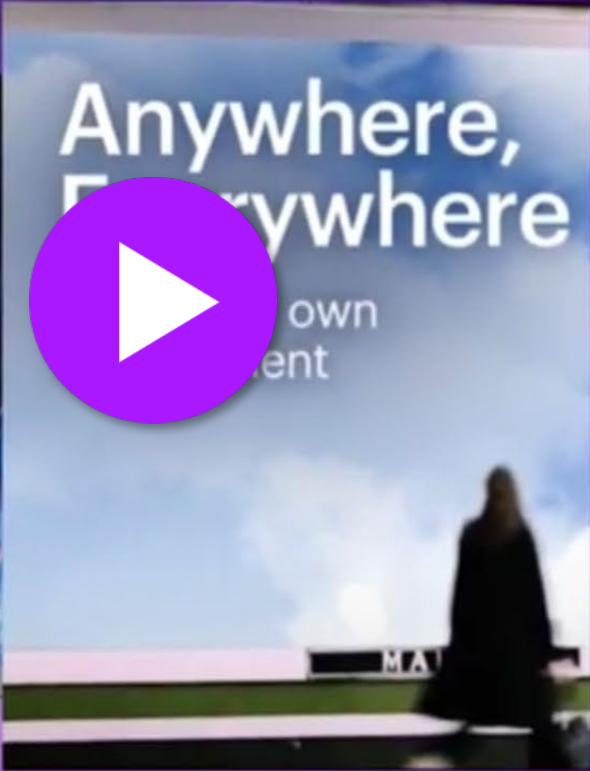
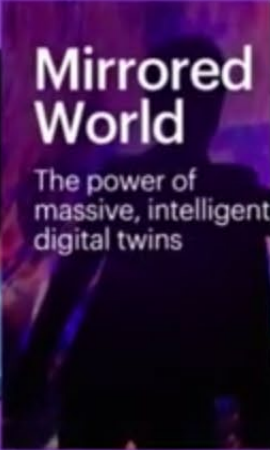


Technology Vision 2021

# Leaders Wanted

Masters of Change at a Moment of Truth  
Executive Summary





The world is hungry for a new kind of leadership. Amid the challenges of 2020, two truths became evident. More companies than ever have embraced the axiom that every business is a technology business, and they've ignited a new era of exponential transformation as technology continuously reshapes industries and the human experience. Now, as we begin shaping our post-pandemic reality, companies must learn to **master change**.

## For years, enterprises have been optimistic in their self-assessments, thinking they're further along in their digital transformations than they really are.

Adaptability, innovation, connectedness—pick a metric and businesses asserted they were leaders in the space, ready for anything. But 2020 and the COVID-19 health and economic crisis cleared their rose-colored glasses, bringing a new reality into sharp focus: Inflexible work arrangements and operations. Fragile supply chains. Untrustworthy information. New customer needs. The pandemic and the resulting disruptions exposed the limitations of long-standing norms for how companies operate and how people live.

Forced to recognize this deepening digital achievement gap, companies began to compress their decade-long transformation agendas into two to three-year plans. Leaders pivoted to focus on building a digital core that would allow them to simultaneously transform multiple parts of their enterprises and their talent. In essence, they began looking at technology as a saving grace in an unpredictable time, allowing them to accelerate their efforts to minimize the disruptions of the pandemic. Amid this chaos, enterprises not only pivoted faster than they believed they could, they started demonstrating the adaptability, innovation, and connectedness that they *thought* they'd already achieved.<sup>1</sup>

# 2–3x revenue growth

A recent study revealed that digital leaders (the top 10 percent of companies leading technology innovation) achieve 2–3x revenue growth as compared to their competitors—a widening divide that Accenture calls the “Digital Achievement Gap.”

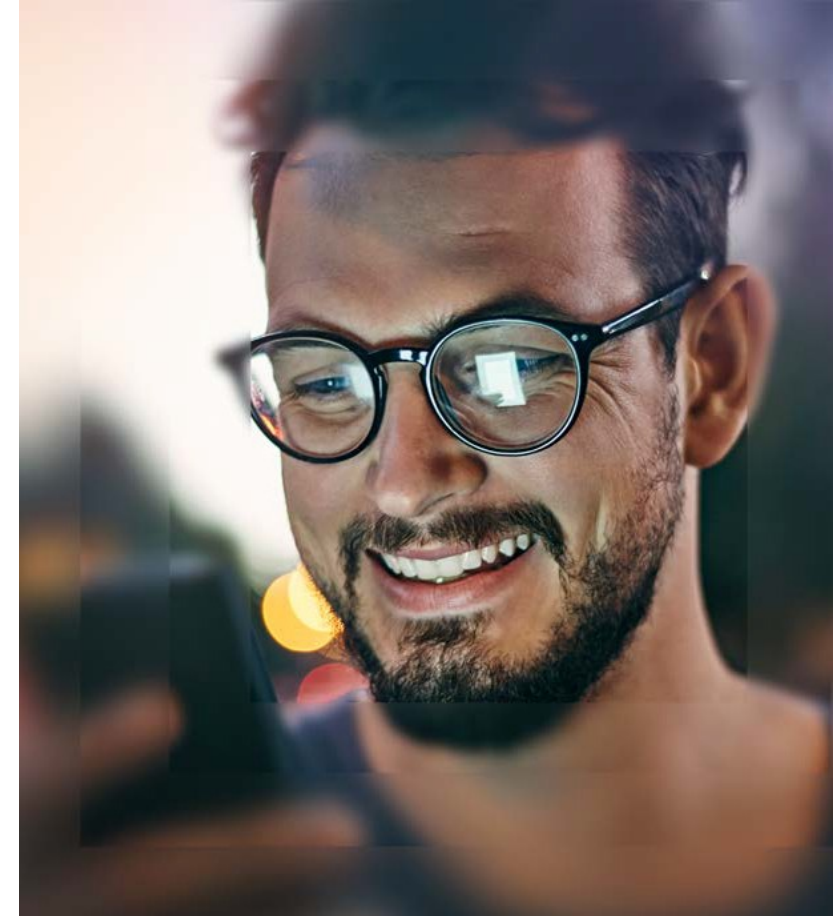




This journey of reinvention, however, has only just begun. The pandemic radically accelerated changes that companies knew were coming but didn't expect to see so soon. Major shifts that were predicted to materialize in years are happening here and now: industry convergence, localized supply chains, mass virtualization, and rapidly and continuously changing customer expectations. But, while immediate changes are clear, there's less clarity than ever into what our long-term future holds.

We're left with a global set of circumstances we've never seen before. On one hand, we have widespread and accelerated digital transformation coupled with the digital building blocks to create almost anything. On the other, we have blank slates in every industry waiting for the next vision of the future to be defined. Combined, it's an opportunity we may never see again in this generation: to actively shape our future almost from the ground up. But this is a challenge that demands a new kind of leadership. Leading in the uncertain future will require companies to become **Masters of Change**.

The single biggest reinvention of industry in living memory has been ignited. People and the world need leaders who will look beyond today's triage effort and start building what comes next. While it will be tempting for companies to retreat to what they know, 2020 brought the need for a different path forward into clear focus. If businesses continue to have a clear-eyed perspective and sharp focus on their expedited digital transformations, reimagining everything from their people, to data, architectures, and ecosystems, they can emerge as leaders.



# Leadership Demands Technology Leadership

We always talked about how technology would come to change the world, and now that enterprises across industries have accelerated their digital transformations all at once—it has. The era of the fast follower is effectively over. Perpetual change is here to stay, and leaders must not only embrace it, but catalyze it.



## During the pandemic, it became starkly clear that there is no leadership without technology leadership.

Just look at the restaurant industry. As lockdown and shelter-in-place mandates around the world closed traditional dine-in experiences, major chains started to declare bankruptcy.<sup>2</sup> In fact, 60 percent of the restaurants listed as “temporarily closed” on Yelp in July were out of business permanently by September.<sup>3</sup> Six months into the pandemic, the National Restaurant Association reported that nearly three million workers remained unemployed, and the food service industry was on track to lose \$240 billion.<sup>4</sup> And yet, through this chaos Starbucks emerged as a leader.

Starbucks had a digital transformation well underway by 2020, and when the pandemic hit, that transformation evolved from a strategic initiative to a vital airbag. The company’s mobile app, which allows users to customize orders and pay for drinks with their phones, proved invaluable as contactless transactions rapidly became the norm. By August,

three million new users had downloaded the app, and mobile ordering and drive-thru pick up combined accounted for 90 percent of sales.<sup>5</sup> Starbucks used technology to reinvent its customer experience for a changed world, and when demand surged, it doubled down. The company pushed out a new integrated ticket management system to combine orders from Uber Eats, the Starbucks app, and drive-thru customers into a single workflow for baristas, and introduced a new espresso machine laden with sensors to help staff track how much coffee was being poured and predict necessary maintenance.<sup>6</sup>

Starbucks was prepared to lead when uncertainty hit, but not every company was as fortunate. A year ago, many were content to do ‘just enough’ to keep pace with their competition. Case in point: Every year Gartner surveys manufacturers on their current and planned levels of cloud deployment across enterprise systems. And every year from 2014 to 2019

enterprises reported deployment levels between 8 and 13 percent and expressed the expectations that they would reach between 30 and 50 percent in three years. Or, as the Gartner analysts put it: “manufacturers had been planning to move to the cloud in three years, for the last five years.”<sup>7</sup>



# 90%

of business and IT executives in our survey agree that to be agile and resilient, their organizations need to fast forward their digital transformation with cloud at its core.

In the last 12 months however, this mindset has started to change. Eighty-two percent of IT executives reported ramping up their use of cloud technologies in direct response to the crisis, and 66 percent of the respondents reported that they will continue to grow their use of cloud for the foreseeable future.<sup>8</sup> Ninety-five percent of companies said they are seeking new ways of engaging customers as a result of COVID-19.<sup>9</sup> From food delivery platforms that kept restaurants connected to customers to the rise of telehealth services and e-commerce, the pandemic opened enterprises' eyes to a new reality. Cloud is now at the core of the company, not just the periphery, and technology is no longer just one vehicle for success— it's the vehicle all possible success depends on.<sup>10</sup>

And what started as an attempt to solve immediate problems during the pandemic has quickly become an opportunity to rapidly re-platform the enterprise, create entirely new kinds of value, and become an industry leader. Ford created 10 interactive augmented reality videos to help customers experience the new electric Mustang Mach-E without needing to go for test drives.<sup>11</sup> Potential customers can explore all the features of the new car using a completely interactive 3D model, while

hearing directly from the designers and engineers who were involved in its creation. In another case, D-Wave, one of the leading companies exploring quantum computing, gave free access to its "Leap" quantum cloud platform to anyone working on solutions for COVID-19—an effort that exposed many to the utility of quantum computing.<sup>12</sup> And Neolix, a Beijing-based maker of robo-delivery trucks, reported soaring orders as the pandemic cleared cars off roads and opened customers' eyes to the advantages of driverless delivery.<sup>13</sup> By accelerating their transformations to meet the needs of a world in crisis, these enterprises ignited a new and different future—one predicated on technology.

Rapid digital acceleration during the pandemic has cemented technology as the cornerstone of global leadership. 'Just enough' is not enough now. The gap between digital leaders and laggards grows by the day and committing to a wait-and-see approach will land companies on the wrong side of that gap. Leadership demands that enterprises prioritize technology innovation in response to a radically changing world. Small pilots and incremental scaling are an obsolete luxury, and the friction between research, development, and large-scale deployment must diminish or disappear.

63%

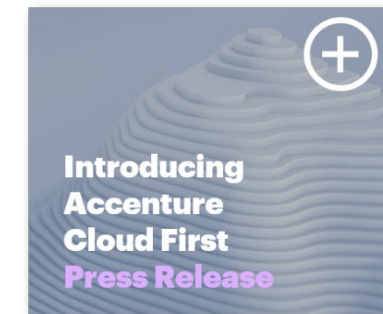
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of executives report the pace of digital transformation for their organization is accelerating.

92%

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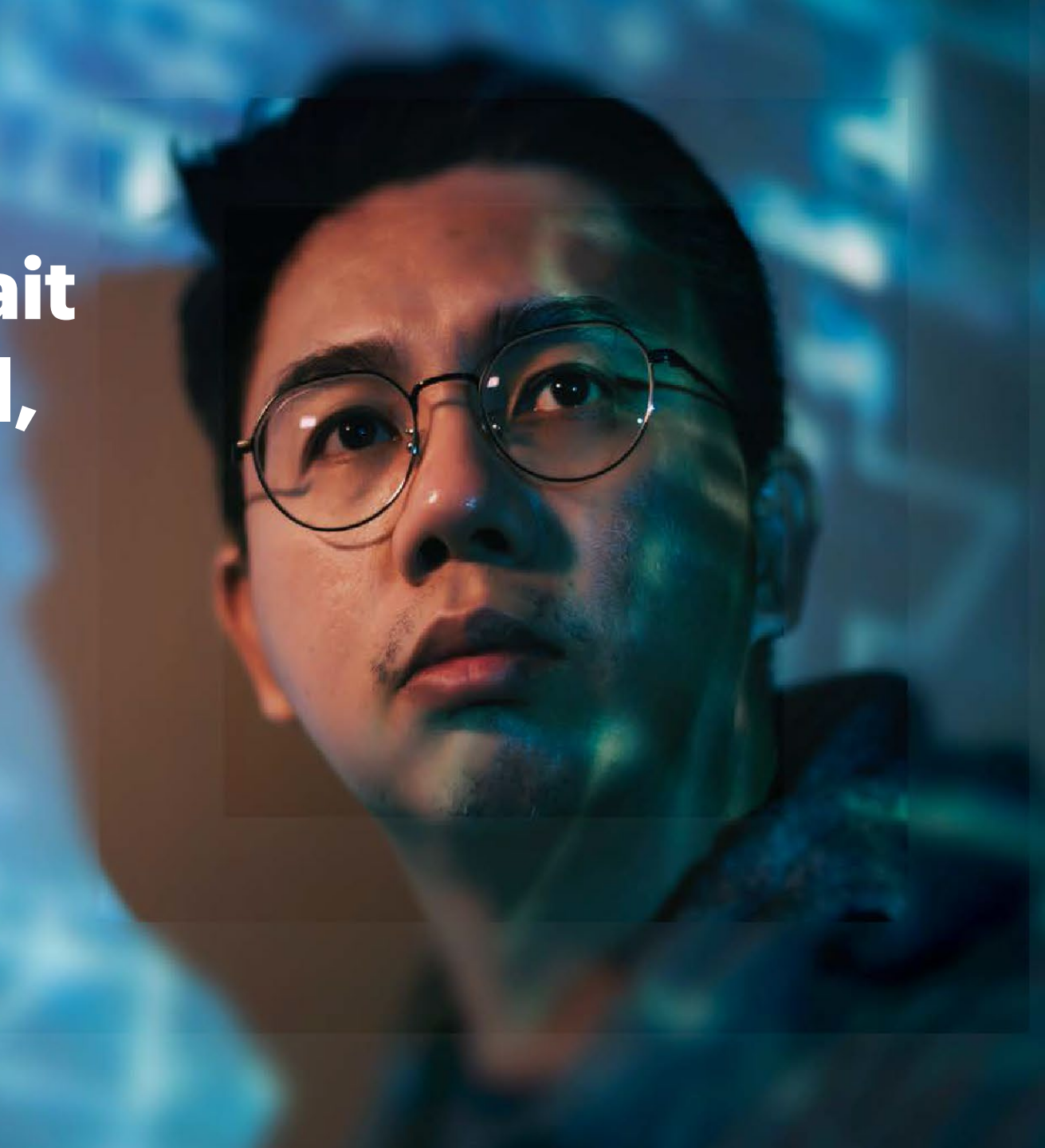
of executives report that their organization is innovating with an urgency and call to action this year.





# Leaders Don't Wait for a New Normal, They Build It

As the saying goes: The best way to predict the future is to invent it. Prioritizing technology is essential to ensuring the enterprise doesn't fall behind. However, true leadership will come from companies embracing radically different mindsets and models. The world has been beset by sweeping change and demands leadership that thinks boldly in response.



## Thriving in this moment will require ambitious leaders not content to rehabilitate the business to what it was, but willing to upend convention and wield their vision for the future.

From the workforce, to supply chains, to technology, operating, and business models, leaders have spent decades building systems for static purposes, where change happened slowly and expectedly. But today success is coming to those with the audacity to reimagine it all.

In the last year enterprises were forced to confront deep-seated assumptions about how fast the organization can pivot, where or how work gets done, even what they sell and to whom. While some froze, watching their old convictions crumble, others shattered the bureaucracies and assumptions holding them back—becoming the leaders that everyone will follow. The Red Roof hotel chain took reduced demand for travel, but an increase in remote work, as an opportunity to book rooms as daily workspaces.<sup>14</sup> As more companies start to see a return to the office as an option, not an inevitability, Red Roof has positioned itself as a challenger in

the coworking market. And as advertising spending globally began to drop, Spotify saw the threat posed to its ad-supported business model.<sup>15</sup> The company quickly took steps to begin buying and developing premium content to drive up paid subscriptions—a strategic shift that moved them from licensing and aggregation to production and trendsetting.

In isolation this looks like enterprises temporarily responding to crisis, but their willingness to challenge the core value proposition of the enterprise is setting a new standard for the future. While many companies are still waiting for the new normal to emerge before them—others are already building it.

Before the pandemic, if you asked an executive how long it would take to deploy a new communications platform across the company, doing it in less than a year would feel like a stretch. But in March 2020 the United Kingdom's National



Health Service dispelled perceptions of just how fast technology transformation needs to take. In a matter of weeks, they rolled out Microsoft Teams to 1.2 million employees.<sup>16</sup>

If you had asked a manufacturer what it would take to pivot from producing cars to medical equipment, they likely would have argued it was nearly impossible. But when the UK faced a critical shortage of ventilators, Rolls-Royce demonstrated the true capacity enterprises have for change. The luxury car manufacturer redesigned its entire supply chain to begin producing this desperately needed medical device.<sup>17</sup> Within five weeks, the company had secured the new parts needed from across 100 different suppliers, orchestrated operations across three sites, and production was underway.

When push comes to shove, leaders don't see change as disruption—they embrace it as an opportunity to build something new. But bold actions will fall flat without the technology foundation needed to support their ambition. Enterprises that pair big ideas with powerful technology will turn change-readiness into a competitive competency, not a reluctant accommodation.

For example, as the Geisinger Health System learned more about the COVID-19 pandemic, it prioritized accelerated investments in API modernization and microservices architecture.<sup>18</sup> With the agility and scalability it gained, the company was able to seamlessly move from supporting 27 remote visits a day to more than 1,000; double its remote workforce to 13,000 employees; and build a digital screening system and companion dashboard that allowed administrators to view patient population data in real time, reduce waits and crowding, and ensure safe social distancing protocols.

There is a temporary vacuum as people, employees, customers, and partners all continue to establish a new set of preferences for the next normal. Boundless opportunity lies ahead for the enterprises willing to break from the mentality of “that’s how we’ve always done it” and become part of crafting what comes next. This could be reinventing the customer experience in your industry, reimagining how data flows across the enterprise and its partners, or fostering the advantages of a virtualized workforce—even when social distancing is no longer a necessity.

But the wide-open opportunity also means competition has never been fiercer. Every company, from start-ups to traditional competitors, is facing those same disruptions, and introducing their own vision of the future all at once. It's not enough to keep pace anymore—to lead, enterprises must become pioneers.

83%

of executives agree that their organization's business and technology strategies are becoming inseparable—even indistinguishable.





# Broaden the Horizons of Leadership

Technology makes the boldest ambitions achievable, but people are the north star that provide vision and direction. As they pioneer the new normal, enterprises are poised to have an outsized impact on the world around them—and financial success will only be one measure of leadership.





## **There is a unique moment to rebuild the world better than it was before the pandemic, and realizing that goal will mean expanding our definition of value to include how well people thrive, the impact left on the environment, growing inclusivity, and more.**

When technology, ambition, and a commitment to people converge, the impossible becomes attainable. Early in the pandemic it was clear that many workforces were going to be stuck in limbo. Some industries, like airlines and hospitality, suddenly had next to no customers and a surplus of talented employees. Other areas, like technology and customer service, had surging demand and existing staff couldn't keep up. To respond to this imbalance, the chief human resources officers from Accenture, Lincoln Financial Group, ServiceNow, and Verizon jointly created a digital platform to connect workers with new roles.<sup>19</sup> The platform, called People + Work Connect, maps out employees available for work and roles that need to be filled, letting HR professionals from different companies collaboratively fill talent needs across their organizations and keep more people employed.

Even prior the pandemic other leaders have been widening their vision of who their stakeholders are and ingraining those commitments into the fabric of their business. For instance, Danone published its fiscal year-end results with a "carbon-adjusted" evolution to their earning per share to ensure environmental impact was included when assessing the company's profitability.<sup>20</sup> In light of protests that brought awareness to racial inequality, Walmart underwent an audit of its diversity and hiring practice, prioritized relationships with minority-owned suppliers, and committed \$100 million to establishing a center for racial equity.<sup>21</sup>

And with their accelerated digital transformations, enterprises can attack some of the deepest-set challenges the world faces. As efforts like sustainability and conscientious consumption become top initiatives, technology offers a foundation from which to achieve those goals.

Imagine buying a coffee and being able to see—and trust—its full production history. You could guarantee that sustainable material was used in the packaging, confirm the absence of allergens, be assured of ethical practices in production, and more. In the past, providing this level of visibility for any and every product would have seemed far-fetched. But emerging technology solutions are making it increasingly feasible, allowing companies to build trust with customers in unprecedented ways.

The circular supply chain, for instance, is a multiparty system (MPS) created in partnership with Mastercard, Amazon Web Services, Everledger, Mercy Corps, and Accenture. The cross-industry initiative combines blockchain-based data sharing, biometric identity verification, supply chain tracking and payment capabilities, to drive more inclusive, equitable and sustainable global supply chains.<sup>22</sup> By addressing problems of provenance, authenticity, and traceability, the system benefits the entire ecosystem and helps to realign incentives.

As companies lean more on the capabilities of technology, they need to recognize more than just the value it provides to the business. To lead with technology, they must measure its impact through a wider lens.





A background image featuring two women in profile, looking upwards. The scene is dimly lit with a blue and purple color palette. In the background, there are out-of-focus lights, creating a bokeh effect. The woman on the right is more prominent, with her face partially illuminated. The woman on the left is slightly behind and to the side. The overall mood is one of anticipation and looking towards the future.

# Our Moment is Now: 2021 Technology Trends

Companies are no longer strictly competing for market share; they are competing to build their vision of the future faster than the competition. Success will depend on their ability to accelerate and master change in all parts of their business, which in turn will be a direct function of the technology decisions they make today.

**But make no mistake, transforming the enterprise into a technology leader cannot be contained to the oversight of the CIO or CTO alone. To be successful, a digital-first approach must be fostered by the entire C-suite and manifested across all areas of the organization.**

Becoming a Master of Change begins with **architecting the future** and recognizing that business and technology strategies are increasingly indistinguishable. Architecture has never mattered more as the technology choices businesses make today will determine what the business can or cannot do long into the future. Competition is becoming a battle of technology stacks—and one size fits none.

As leaders thread technology through all aspects of the business, the valuable troves of data generated are being used to build massive networks of intelligent digital twins. The **Mirrored World** these next-generation twins create is fueling change by unlocking the currently trapped value of data and allowing enterprises to simulate, predict, and automate by seamlessly bridging the divide between digital and physical.

Enterprises must also ensure their people are empowered to become drivers of change—an outcome achievable through **technology democratization**, which is making powerful technology capabilities accessible without the need for specialized skills. Enterprises can ignite grassroots innovation by equipping every employee with the tools and skills to build technology solutions at the point of need.

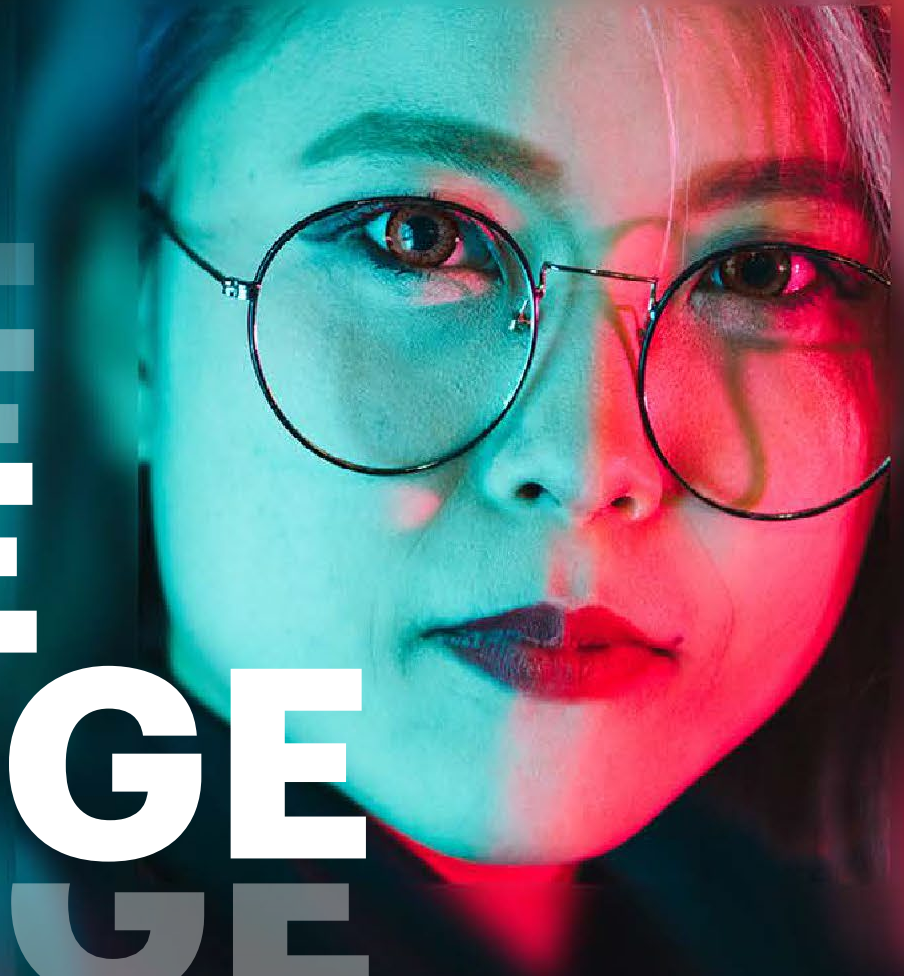
The enterprise can change from anywhere and everywhere as it equips the workforce to **bring your own environment**. The single biggest workforce shift in living memory is positioning businesses to explore the benefits of a virtualized workforce and expand the boundaries of the enterprise.

Finally, the challenges and opportunities ahead are vast and businesses will not be able to tackle them alone. **Multiparty systems** will help businesses lead by changing the way they partner. From supply chains to digital ecosystems, the pandemic showed just how brittle globe-spanning relationships can be. By rebuilding these partnerships with technology at the center, enterprises are finding ways to adapt together.

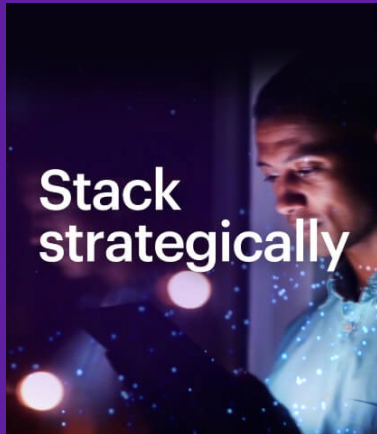
A new future is on the horizon—one that's different from what the world expected. As this future takes shape, there will be no room for enterprises that cling to the past. Will you watch the world change around you? Or be the one leading it? People are ready for something new and it's time for enterprises to join them. Let there be change.



LET THERE  
BE CHANGE



# Our five technology trends for 2021



Architecting a better future

[View Trend Deck](#)



The power of massive, intelligent, digital twins

[View Trend Deck](#)



The democratization of technology

[View Trend Deck](#)



Bring your own environment

[View Trend Deck](#)



A multiparty system's path through chaos

[View Trend Deck](#)

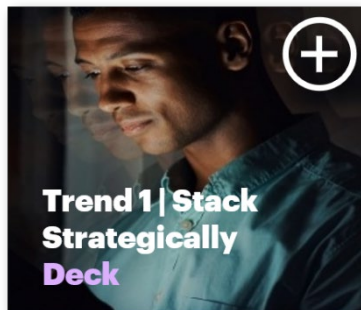


# Stack Strategically



## Architecting a Better Future

A new era of industry competition is dawning—one where companies compete on their architecture. Enterprises have a huge volume of technology options and varieties available to them. This means enterprises can custom-tailor every layer of their technology architecture, optimizing the execution of corporate strategy to a degree never seen before. But building and wielding the most competitive technology stack means thinking about technology differently. Business and technology strategies must become indistinguishable, and enterprises must strive to be technology leaders.



## Big Takeaways

The diversity of technology capabilities across the stack will lead to unprecedented diversity in business solutions. Enterprises that work to determine their most valuable combination of technologies will be able to develop truly one-of-a-kind offerings.

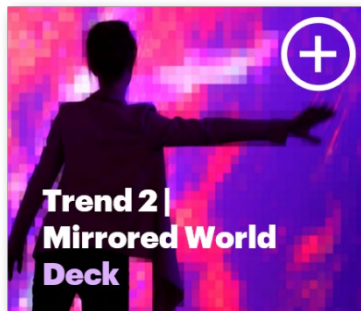
Building a competitive technology stack starts with accumulating technical wealth—cloud strategies and microservices are the key. Enterprises need an adaptive technology foundation, and they can't afford to be weighed down by legacy systems.

As enterprises merge their technology and business strategies, they will start to play a bigger role facilitating people's relationship with tech. This requires building trust—not just in products and services, but in the technologies behind them.

# Mirrored World

## The Power of Massive, Intelligent, Digital Twins

Growing investments in data, AI, and digital twin technologies are giving rise to a new generation of business and intelligence: The Mirrored World. Leaders are building intelligent digital twins all across their organizations and are weaving them together to create living models of whole factories, supply chains, product lifecycles, and more. As more of the physical world is represented in digital space, the burgeoning mirrored world will unlock a cornucopia of new opportunities. Enterprise leaders will be able to bring data and intelligence together at unprecedented scales; ask and answer big-picture questions critical to their survival; and reimagine how they operate, collaborate, and innovate.



## Big Takeaways

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Mirror-world simulations will give enterprises the freedom to explore new ideas and ask limitless “what-if” questions in a risk-free, digital environment. Leaders will use this capability to transform their innovation process.

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To reap the benefits of intelligent twins and the mirrored world, enterprises must build comprehensive and trusted data practices. Twins are a powerful way to turn data into actionable insights but using incomplete or bad data will do more harm than good.

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The mirrored world promises big-picture visibility, but accessing it means going beyond the enterprise’s four walls. Businesses must work toward a future of where intelligent twins enable seamless and data-driven collaborations across ecosystems.



# I, Technologist

## The Democratization of Technology

A shift is underway in technology development. Natural language processing, low-code platforms, robotic process automation, and more are democratizing technology, putting powerful capabilities into the hands of people all across the business. This phenomenon adds a grassroots layer to enterprises' innovation strategies—while IT will still handle major implementations and work with the most advanced technologies, the people closest to day-to-day business problems will be empowered to create technology-driven solutions themselves. With democratized technology, every employee can be an innovator, optimizing their work, fixing pain points, and keeping the business in lockstep with new and changing needs.



## Big Takeaways

Democratized technology can help close the skills gap. While highly technical skillsets remain in demand, leaders can use democratized technology to cultivate much of what they need within their current workforce.

To activate a grassroots layer of innovation, enterprises need to train their people to think like technologists. Training programs must cover how to use various democratized tools as well as overall technology literacy.

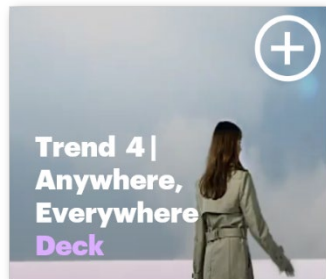
Democratization is breaking down traditional divisions between the technology and business sides of the organization. Leaders will need to rethink the roles of their IT and non-IT workers and reimagine how they collaborate.

# Anywhere, Everywhere



## Bring Your Own Environment

It's time for enterprises to transform remote work from an accommodation, to an advantage. During the height of the pandemic, enterprises ignited the biggest workforce shift in living memory by sending people home and doubling down on technology solutions to keep them productive. In doing so, they have made work possible not just from home, but from anywhere. Opportunities abound for the businesses ready to rethink what their organization looks like and what it can achieve with a virtualized workforce model. But simply extending pandemic policies won't be enough. Leaders must now develop "bring your own environment" (BYOE) strategies, addressing the security ramifications of remote work, necessary cultural shifts, and the evolving purpose of physical office space.



## Big Takeaways

During the pandemic enterprises focused on making BYOE work technologically possible, now they need to make it seamless and secure. Enterprises must address pain points today, or they will rapidly grow.

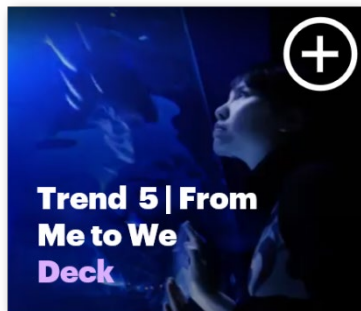
With a BYOE strategy comes the opportunity to reimagine the enterprise's operating models. From increasing human-robot collaboration to accessing a truly global talent pool, the potential benefits are vast.

As enterprises shift to a BYOE strategy, their culture must evolve too. This will be an ongoing process, but quick wins today include rethinking how employees communicate and working to ensure that remote and in-person employees are recognized equally.

# From Me to We

## A Multiparty System's Path Through Chaos

The global disruption of COVID-19 ignited a scramble for enterprises to reimagine their partnerships—and multiparty systems gained newfound attention. The sudden demand for contact tracing, frictionless payments, and new ways of building trust brought into sharp focus what had been left undone with enterprises' existing ecosystems. The next three years will see rapid change in customer needs, regulation, and more—and enterprises are learning they are stronger together. Enterprises have the opportunity to avoid rebuilding the same mistakes of the past and craft a new path forward. With multiparty systems, enterprises can gain greater resilience and adaptability; unlock new ways to approach the market; and set new, ecosystem-forward standards for their industries.



## Big Takeaways

To build greater resilience, enterprises must open themselves to more digitally led partnerships. This starts with investing in technologies like industry-focused clouds and thinking beyond traditional industry boundaries.

Multiparty systems are rapidly growing in adoption and have the power to radically transform partnerships. But enterprise leaders need to understand the right business case for leveraging them.

Multiparty systems are reshaping some of the most deeply set institutions. As enterprises pursue the advantages MPS provide, they must ensure they are using the technology to create a more equitable future.

# Completing the picture

Accenture's Technology Vision report comprises a three-year set of technology trends, currently including trends from 2020 and 2019.

It's important to recognize that each year's trends are part of a bigger picture. Tracking how they evolve over time offers a glimpse into how they may continue to grow in the future.

**2021  
Trends**



**2020  
Trends**



**2019  
Trends**





# 2020 Trends



## The I in Experience

Helping people choose their own adventure

Redesign digital experiences with new models that amplify personal agency. Turn passive audiences into active participants by transforming one-way experiences into true collaborations.

## AI and Me

Reimagine the business through human and AI collaboration

Take a new approach that uses artificial intelligence to bring out the full power of people. Move beyond deploying AI for automation alone and push into the new frontier of co-creation between people and machines.

## The Dilemma of Smart Things

Overcome the “beta burden”

Address the new reality of product ownership in the era of “forever beta.” Transform pain points into an opportunity to create an unprecedented level of business–customer partnership.

## Robots in the Wild

Growing the enterprise’s reach—and responsibility

Build new models of interaction and impact as robotics move beyond the walls of the enterprise. Companies in every industry will unlock new opportunities by introducing robots to the next frontier: the open world.

## Innovation DNA

Create an engine for continuous innovation

Tap into the unprecedented scale of disruptive technology available today. Build the capabilities and ecosystem partnerships necessary to assemble the organization’s unique innovation DNA.



# 2019 Trends

## DARQ Power

### Understanding the DNA of DARQ

New technologies are catalysts for change, offering businesses extraordinary new capabilities. Distributed ledger technology, artificial intelligence, extended reality, and quantum computing will be the next set of new technologies to spark a step change, letting businesses reimagine entire industries.

## Get to Know Me

### Unlock unique customers and unique opportunities

Technology-driven interactions are creating an expanding technology identity for every consumer. This living foundation of knowledge will be key to not only understanding the next generation of consumers, but also to delivering rich, individualized, experience-based relationships in the post-digital age.

## Human+ Worker

### Change the workplace or hinder the workforce

Workforces are becoming human+. Each individual is empowered by their skillsets and knowledge plus a new, constantly growing set of capabilities made possible through technology. Now, companies must adapt the technology strategies that successfully created this next-generation workforce to support a new way of working in the post-digital age.

## Secure US to Secure ME

### Enterprises are not victims, they're vectors

While ecosystem-driven business depends on interconnectedness, those connections increase companies' exposures to risks. Leading businesses are recognizing that just as they already collaborate with entire ecosystems to deliver best-in-class products, services and experiences, it's time security joins that effort as well.

## MyMarkets

### Meet consumers' needs at the speed of now

Technology is creating a world of intensely customized and on-demand experiences, and companies must reinvent their organizations to find and capture those opportunities as they come. That means viewing each opportunity as if it's an individual market—a momentary market.



# About the Technology Vision

**For more than 20 years, Accenture has developed the Technology Vision report as a systematic review across the enterprise landscape to identify emerging technology trends that will have the greatest impact on companies, government agencies and other organizations in the coming years. These trends have significant impact across industries and are actionable for businesses today.**

Accenture Labs and Accenture Research collaborate on the annual research process, which includes:

- Input from the Technology Vision External Advisory Board, a group of more than two dozen experienced individuals from the public and private sectors, academia, venture capital and entrepreneurial companies. In addition, the Technology Vision team conducts interviews with technology luminaries and industry experts, as well as nearly 100 Accenture business leaders from across the organization.
- A global survey of business and IT executives to understand their perspectives on the adoption and impact of technologies in their organizations. Survey responses help to identify the technology strategies and priority investments of companies from across industries and geographies.

As a shortlist of themes emerges from the research process, the Technology Vision team works to validate and refine the set of trends. The themes are weighed for their relevance to real-world business challenges. The Technology Vision team seeks ideas that transcend the well-known drivers of technological change, concentrating instead on the themes that will soon start to appear on the C-level agendas of most enterprises.



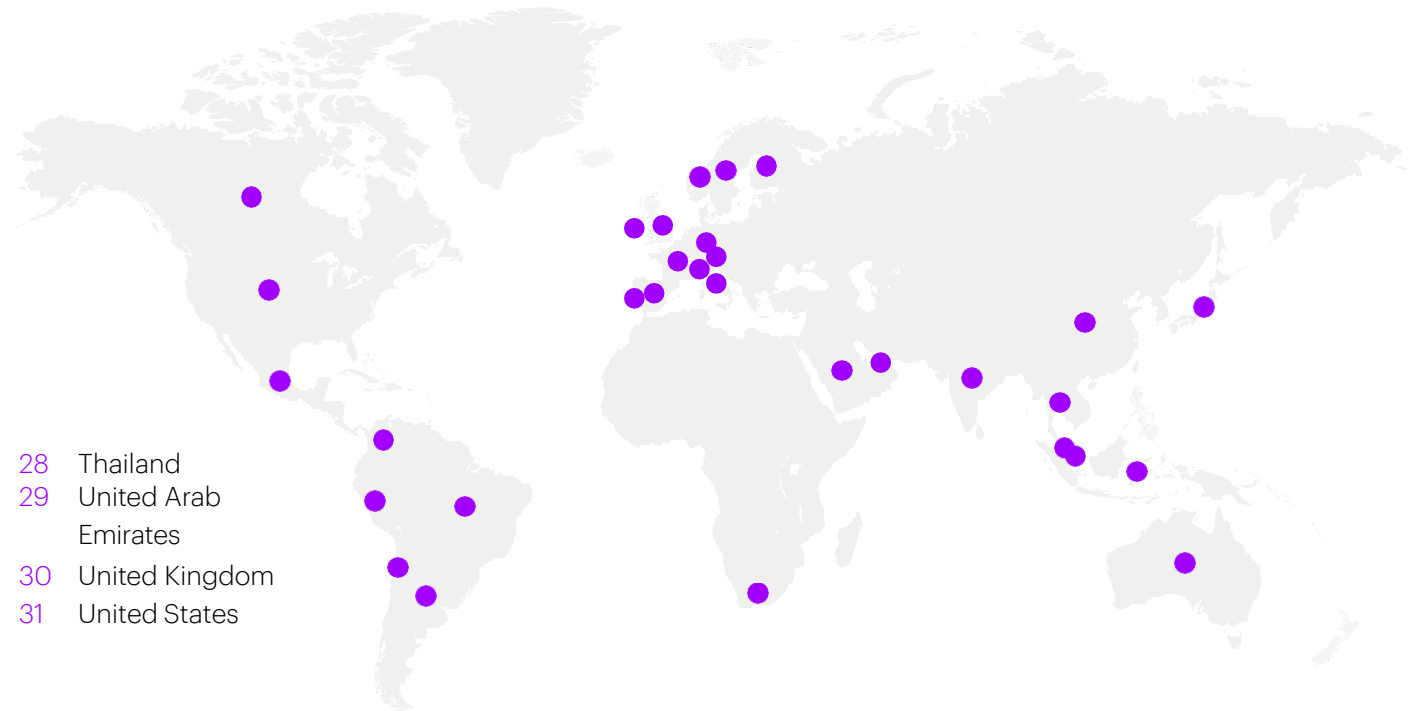
# Survey demographics

## Business survey

Accenture Research conducted a global survey of 6,241 business and IT executives to capture insights into the adoption and use of emerging technologies. The survey, fielded from December 2020 through January 2021, helped identify the key issues and priorities for technology adoption and investment. Respondents were C-level executives and directors at companies across 31 countries and 14 industries.

## 31 Countries

1	Argentina	10	France	19	Norway	28	Thailand
2	Australia	11	Germany	20	Peru	29	United Arab
3	Austria	12	India	21	Portugal		Emirates
4	Brazil	13	Indonesia	22	Saudi Arabia	30	United Kingdom
5	Canada	14	Ireland	23	Singapore	31	United States
6	Chile	15	Italy	24	South Africa		
7	China	16	Japan	25	Spain		
8	Colombia	17	Malaysia	26	Sweden		
9	Finland	18	Mexico	27	Switzerland		



## 14 Industries

2%

Aerospace and Defense

2%

Automotive

11%

Banking

9%

Communications

10%

Consumer Goods and Services

6%

Health

9%

Industrial Equipment

9%

Insurance

20%

Public Service

10%

Retail

1%

Semiconductors

3%

Software and Platforms

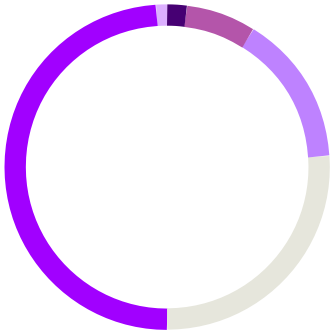
7%

Utilities

1%

Other

## Revenues



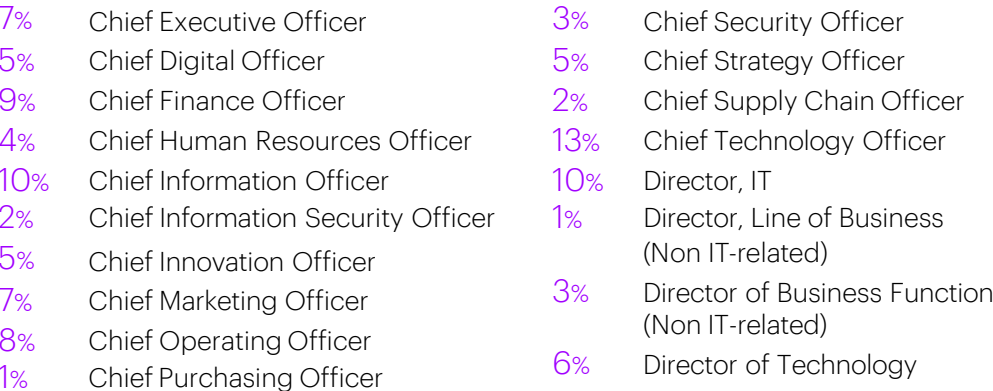
## Roles

52%

Business Executives

48%

IT Executives



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