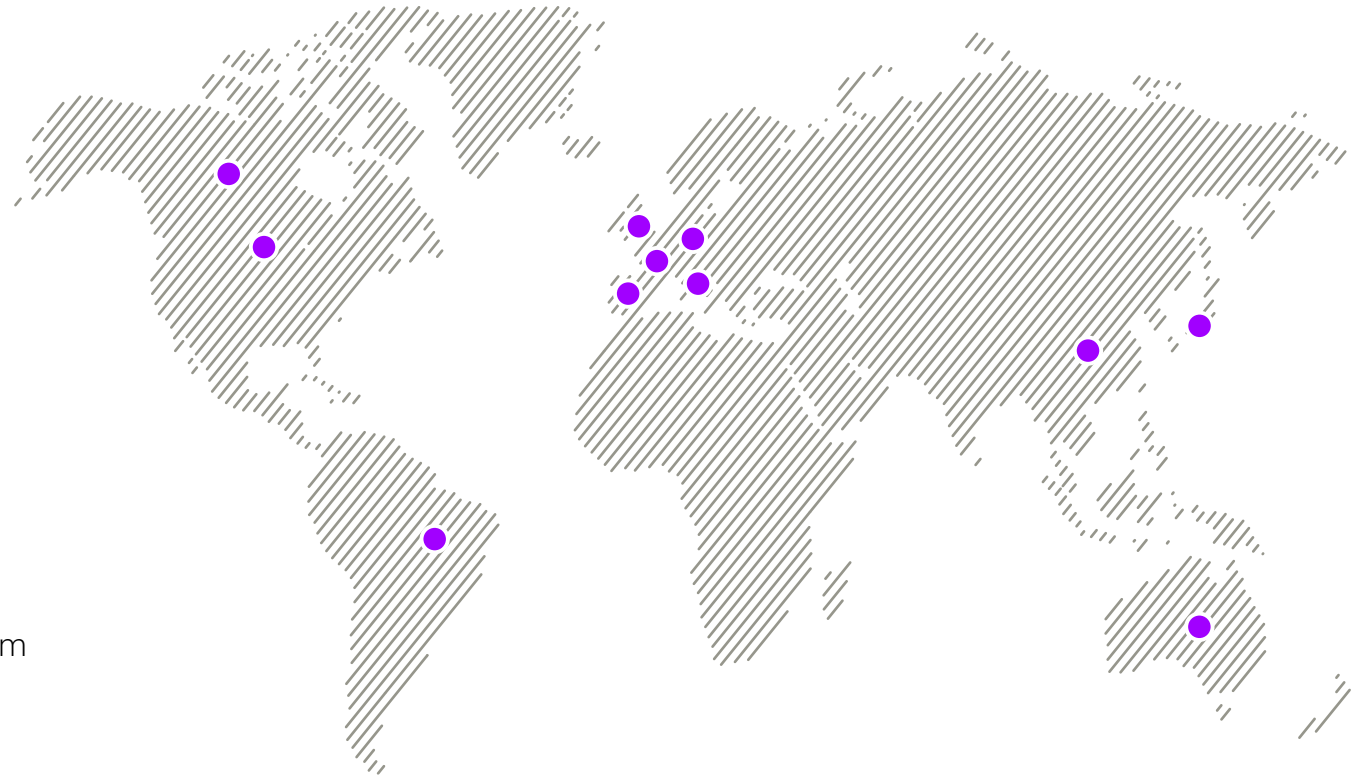
Primary research

Accenture Operations and Accenture Research undertook a 2020 survey, run by Oxford Economics, among 1,100 executives globally—44% of whom were C-level or equivalent—across 13 industries and 11 countries. Oxford Economics also conducted 12 in-depth, off-the-record interviews with executives across countries and industries.

11 countries

125	Australia	50	France	50	Spain
50	Brazil	50	Germany	125	United Kingdom
50	Canada	50	Italy	375	United States
50	China	125	Japan		

Figure 5.
Survey demographics Part 1



Source: Accenture Research and Oxford Economics Intelligent Operations Survey, 2020

Figure 6.
Survey demographics Part 2

Industry

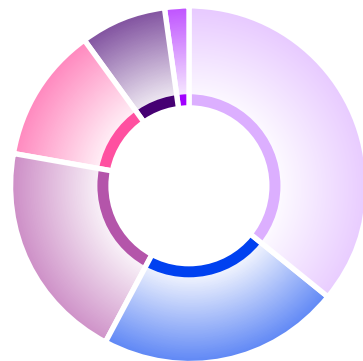
50 | Communications

Country

6	Australia	3	Italy
6	Brazil	1	Japan
3	Canada	4	Spain
1	China	8	UK
2	France	13	United States
3	Germany		

Revenues

10	US\$2B to US\$2.9B
18	US\$3B to US\$5.9B
11	US\$6B to US\$9.9B
6	US\$10B to US\$19.9B
4	US\$20B to US\$49.9B
1	US\$50B or more



Roles (to nearest equivalent)

2	Chief Financial Officer
3	Chief Information Officer
2	Chief Operations Officer
1	Chief Sales Officer
2	Chief Procurement Officer
3	Chief Marketing Officer
3	Chief Technology Officer
7	Chief Executive Officer

Figure 7.
Survey demographics Part 3

Industry

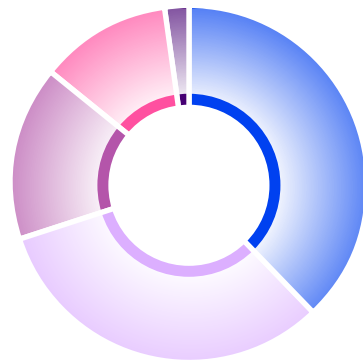


Country

6	Australia	1	Italy
6	Brazil	1	Japan
3	Canada	2	Spain
1	China	8	UK
8	France	10	United States
3	Germany		

Revenues

19	US\$2B to US\$2.9B
16	US\$3B to US\$5.9B
8	US\$6B to US\$9.9B
6	US\$10B to US\$19.9B
1	US\$20B to US\$49.9B



Roles (to nearest equivalent)

2	Chief Financial Officer
2	Chief Information Officer
1	Chief Operations Officer
2	Chief Sales Officer
3	Chief Human Resources Officer
3	Chief Marketing Officer
3	Chief Technology Officer
7	Chief Executive Officer
2	Direct report to Chief Executive Officer

Economic modeling

Our modeling is based on data from the 2020 Accenture Research and Oxford Economics survey. Each participant was asked about their company characteristics (for example, industry, employment and revenues) and past, current and expected level of operating maturity. Financial data from 2017 to 2019 for each public company was matched from S&P Capital IQ including EBITDA, revenue growth and total shareholder return.

We identified a group of future-ready organizations based on their operating model maturity and analyzed the key underlying factors and operational maturity actions that differentiate these organizations from their peers. This involved developing and implementing econometric models of the relationship between organizational differences in operating maturity position (based on four categories: stable, efficient, predictive, and future-ready, which identify increasing levels of operational maturity) and key financial outcomes. See Figure 7.

The modeling framework also controls for background differences across firms such as geographic location, industry and size. Using our model, we were able to assess the nature and magnitude of the connections between operating maturity, business investments and business outcomes. For example, we found that companies that were just a single step higher up the ladder of operational maturity in 2019 exhibited, on average, better returns. Moreover, investments in leading practices AI and automation were most strongly linked with improved performance.

Scenarios: Using our model and secondary data from S&P Capital IQ, we assessed the implications of hypothetical scenarios of companies raising their maturity level. For example, if all companies were to take a one-step improvement (for example, from stable to efficient) then global profitability, captured by EBITDA, could rise by as much as US\$1.9T (17%). If they were all future-ready, then profits could be US\$5.4T higher (48%).

The report includes case studies and stories from our own experience of guiding 400 clients on the journey to intelligent operations—33% of Fortune 500 companies or 60% of Forbes G2000 companies.

We have helped organizations in 20 countries (Australia, Belgium, Brazil, Canada, China, France, Germany, Greater China, India, Ireland, Italy, Japan, Netherlands, Singapore, Spain, Sweden, Switzerland, United Arab Emirates, United Kingdom and United States) and 18 industries (Automotive, Banking, Capital Markets, Chemicals, Consumer Goods & Services, Communications & Media, Energy, Health, High Tech, Industrial, Insurance, Life Sciences, Natural Resources, Public Services, Retail, Software & Platforms, Travel and Utilities) to achieve intelligent operations.

Figure 8.
Measures of financial performance

The tables below describe the various financial metrics used in our modeling:

Financial metric

EBITDA, % of revenue

**Operational efficiency
(OPEX per dollar revenue)**

- Revenue growth
- Total return to shareholders
- Changes in market capitalization
- Productivity (revenue per employee)
- Return on invested capital, %
- Operating profit, % of revenues

Alternative variants of the financial metric

- Change (total and average) in metric since 2019 vs 2016
- Three-year average metric 2017 to 2019
- Metric in 2019
- Dummy variable identifying companies in the top percentile of revenue growth, profitability and efficiency

We were only able to find robust, statistically significant relationships for **profitability** and **operational efficiency**.

References

- 1** Accenture, “Fast-Track to Future-Ready Performance,” at <https://www.accenture.com/us-en/insights/operations/future-ready-operations>
- 2** Unless otherwise noted, data is from the Accenture Fast-Track to Future-Ready Performance Survey

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About Oxford Economics

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