

Accenture Technology Vision 2015

# Digital Business Era: Stretch Your Boundaries

**AN AUSTRALIAN PERSPECTIVE**

A large, stylized orange arrow pointing to the right, composed of two parallel lines that taper towards the tip.

High performance. Delivered.



## Introduction

Over the last few years, many Australian organisations have embraced social, mobile, analytics and cloud (SMAC) to transform themselves into digital businesses. Now these enterprises need to consider how they can take their new digital capabilities to the next level.

If Australian organisations are to grow and innovate at pace with their global peers, they must act quickly, stretching their digital boundaries by forging new connections and embracing emerging technologies that enable them to compete in the growing digital ecosystem.



Becoming a truly digital business is a massive undertaking. Two years ago, the Accenture Technology Vision forecast the pervasive need for every business to become a digital business. We saw technology begin to take its place as a primary driver of profitability and market differentiation in every industry.

Last year at Accenture, we began to see the industry leaders embrace this transformation and begin to reimagine their businesses for the digital era. The *Accenture Technology Vision 2014* declared that "Big is the Next Big Thing". We saw that the next logical step for large and often long-established companies was to start using technology not just as a way to improve their own internal processes, but also as a driving force for how they grow.

In Australia, we identified that larger and more established organisations that embraced digital could take advantage of their size, skills and scale to

pose a real threat to their smaller competitors. We predicted that these new 'digerati', with their deep resources, huge scale and process discipline, were about to rewrite much of the digital playbook.

Today, we see pioneering enterprises, both locally and globally, beginning to do just that. But many are doing far more than just flexing their digital muscles – they are fundamentally changing the way they look at themselves and quickly mastering the shift from 'me' to 'we'. They are stretching their boundaries by tapping into a broad array of other digital businesses, digital customers and even digital objects at the edges of their networks.

Leaders who are eager to drive change are using this broader digital ecosystem to place bets on a grand scale. These forward thinking companies are looking to shape entire markets and change the way we work and live.

## Succeeding in the 'We Economy'

The digital era makes big bets possible as well as increasingly necessary. The Internet of Things (IoT) is becoming a force that is driving new innovation and new opportunities by bringing every object, consumer, and activity into the digital realm. At the same time, leading businesses are making similar changes within their enterprises by digitising every employee, process, product, and service.

Taken in aggregate, enterprises find themselves connected to a digital fabric that has the potential to touch all aspects of their business, their customer relationships and the world around them. Already, this fabric has provided enterprises with an ability to connect and scale up in unprecedented ways. Companies routinely deal with hundreds of business processes, thousands of employees and millions of consumers. Many large companies are at a scale where they touch billions of lives.

However, more and more companies are beginning to see that these connections are not limited to just their employees and customers. Australian companies have the opportunity to tie themselves into a global network of businesses, individuals and objects from every industry around the world. This grand network of connections and its transformational power introduce a new era in the digital age – the age of 'digital ecosystems'.

## Redefining boundaries

Pioneering companies have already realised the implications of tapping into a digital ecosystem. They see that in such digitally driven, hyper-connected times, they have the capacity for action beyond transforming themselves into digital businesses. Businesses can and will gain huge efficiencies as they continue to master digital technologies internally.

However, visionary companies are recognising that as every business becomes a digital business, together they can effect change on a much bigger stage. By collaborating, they can shape experiences – and outcomes – in ways never before possible.

This is highlighted best in the rapidly growing industrial IoT. Here, companies are using fresh connections to offer new services, reshape experiences and create digital ecosystems to access new markets. Overseas, Home Depot, for example, seeks to shape the way people live by investing in an emerging connected home market. The company is working with manufacturers to make sure all of the connected home products it sells are compatible with smart home software provider Wink's connected home system. In doing so, Home Depot is creating its own connected home ecosystem, with a wide range of services that are easy to install.<sup>1</sup>

Philips is taking a similar approach. No longer is its healthcare practice just a producer of medical equipment; Philips is teaming up with Salesforce.com to build a platform that it believes will reshape and optimise the way healthcare is delivered. The envisioned platform will create an ecosystem of developers building healthcare applications to enable collaboration and workflow between doctors and patients across the entire spectrum of care, from self-care and prevention, to diagnosis and treatment, through to recovery and wellness.<sup>2</sup>

Philips sees an enormous opportunity to improve patient health by integrating data from multiple sources worldwide and enhancing the decision-making capability of medical professionals, while increasing the active engagement of patients in their own treatment. The ecosystem Philips orchestrates to achieve these improved outcomes is vast; it includes electronic medical records and diagnostic and treatment information obtained through Philips' imaging

equipment, monitoring equipment, and personal devices and technologies such as Apple's HealthKit.

Home Depot, Philips and many other companies globally are making big bets on huge opportunities that have the potential to bring about change on a global scale. By tapping into digital ecosystems, these companies have the ability to realise ambitions that transcend any single business or industry. Such pioneers see great potential to make a difference – and a profit – by operating as ecosystems, not just as individual corporate entities. By mastering the shift from 'me' to 'we', these leading enterprises are shaping a new economy – the 'We Economy'.

## Fresh opportunities

Ordinary businesses can now tackle challenges that were previously well beyond their scope: an opportunity to help design and create smart megacities of the future; a chance to radically rethink centuries-old modes of transportation; the ability



to raise the quality of healthcare by tackling it holistically across many industries, from hospitals to insurance and apparel. These are the types of epic opportunities that excite customers, inspire employees, galvanise long-term suppliers and present the opportunity of big rewards to investors.

The new power brokers will be the master orchestrators that place themselves at the centre of these digital ecosystems. These leaders will quickly master new digital relationships with their customers, end users, suppliers, alliance partners, developers, data sources, makers of smart devices, and sources of specialty talent. All will share the same goals: to grow new markets and to grow their individual businesses.

None of this will be easy, but the effort has the potential for tremendous rewards. The new age of the digital ecosystem isn't only about changing an individual company; it's about shaping entire markets. Each enterprise will determine its own fortunes – and that's an opportunity that no company will want to miss.

## The next step for Australian organisations

*Accenture Technology Vision 2015: An Australian Perspective* highlights key research and local examples for each of this year's Technology Vision trends, revealing the rate of adoption and maturity of Australian organisations in this digital era.

Locally, we are just starting to test the waters – we are beginning to understand how these trends affect the Australian marketplace and could help us grow and innovate. In comparison, many of our global peers have moved beyond experimentation to fully embrace the digital ecosystem.

To remain competitive, Australian organisations need to pursue opportunities and stretch their digital boundaries by creating new connections within the digital ecosystem, both locally and globally. Those that fail to bridge these divides risk being left behind in the constantly evolving 'We Economy'.

## 2015 Vision Trends:

### Hallmarks of tomorrow's digital business leaders

Technology is moving at a breakneck pace. Social, mobile, analytics, cloud, and increasingly the IoT, have become driving forces behind the rapid evolution of digital businesses. This year's Accenture Technology Vision highlights five emerging themes that reflect significant shifts among the leading digital power brokers. The report also explores the varying maturity levels of Australian organisations in the evolving digital ecosystem.

## TREND 1

# The Internet of Me: Our world, personalised.



The 'Internet of Me' is changing the way people around the world interact through technology, placing the end user at the centre of every digital experience.

As everyday objects become increasingly connected, more and more user experiences take place online. This creates an abundance of digital channels that have the potential to affect every aspect of people's lives. Forward-thinking businesses are changing the ways they build applications, products and services to create new and highly personalised experiences that engage and exhilarate consumers, without breaching their trust.

The Internet of Me may be in its infancy in Australia. Regardless, the Accenture Technology Vision research shows more than three quarters of local organisations hold personalised experiences for customers among their top three priorities, while 39 per cent report it's their top priority, on par with the global trend.

Many local organisations are already experimenting with personalised technology to rework products, services and processes. For example, Australia's Coca-Cola Amatil retrofitted vending machines with touchscreens, video cameras and Kinect technology to create a fresh, personalised vending experience.<sup>3</sup>

Wearables company We:eX and Foxtel recently partnered to produce the Alert Shirt – a jersey that creates a unique, personalised experience by using live sports data to relay sensations that simulate the experience of being in the stadium for fans watching at home.<sup>4</sup>

The Victorian Government, electricity businesses and consumer groups recently rolled out energy smart meters across Victoria. The meters enable consumers to make informed choices about energy consumption with accurate, real-time usage data.<sup>5</sup>



78% of Australian organisations hold personalised experiences among their top three priorities, while 39% report it's their top priority, on par with the global trend.

53% of Australian organisations are seeing a return on investment from personalisation technologies compared with 60% of global respondents.\*

However, the research also shows that fewer businesses in Australia are yet to see a return on investment (ROI) from personalisation compared with their global counterparts. This suggests local organisations still have unrealised opportunities to align technology with business outcomes.

While the retail industry in Australia is a 'digital laggard' according to the Accenture Digital Density Index<sup>6</sup>, local businesses can look abroad for examples of how retailers are using digital to improve ROI.

For example, Macy's department store is personalising its traditional bricks-and-mortar experience by using iBeacons to send push notifications to in-store shoppers. The alerts use data from Shopkick, an app that lets shoppers browse, 'favourite', and discover new items from the Macy's catalogue.

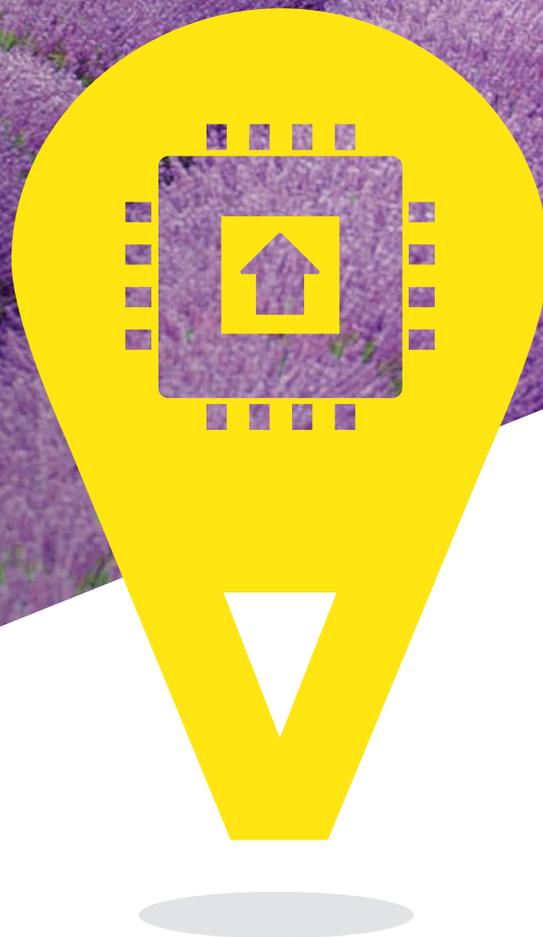
The messages instantly notify shoppers which of their favourites are available in-store, and offer customised discounts on those items.<sup>7</sup>

In a world where every object offers a new set of conversations with consumers, enterprises need to work hard to place the customer at the heart of all business decisions. The organisations that create the richest experiences for customers will become the household names of the future.

## TREND 2

# Outcome Economy:

Hardware producing hard results.



Intelligent hardware is bridging the last mile between the digital enterprise and the physical world.

Enterprises are beginning to leverage the opportunities that the IoT can deliver by embedding intelligent hardware and sensors into their products and services. These connected objects and digital devices provide unprecedented insight into customers' usage habits and interests. From intelligent hardware in vehicles and home appliances to wearable devices and sensors in farming equipment, today's technologies give organisations the information they need to create more personalised experiences for their customers and deliver better outcomes. In the process, these technologies are enabling a new business model that shifts the focus from selling things to selling results.

We call this the 'Outcome Economy'.

Our research shows that, compared with respondents in other countries, more Australian executives expect organisations to use data from intelligent hardware to dynamically tailor responses to situations within the next three years. Already, 30 per cent are using sensor data to monitor conditions and react to situations – the highest incidence of all countries surveyed.

In the local health industry, the Commonwealth Scientific and Industrial Research Organisation (CSIRO) is using a network of home sensors in aged care to track patients' movements, collect critical health information and alert carers to emergencies. This technology could enhance the quality of life for elderly Australians, allowing them to live in their homes for longer while still being monitored and supported by aged care providers.<sup>8</sup>



88% of respondents in Australia believe organisations will increasingly shift from selling products or services to selling outcomes.

34% expect their organisations will be using sensor data to interact with the world in the next three years.\*

Autonomous vehicles are another example of the Outcome Economy. They promise to deliver safer roads, reduced environmental effects, more compelling products and applications for consumers, and fresh revenue streams for companies.<sup>9</sup>

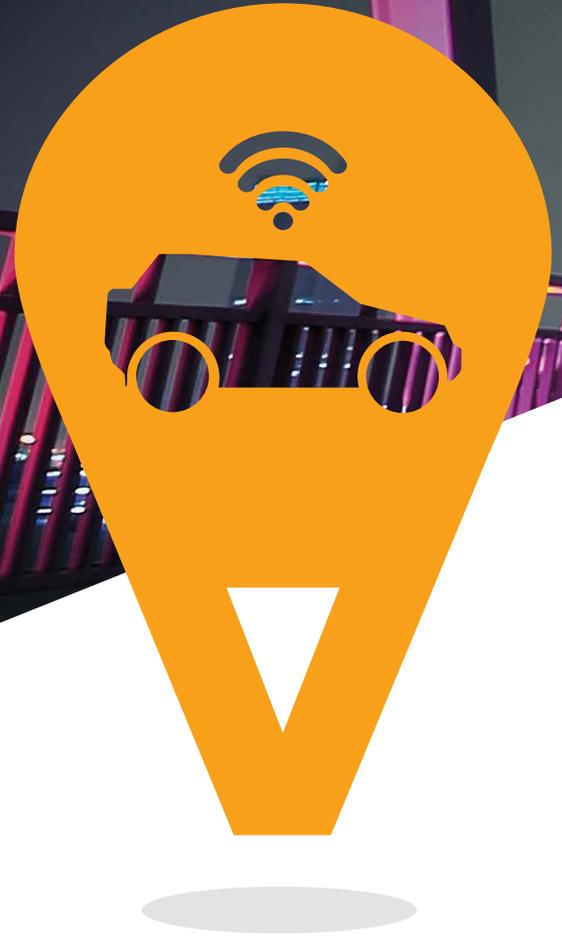
Our research shows that Australians are ahead of the global average in both using and experimenting with connected cars. For example, the NSW Centre for Road Safety has created a smart hardware safety system as part of the Cooperative Intelligent Transport Initiative that warns drivers about potential dangers in their immediate environment. The University of New South Wales is working with car-sharing service GoGet to tailor self-driving cars to the local market.<sup>10</sup>

Nearly nine in 10 Australian respondents to our research believe organisations will increasingly shift from selling products or services to selling outcomes. It is clear that many local businesses and industries are ready to embrace the Outcome Economy.

## TREND 3

# The Platform (R)evolution:

Defining ecosystems,  
redefining industries.



The 'Platform (R)evolution' explores how digital platforms are becoming the tools of choice for building next-generation products and services – creating ecosystems that connect the digital and physical worlds. Across entire industries, these platforms are defining how organisations connect, deliver services, innovate and grow.

Rapid advances in cloud and mobility are eliminating technology and cost barriers and making platforms accessible to both established organisations and start-ups across industries and geographies. Over the last decade, companies such as Apple, Facebook and Salesforce.com have set the benchmarks for online platforms. Now, established enterprises from outside the technology industry are launching major strategic initiatives to become platform-based businesses themselves.

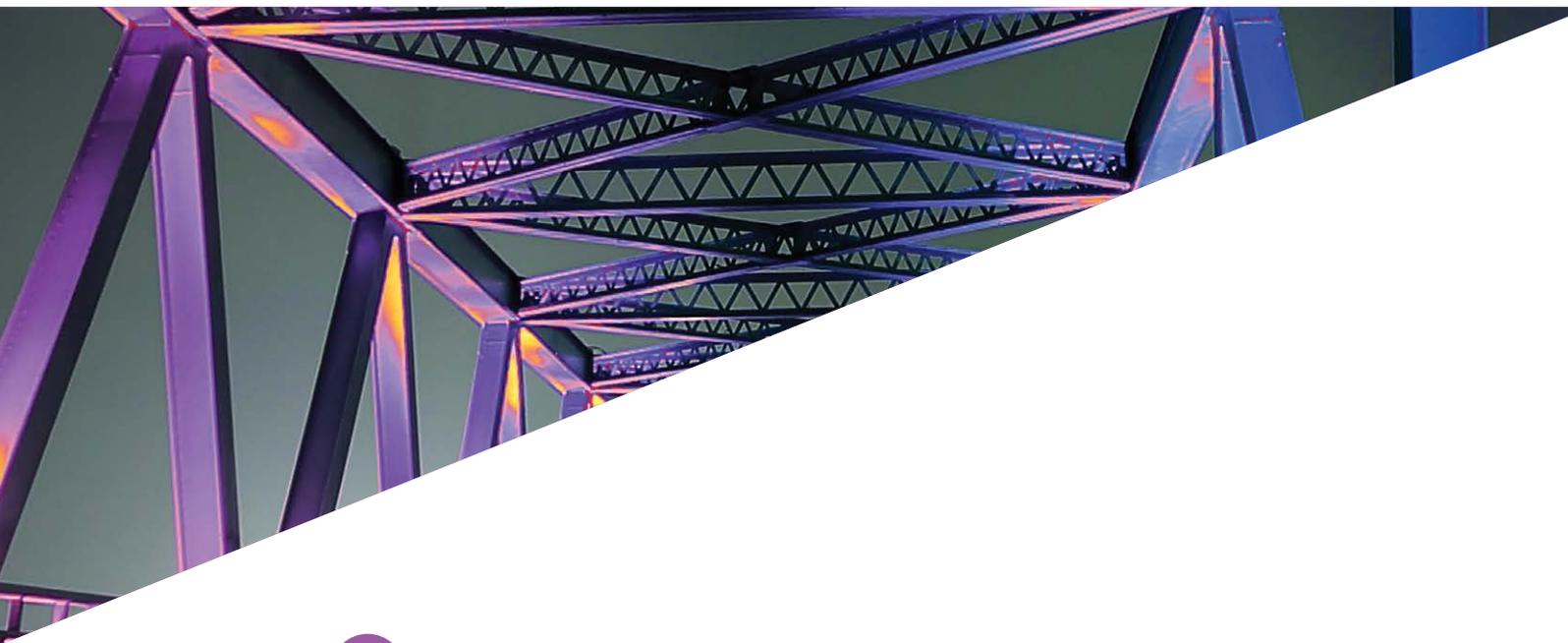
For example, Property Exchange Australia provides a national digital conveyancing platform. It allows users

across the property industry to share documentation and data required for property transactions online in a secure cloud-based platform, reducing IT costs and operational risk in the process.<sup>11</sup>

Start-up company Workible provides a mobile and social recruitment platform for the service and supply industries. It presents clients with a mobile and web application that uses mobile technology and social networks to connect employers with appropriate jobseekers in real-time.<sup>12</sup>

Australian organisations seeking to capitalise on platforms need to look abroad and outside their industries to see how businesses are taking platform innovation to the next level.

For example, Fiat is investigating connected cars as a growth opportunity. Partnering with companies such as TomTom, Reuters, Facebook and Tuneln, the manufacturer is creating its own Uconnect platform



68% of Australian respondents agree that industry players rather than technology companies will lead industry platform development.\*

that will offer communication, entertainment and navigation features designed to help drivers stay focused on driving.<sup>13</sup>

In the ecosystem-driven market, successful organisations will be those that have reconsidered their business services and technology and transformed them into digital platforms. These businesses will need to embrace Platforms-as-a-Service (PaaS), open innovation and application programming interfaces (APIs) to be able to collaborate with digital partners and create customised experiences for the end user.

Our Technology Vision research shows that Australian organisations are behind the global average in the use of such emerging technologies. Many are still in the experimentation phase and are planning adoption over the next two years.

Most Australian respondents to our research also agree that industry players rather than technology companies will lead industry platform development. However, many Australian businesses fail to explore new digital initiatives by forging connections with digital business partners within and outside their industries.

Australian organisations must explore the broader digital ecosystem, create new digital connections and identify services that complement their own to realise the growth opportunities of the Platform (R)evolution. They need to act quickly to move beyond experimentation – or risk being left behind.

## TREND 4

# Intelligent Enterprise:

Huge data, smarter systems  
– better business.



The 'Intelligent Enterprise' is making its machines smarter, embedding software intelligence into every aspect of its business.

In the past, businesses used software to help employees make better and faster decisions. Advances in software intelligence now allow businesses to defer many decision-making processes to machines, enabling more efficient operations, rapid innovation and effective customer service.

Coupled with the exponential growth of data and advances in big data analytics, connected devices and processing power, intelligent software will enable the next generation of software services and allow tomorrow's organisations to realise new levels of operational excellence.

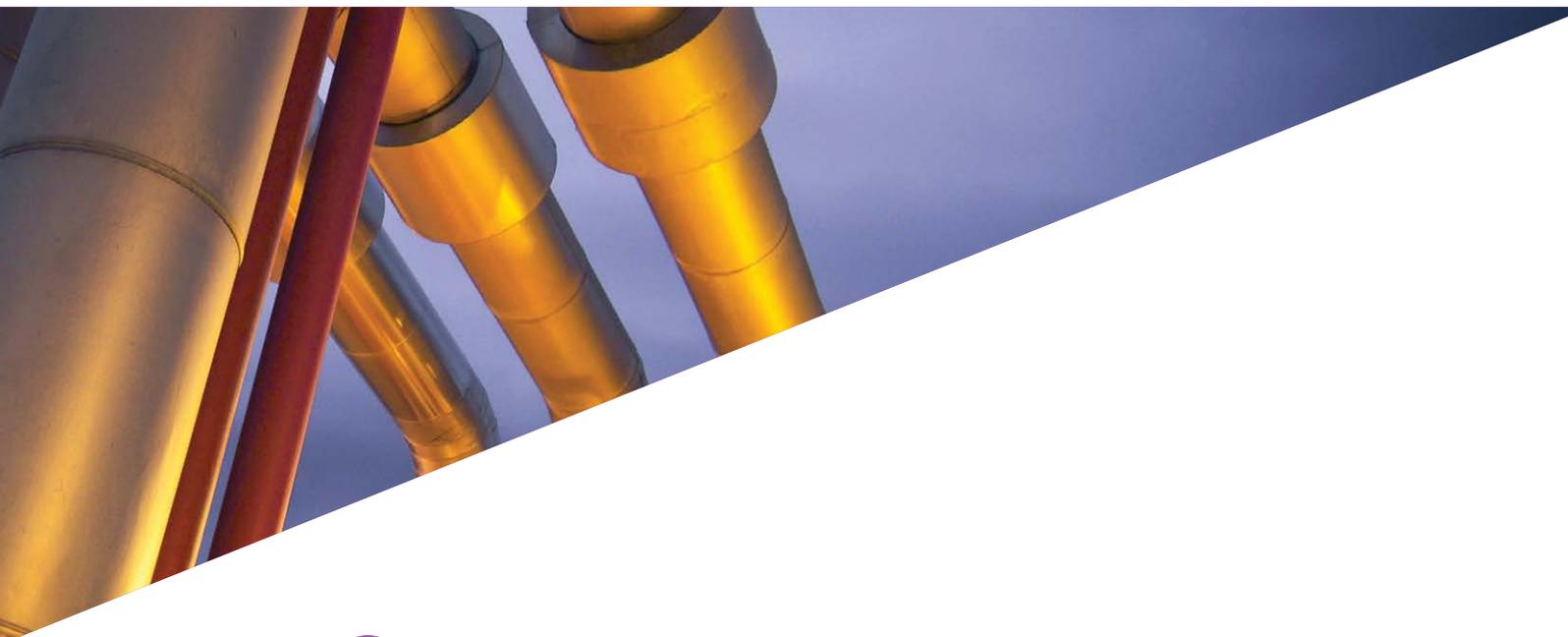
This year's *Accenture Technology Vision* maps this transformation along an intelligent software maturity curve. Our research shows that local enterprises lag

behind the global average in the use of analytics, but are experimenting at different levels along the curve.

In the first stage of this curve, smart organisations use rule-based algorithms and analytic insights to automate core processes. Our 2015 research reveals that 79 per cent of Australian organisations are either using or experimenting with rule-based algorithms.

The second stage is machine learning, which enables organisations to deploy decision algorithms capable of processing massive amounts of data and learning from outcomes to solve future problems more efficiently. Our research shows that 28 per cent of Australian organisations surveyed have started using analytics at this level, while 45 per cent are experimenting. Australia's use of predictive analytics is at a similar level to the global average.

For example, Telstra is using predictive analytics to understand its customers better and make more



## 89% of Australian respondents believe that software intelligence will be critical to maintaining relevance and streamlining IT.\*

effective marketing decisions.<sup>14</sup> Rio Tinto is using predictive mathematics, machine learning and advanced modelling to predict and prevent engine breakdowns and other downtime events, significantly boosting productivity and safety in its Mine of the Future™.<sup>15</sup>

The third stage of the maturity curve concerns cognitive computing. This software will perceive what's happening around it, analyse and understand the data it collects in real time, and take action based on informed decisions. While very few companies in Australia are using cognitive analytics, this advanced practice will become more prominent as technologies mature in the next two years.

Although this element of the trend is still in the early stages of adoption, many organisations around the world are taking steps to implement cognitive computing. For example, Accenture is undertaking

client pilot projects with IPsoft's cognitive computing software Amelia – a virtual assistant that can learn from natural language interactions to solve problems. In these trials, Amelia will help support clients' service delivery and will constantly improve on its abilities by learning from and observing conversations, documentation and service agents' live interactions.<sup>16</sup>

Overall, with data and digital complexity on the rise, 89 per cent of Australian respondents believe that software intelligence will be critical to maintaining relevance and streamlining IT. Business and technology leaders must now view software intelligence not as a pilot or a one-off project, but as an across-the-board functionality – one that will drive innovation and new levels of operating performance throughout the enterprise.

## TREND 5

# Workforce Reimagined:

Collaboration at the intersection of humans and machines.



The push to go digital has amplified the need for humans and machines to do more, together.

Advances in natural interfaces, wearable devices, and smart machines will present new opportunities for companies to empower their workers through technology. This will also surface new challenges in managing a collaborative workforce composed of both people and machines. Successful businesses will recognise the benefits of human talent and intelligent technology working side by side in collaboration—and they will embrace them both as critical members of the reimagined workforce.

Many Australian organisations appear to be embracing the blended workforce and are increasingly working with emerging technologies. Our research shows that Australia is above the global average in the use of drones for surveillance, sensor data to monitor conditions and react to situations and robotics to automate business processes.

For example, Rio Tinto is using driverless vehicles in the company's ore mine in the Pilbara in Western Australia to deliver loads more efficiently, minimising delays and fuel use. Operators control the vehicles remotely to exert more control over their environment and ensure greater operational safety.<sup>17</sup>

Baxter – a 'collaborative robot' – works uncaged alongside employees in Haigh's Chocolates' Adelaide factory, completing repetitive production tasks that used to be too difficult or expensive to automate, freeing up human operators to focus on jobs that add greater value.<sup>18</sup>

The Queensland Fire and Emergency Services uses unmanned aerial vehicles (UAVs) to fight bushfires. Queensland Police is moving towards the use of UAVs in response to disaster situations.<sup>19</sup>

These technologies are not only increasing productivity and efficiency, but are shaping how people collaborate



More than 21% of Australian business and IT executives are experimenting with or using intelligent technologies, including drones, robots and sensors.

78 % of respondents believe Australian companies will need to train their machines as much as they do their people, within three years.\*

with machines to complete tasks and changing the skills businesses need to operate. This shift creates new challenges for businesses. In the future, organisations will need to consider which tasks are best performed solely by humans or machines, and which benefit most from machine-human collaboration. These decisions will significantly influence processes, operations, roles and structures.

The pace of technology's evolution means that work practices and training requirements will change more rapidly and more frequently. Organisations will need to adopt new approaches to education that allow people to develop skills and learn continually throughout their working journey – both on the job and through formal training. This training also applies to machines, to ensure that businesses find the optimal balance in employee-technology collaboration. Our research shows that 78 per cent of respondents believe Australian companies will need to train their machines as much as they do their people, within three years.

These new skills will increasingly blend human knowledge and ability with that of machines and technology, enabling better outcomes. Employed separately, humans and machines won't be enough to drive businesses in the coming decades. Tomorrow's leading enterprises will be those that reimagine their workforce to effectively blend the two.

An aerial night photograph of a coastal resort and construction site. In the foreground, a large building with a helipad on its roof is illuminated. To the left, a golf course and swimming pools are visible. In the background, a large construction site with several cranes is situated on a peninsula in the water. The sky is dark blue, and the water is a deep blue.

## Summary

### Technology Vision 2015: An Australian Perspective.

This year's Accenture Technology Vision research shows that Australian organisations have different priorities than their global peers in the new digital era.

We have a more focused approach than global counterparts, ranking in the top three countries for investing in digital technologies in select business units. Our research shows that Australia is ahead of other countries in the use of smart devices for creating personalised experiences. Australian companies are also willing to invest in emerging technologies, such as drones, robotics and hardware sensors, to improve productivity and efficiency.

However, our research reveals that Australian organisations are lagging behind their global peers when it comes to investing in digital technology as part of their overall business strategy. Australian

businesses also regard the digital ecosystem with less urgency than their international counterparts.

Fewer local organisations are using analytics and intelligent software such as machine learning to improve business productivity. Australians are also less likely to be using emerging technologies such as PaaS solutions, open innovation and APIs to integrate applications and collaborate with business partners. Instead, many are still experimenting and plan to implement these technologies in the next two years.

And while Australian organisations acknowledge that platforms will reshape industries into interconnected ecosystems, many rely on traditional business partners and start-ups – rather than digital partners within and outside their industries – as sources of innovation and digital initiatives.

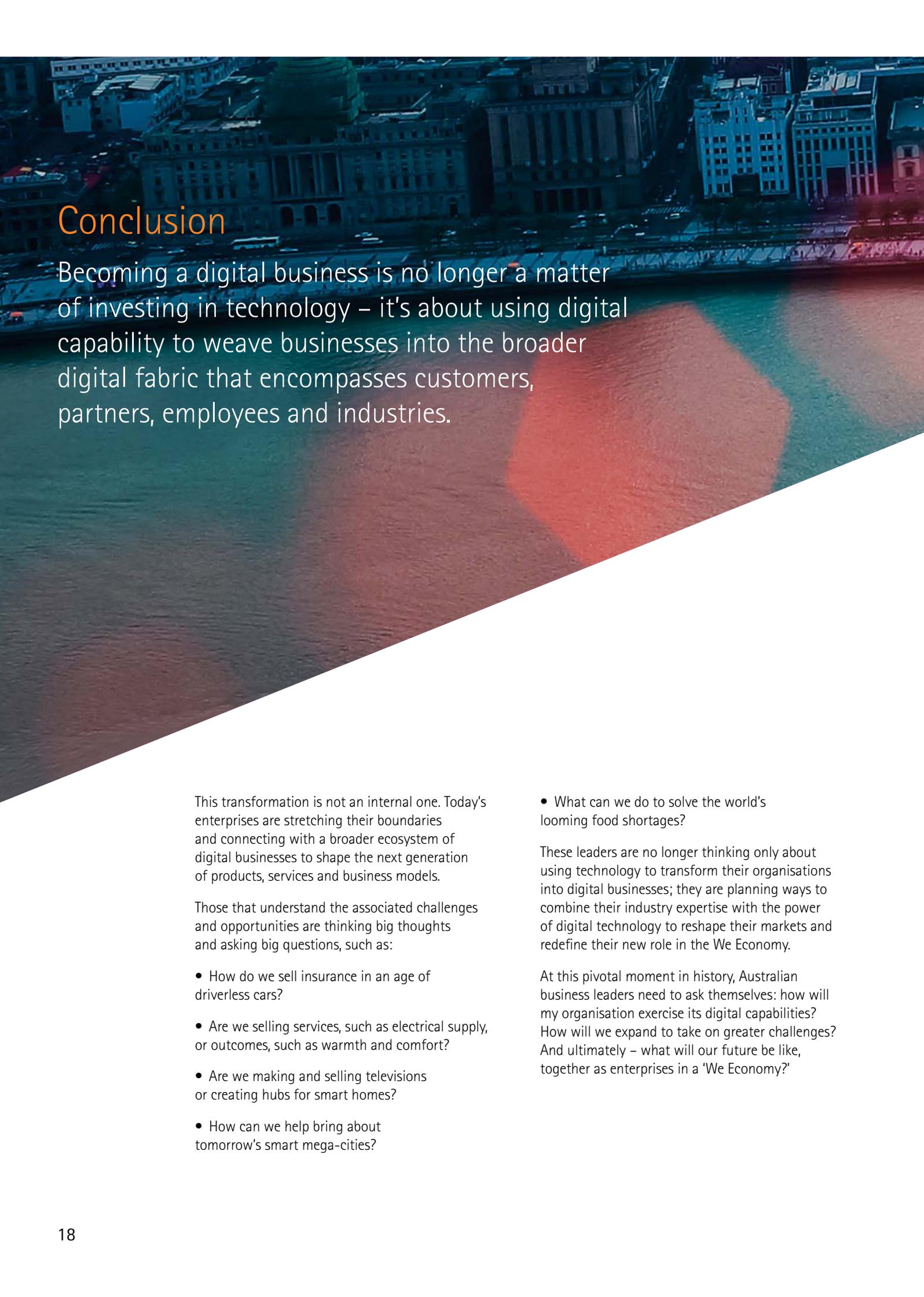


33% of Australian organisations are investing in digital technologies in select business units, compared with 27% of global respondents.

29% of Australian respondents are comprehensively investing in digital technologies as part of their overall business strategy, which is less than the global average of 35%.\*

Digital technologies continue to expose Australian organisations to new levels of global competition. Local enterprises need to understand the effect this will have on their industry and how digital technologies should be embedded in their overall business strategy to provide a competitive advantage.

The challenge for Australian organisations is to move beyond the experimentation phase and act quickly to seize opportunities in the We Economy. Businesses intent on success must expand their digital boundaries and explore new connections at the edges of their digital ecosystems to realise new paths for innovation and growth.



## Conclusion

Becoming a digital business is no longer a matter of investing in technology – it's about using digital capability to weave businesses into the broader digital fabric that encompasses customers, partners, employees and industries.

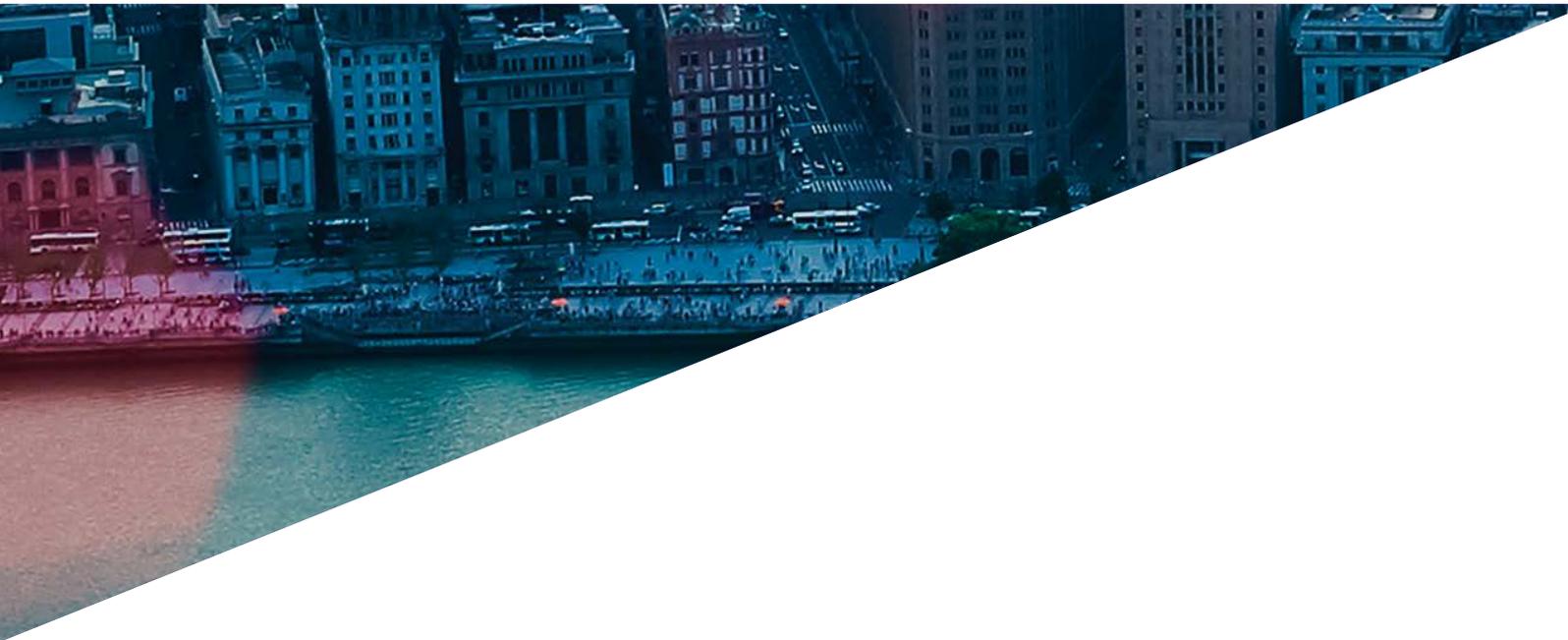
This transformation is not an internal one. Today's enterprises are stretching their boundaries and connecting with a broader ecosystem of digital businesses to shape the next generation of products, services and business models.

Those that understand the associated challenges and opportunities are thinking big thoughts and asking big questions, such as:

- How do we sell insurance in an age of driverless cars?
- Are we selling services, such as electrical supply, or outcomes, such as warmth and comfort?
- Are we making and selling televisions or creating hubs for smart homes?
- How can we help bring about tomorrow's smart mega-cities?
- What can we do to solve the world's looming food shortages?

These leaders are no longer thinking only about using technology to transform their organisations into digital businesses; they are planning ways to combine their industry expertise with the power of digital technology to reshape their markets and redefine their new role in the We Economy.

At this pivotal moment in history, Australian business leaders need to ask themselves: how will my organisation exercise its digital capabilities? How will we expand to take on greater challenges? And ultimately – what will our future be like, together as enterprises in a 'We Economy?'



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\*Accenture Technology Vision 2015 research – survey of 190 respondents from Australian based organisations.

## For more information

Email [ANZTech-Vision2015@accenture.com](mailto:ANZTech-Vision2015@accenture.com) to find out how your organisation can benefit from applying the five trends of Technology Vision 2015.

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