From survive to thrive

Building tomorrow's communications
on a modern digital core

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Introduction

Unresolved <mark>technical debt</mark> is a barrier to productivity and innovation for communications service providers (CSPs). After 10–15 years of mixed results following continuous but fragmented IT modernization in pursuit of technological competitive advantage, CSPs have built out new systems but are maintaining significant legacy footprints.

Over the years, CSPs approached IT transformation through adaptation as the business embraced new models, architectures and acquisitions. This approach multiplied the complexity of the IT components, which compounded tech debt. As a result, initiatives have not always yielded high-value returns and business outcomes. In Accenture's latest study — a survey of 250 top CSP executives — less than 7% of respondents were fully satisfied with the return on their IT modernization investments in the past three years.

CSPs need to rethink their approach to transformation. They need to decouple legacy systems and build the foundation for a <mark>digital core</mark> capitalizing on the new opportunities AI and digital tech offer. To lead with value, they will have to build modern enterprise architectures with joint portfolio planning of the business and technology units. By leveraging Generative AI (Gen AI) engineering efficiencies, they can fund and accelerate progress.

technical debt

Technical debt is the cost, in money and/or effort, required for a company to keep its IT systems up-to-date and capable of meeting business needs.

digital core

A digital core is how the world's leading organizations will build, apply, and integrate their technology estate to position them for success in the coming years. It comprises seven essential components of an enterprise technology estate – platforms, data, AI, integration, cloud, security, and IT operations – that can work together to reinvent a CSP's business and enable the continuous creation of new possibilities. Alongside, embracing a digital core mentality requires shifting this foundational technology's role from static, standalone parts to an intentionally integrated and prioritized whole, eliminating friction and allowing for sufficiently fast adoption of future technologies. This ensures that the full potential of new technologies such as generative AI is scaled and realized across the business.

The cost of delayed technology transformation

The negative impact of tech debt cascades across a CSP organization. It is not limited to the IT function, but also affects business outcomes. Our research shows that because of accumulated tech debt, companies:

60%

Fail to monetize their most valuable assets: 60% of executives highlighted the inability to monetize their networks as the top business drawback of legacy IT systems.

49%

of CSP executives cited that their business struggles to compete with lean new entrants on both price and agility due to high tech debt.
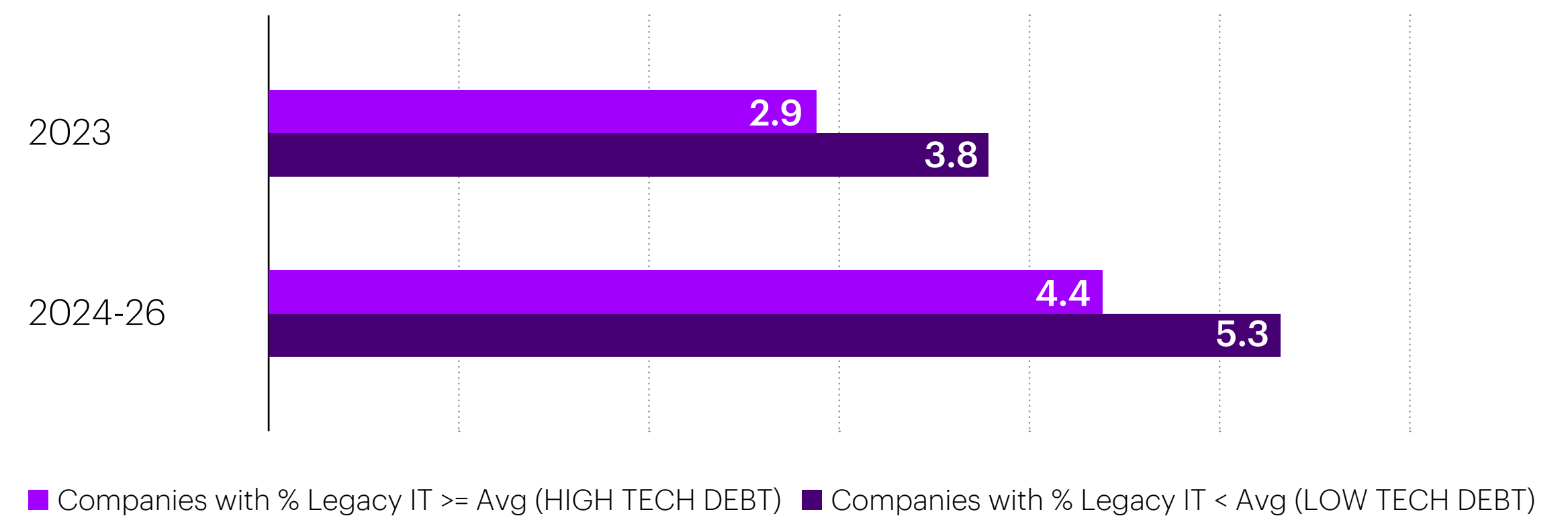
37%

Incur heavy expenses: 37% of CSP executives mentioned large IT maintenance and operational costs as well as slow and expensive new-service creation as the top issues arising from the high proportion of legacy in their IT infrastructure.

Note: The percentage refers to sum of top three ranked responses by the surveyed executives.

Overall, tech debt affects a CSP's agility, costs, competitiveness and, ultimately, its business growth.

On the other hand, as Figure 2 shows, companies with lower tech debt have historically performed better than their peers in revenue growth and expect better performance in the next three years. As expected, it is the opposite for companies with higher tech debt.

Figure 1. Average annual revenue change % vs. % of legacy in total IT costs in 2023 and 2024–26

2023: 2.9, 3.8
2024-26: 4.4, 5.3

■ Companies with % Legacy IT >= Avg (HIGH TECH DEBT)   ■ Companies with % Legacy IT < Avg (LOW TECH DEBT)

N=202

Source: Accenture CSP Technology Transformation Survey, November 2023.
Note: The average tech debt (i.e., % of legacy IT in total IT costs) in 2023 was 56% and is forecast to touch 37% in 2024-26.

The urgency to accelerate transformation: Moving from surviving to thriving

Our research shows that the financial and operational targets of CSPs around the world are steadily increasing year over year. Figure 2 presents a snapshot of the industry's rising business aspirations for revenue, efficiency, time to market and return on investments. Accelerating tech transformation is no longer a choice but an imperative to remain competitive in the market.

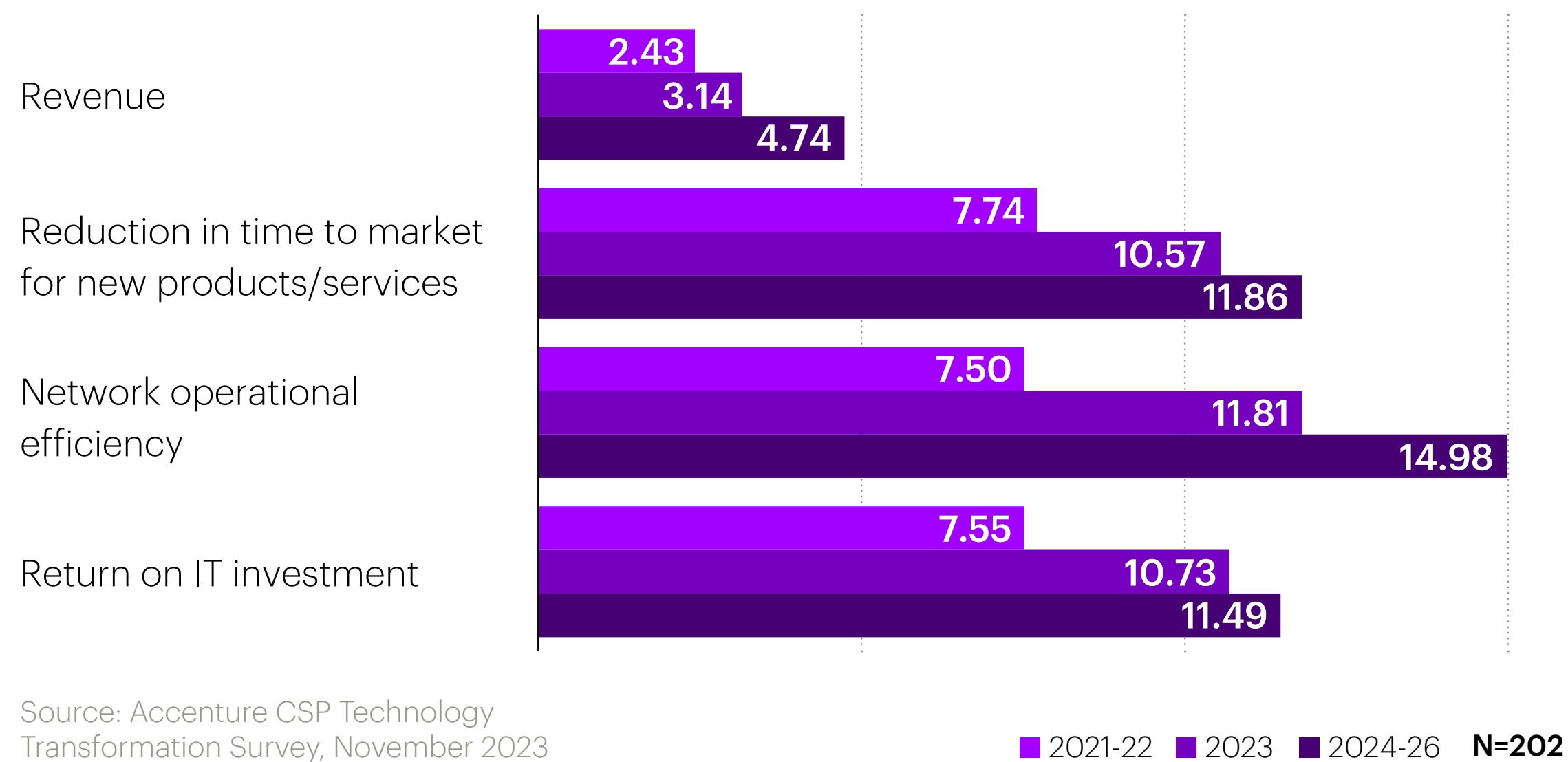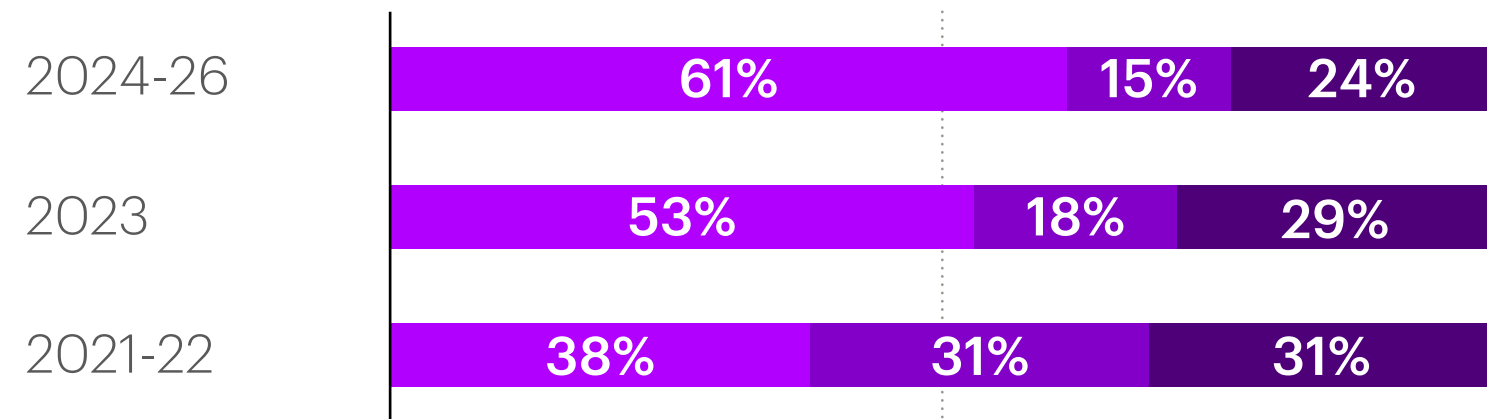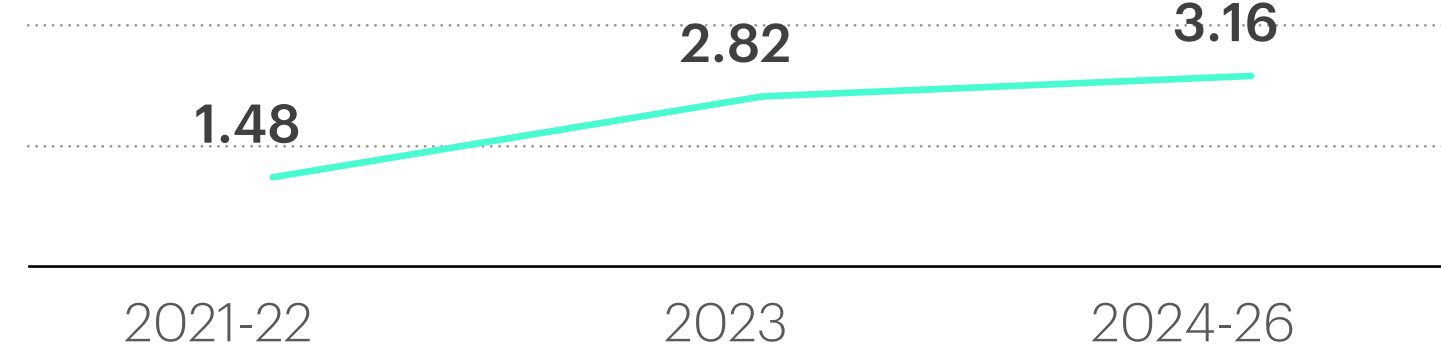**Figure 3.** Average annual % change in CSPs' business targets for past (2021–22 and 2023) and future periods (2024–26).

Revenue	2.43 / 3.14 / 4.74
Reduction in time to market for new products/services	7.74 / 10.57 / 11.86
Network operational efficiency	7.50 / 11.81 / 14.98
Return on IT investment	7.55 / 10.73 / 11.49

Source: Accenture CSP Technology Transformation Survey, November 2023

■ 2021-22 ■ 2023 ■ 2024-26   **N=202**

IT TCO Change %

	Increase	No change	Decrease
2024-26	61%	15%	24%
2023	53%	18%	29%
2021-22	38%	31%	31%

Average change %

- 2021-22: 1.48
- 2023: 2.82
- 2024-26: 3.16

IT Opex Change %

	Increase	No change	Decrease
2024-26	58%	18%	23%
2023	51%	23%	26%
2021-22	40%	32%	29%

Average change %

- 2021-22: 1.49
- 2023: 2.59
- 2024-26: 3.32

IT Capex Change %

	Increase	No change	Decrease
2024-26	88%	11%	1%
2023	83%	17%	0%
2021-22	68%	30%	2%

Average change %

- 2021-22: 4.33
- 2023: 5.74
- 2024-26: 5.97

■ Increase ■ No change ■ Decrease

N=202

CSPs currently operate in a market characterized by limited growth and rising network infrastructure costs. The forecast for the future is equally grim. Their IT total cost to operate (TCO) and IT opex and capex are predicted to increase dramatically between now and 2026.

The executives we surveyed know that regaining financial performance depends on significantly reducing current tech debt. They see the other benefits as well: reducing tech debt revolves around embracing modern IT systems that can help them progress toward a simplified, agile and cost-efficient IT architecture. Part of why CSPs face rising IT costs is due to fragmented IT intake across multiple business units and geographies. A new IT structure designed to cut tech debt can be a catalyst for innovation and growth, rather than a cost center.

Source: Accenture CSP Technology Transformation Survey, November 2023.
IT TCO: All expenses associated with acquiring, operating and maintaining telecommunications IT/Network infrastructure, software and services over their entire lifecycle. It includes both IT Opex and IT Capex.

Global telco: A holistic approach to tech transformation

One of the world's leading communications service providers one of the world's largest CSPs, facing significant challenges arising from product, IT complexities inherited from multiple acquisitions and a fragmented IT landscape—needed to shift from being a traditional telco to a digital tech company.

Accenture's approach in guiding the company through these changes was comprehensive. The focus areas included architecture and technology, an agile operating model, and business and IT transformation. Consolidating the tech stack, simplifying the service portfolio, implementing value-driven governance principles, autonomous operation of the digital factor and development of tools and services for enhanced productivity were all part of the process.

Accenture helped simplify the product catalog and internet product design by integrating AI, reducing backend complexity and minimizing errors. It executed a fit-gap approach to align over 400 features with client requirements. The new IT stack enabled the complete digitalization of customer-facing business processes. An organizational shift towards SAFe (Scaled Agile Framework) methodology was achieved by building internal system integration capabilities.

The initiative yielded positive financial outcomes, unlocking value, optimizing costs, and improving planning processes.

Modern IT systems:
A source of competitive advantage

In the face of shrinking revenue and margins, new technologies (e.g., GenAI) and network infrastructures (e.g., cloud native) provide CSPs with a golden opportunity to accelerate their tech transformation. The modern, nimble telco has a digital core based on cloud, data and AI, open technology architectures and interoperability. This aligns with our "Reinvention in the age of generative AI" research,[1] where we found a small number of companies we call "Reinventors" (9%) for whom digital core is a primary source of competitive advantage, have already met the high bar of building the capability for continuous reinvention.[1]

Reinventors have 1.8 times best-in-class digital core capability than the other organizations surveyed and are nine times more likely to invest in remediating technical debt.[2]

The entire infrastructure is flexible and agile, responds faster to changing market demands and enables seamless upgrades to new technologies and capabilities. The resulting competitive advantages address CSPs' central operating tenets, allowing them to own the communications space.

No longer relegated to a defensive stance against digital natives or new entrants, they stand to reap the benefits of:
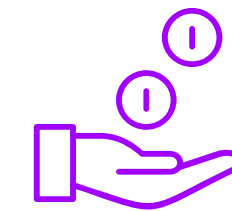
Operational excellence and cost efficiency
Streamlined and optimized operational processes, leveraging AI and data-driven capabilities for higher efficiency. The end-to-end control and orchestration of the connected ecosystem will reclaim their pivotal role in the market.
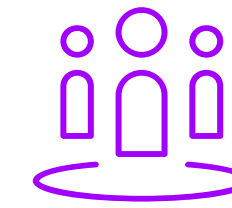
Customer differentiation and product/service innovation
A modern IT system will power omnichannel analytics, automation and artificial intelligence to shift from product- to customer-focus, providing customers with seamless and personalized engagement.
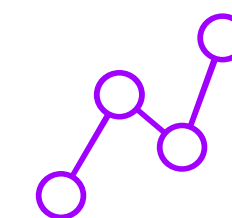
Simplified IT and higher business agility
Flexible and scalable IT infrastructure based on cloud, data and AI will help CSPs manage market demands better and reduce time to market for new products and services.

The gap between vision for the future and current state

CSP executives are aware of the impact of rising tech debt on their organization and acknowledge the urgent need to approach IT transformation differently. In our research, over 66% of respondents are concerned that their companies are burdened by tech debt. In addition,

63%

of CSP executives admit that their company is struggling with the complexity of IT systems associated with the current product and service portfolio.

84%

say that their company will miss future growth opportunities if it fails to accomplish ongoing IT transformation.

79%

recognize that modern IT systems can streamline their architecture and lay the foundation for a modern, nimble telco, focusing on cost-efficiency, streamlined processes, flexibility and innovation.

Our study points to various capabilities and best practices that are critical for building a modern IT system. However, when it comes to implementing them and progressing to more advanced technology adoption, only a handful of CSPs have achieved their goals.

Cloud

For instance, in our study, 93% cited Cloud First infrastructure as a significant capability in the CSP IT architecture. However, only 26% are following advanced practices in transforming their operating model to a Cloud First approach that is enabled by Cloud First mindset at the core. This gap points to a critical need for organizations to not only recognize the importance of cloud technology but to fully embrace and execute sophisticated Cloud First approaches that unlock the transformative potential of the cloud.
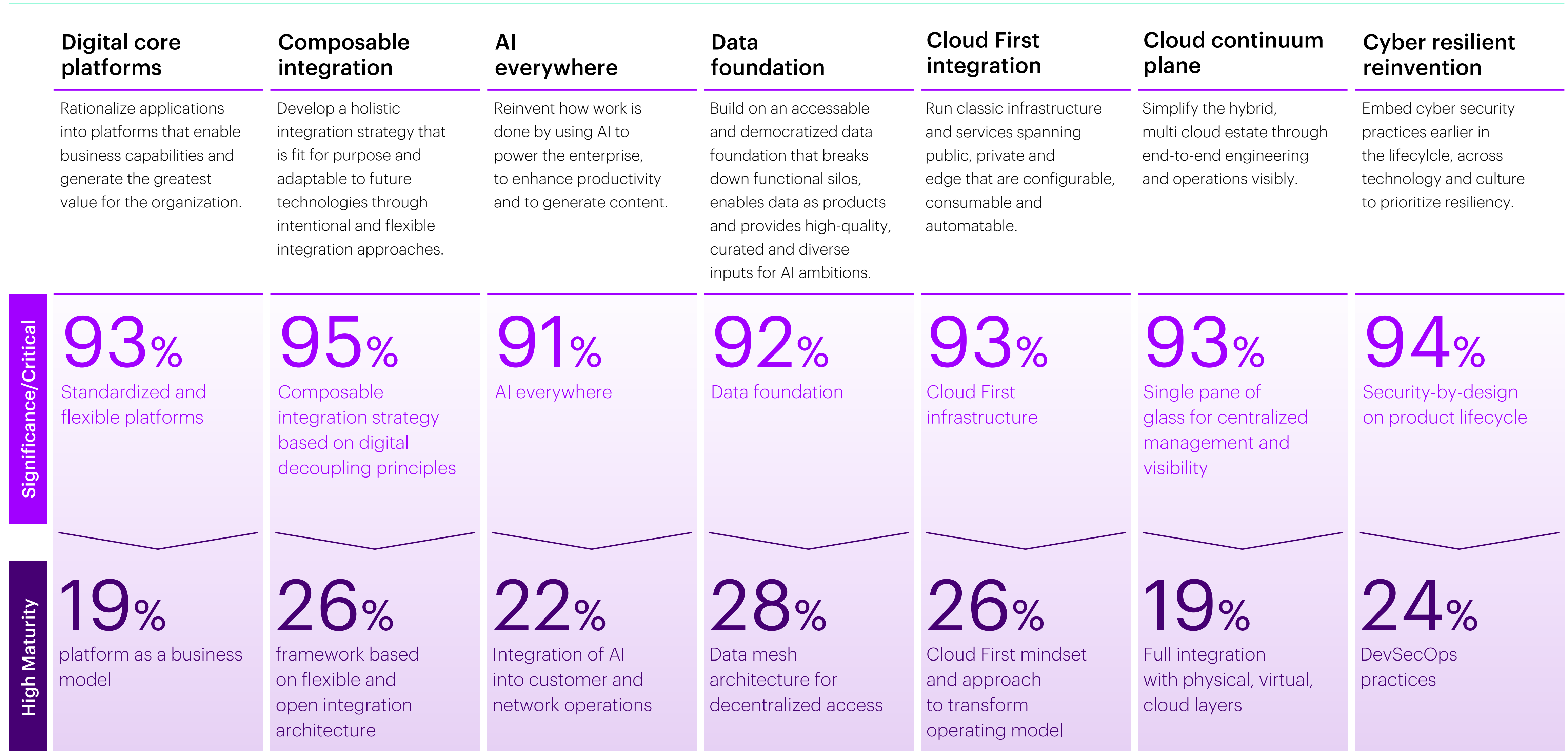
Data

Similarly, while 92% of respondents acknowledge the pivotal role of the new data architectures, only 28% are highly proficient in providing seamless data access with decentralized control and metadata management across systems, clouds and partners. The challenge could be a lack of organized data structures, a unified data model or a cohesive, enterprise-wide strategy for developing data products. Often, it's a combination of these issues. This results in data being trapped in silos, challenging to access and lacking correlation across domains.

AI

Finally, only 21% have a mature strategy to educate employees on AI and to improve senior leaders' fluency in AI concepts, technologies and applications. Only 22% have high levels of AI adoption, including Gen AI, in network operations, customer care services and application and infrastructure operations.

Figure 6: Percentage of executives who highlight critical/high significance for a technology vs. maturity of a technology in their organization

Digital core platforms	Composable integration	AI everywhere	Data foundation	Cloud First integration	Cloud continuum plane	Cyber resilient reinvention
Rationalize applications into platforms that enable business capabilities and generate the greatest value for the organization.	Develop a holistic integration strategy that is fit for purpose and adaptable to future technologies through intentional and flexible integration approaches.	Reinvent how work is done by using AI to power the enterprise, to enhance productivity and to generate content.	Build on an accessable and democratized data foundation that breaks down functional silos, enables data as products and provides high-quality, curated and diverse inputs for AI ambitions.	Run classic infrastructure and services spanning public, private and edge that are configurable, consumable and automatable.	Simplify the hybrid, multi cloud estate through end-to-end engineering and operations visibly.	Embed cyber security practices earlier in the lifecylcle, across technology and culture to prioritize resiliency.

Significance/Critical

93%	**95**%	**91**%	**92**%	**93**%	**93**%	**94**%
Standardized and flexible platforms	Composable integration strategy based on digital decoupling principles	AI everywhere	Data foundation	Cloud First infrastructure	Single pane of glass for centralized management and visibility	Security-by-design on product lifecycle

High Maturity

19%	**26**%	**22**%	**28**%	**26**%	**19**%	**24**%
platform as a business model	framework based on flexible and open integration architecture	Integration of AI into customer and network operations	Data mesh architecture for decentralized access	Cloud First mindset and approach to transform operating model	Full integration with physical, virtual, cloud layers	DevSecOps practices

So, what will it take to move forward?

We evaluated the progress of CSPs in tech transformation through insights gathered from interviewing over 200 senior executives. Components of tech progression analyzed include level of technology significance and awareness of modern IT systems; degree of adoption of key technology components (e.g., cloud-based systems, data and AI, modular and open platforms); and talent and skills for tech enablement.

We found that companies in the top quartile of technology advancement were not only more cost-efficient compared to their low-maturity peers over the past three years, but they also set their sights higher for agility in the coming years. For example, they had:

Lower IT OPEX
On average, over the past two years, the more tech advanced companies reported only a 0.8% rise in IT costs, much lower than the 3.4% average increase of the less tech advanced peers. During the last year, which was marked by high inflation, the more tech advanced companies maintained a modest 2.2% increase in IT costs, compared to 4.4% for less advanced peers.

Lower IT TCO
On average, over the past two years, the more tech advanced companies reported only a 1.5% rise in TCO, much lower than the 3.7% increase of less advanced peers. During the last year, the more tech advanced companies maintained a modest 1.8% increase in TCO, compared to the 4.7% rise for less advanced peers.

Greater agility
Over the next three years, more advanced CSPs foresee a 32% increase in speed to market for new products and services compared to CSPs with lower technological sophistication.

European CSP: A search for B2B lead generation automation that led to a tech transformation journey

A leading telecom provider in Europe faced challenges in its B2B sector. Despite offering advanced IT and communication infrastructure, the company struggled to seize new opportunities and boost sales. The problem lay in its outdated and manual lead generation and marketing campaign management processes. In 2019, with the aim of finding a modern marketing automation solution, the company collaborated with Accenture and Oracle.

But before they began looking for a solution, they conducted workshops to understand the CSP's needs and establish functional/technical requirements. The company's search for a more streamlined marketing solution led it on a journey towards modernization of its IT landscape and transition into an intelligent enterprise. Prototyping of the integration of website and lead data transfer, Oracle Eloqua configurations, extensions development and user training followed.

This resulted in teams equipped with better lead creation tools, allowing for a greater focus on value-generating tasks. The project's success remained resilient during the pandemic, with no impact on sprint ceremonies or management processes. The company achieved approximately 20% opex savings, primarily driven by the consolidation of applications. Custom solutions included the successful migration of midmarket forms and online configurators, coupled with a remarkable increase in the double opt-in rate from 50% to 80%.

In terms of customer experience, the CSP saw improvements in Net Promoter Score (NPS) attributable to targeted campaigns and microsites. The adoption of Oracle public cloud not only enhanced the company's sustainability efforts with CO_2 reduction but also facilitated a significant shift in talent empowerment. Marketing managers were enabled to create more than 20 nurturing campaigns annually, a substantial improvement compared to the previous capacity of 0.5 campaigns per year.

Barriers to holistic transformation

Holistic IT transformations are expensive, prolonged and require radical changes across the organization. Historically, even the more ambitious telcos have balked at undertaking these major changes, instead approaching the exercise as a one-time IT upgrade and missing out on the benefits of transformation.

Our research shows that the top internal roadblocks that CSPs face on their path to IT transformation are enterprise-wide change implementation, budget constraints and internal culture barriers and talent gaps.

Figure 7: Top three internal barriers CSPs are facing on its IT transformation journey (percentage of respondents ranking them among the top three barriers).

Enterprise-wide change — 60%

Budget constraints for IT transformation — 54%

Internal culture barrier and talent gaps — 46%
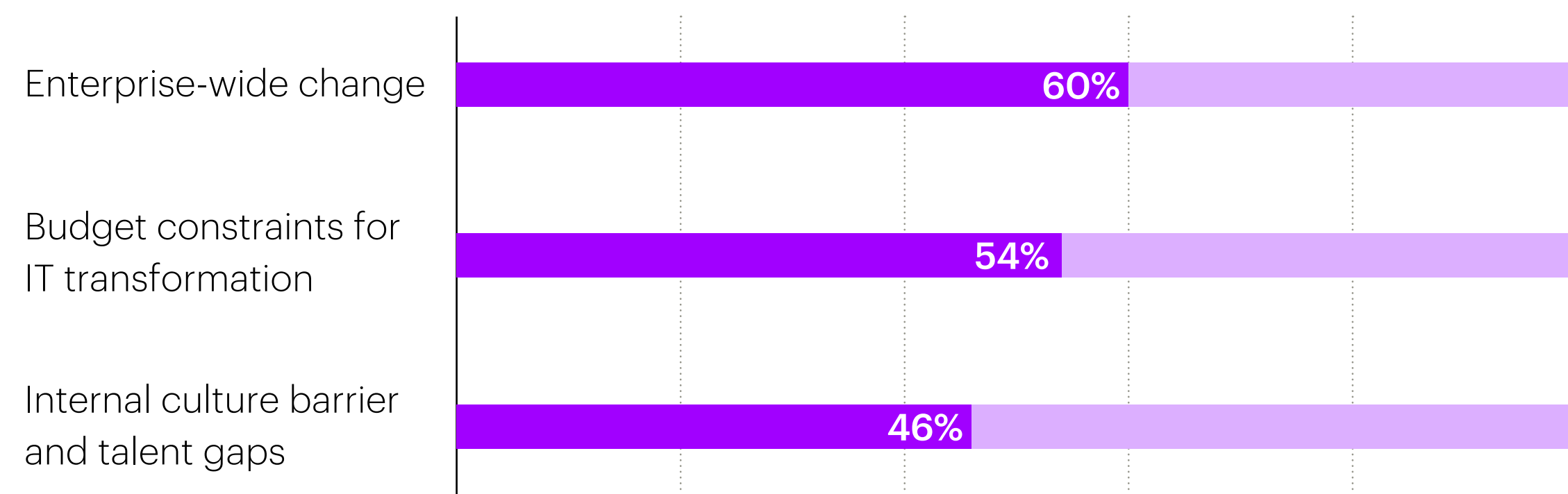
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Enterprise-wide IT change implementation calls for joint business/IT outcome realization and de-risking disruption in customer services, which requires a transition architecture and the capability map to execute the transformation. CSPs' control over technological roadmaps or defining a transition architecture is often limited by a heavy reliance on closed, third-party software products and short-term results. This approach results in vendor lock-in and rigid contractual agreements, further complicating the landscape for IT transformation and resulting in operational inefficiencies in the long run.

Heavy governance coupled with competing business and IT objectives creates a significant barrier to decision-making. Conflicting priorities lead to inefficient budget allocation and difficulties in measuring ROI performance. Budgets are always limited, and under these pressures any resources are allotted to IT opex savings rather than comprehensive transformation.

This directly ties into an enterprise's culture — and almost half the executives we surveyed agreed that culture can be a transformation barrier. Talent allocation is aligned along business silos — for example, specific applications such as CRM, billing or order management — rather than across broader technology capabilities. This siloed focus on program and vendor management roles limits cross-functional collaboration and innovation, and, at worst, stifles a multi-skilled workforce that could contribute to growth and organizational agility.

What success looks like and how to achieve it

CSPs that move swiftly to modernize their enterprise IT architecture and reduce tech debt will have a competitive edge as this will unlock IT simplification, agility and cost efficiency. Modern IT is based on the digital core, powered by cloud, data and AI, open technology architectures and interoperability.

In our "Reinvention in the age of generative AI" research,[2] we find that Reinventors prioritize their digital core as a key competency. They are taking an early lead by leveraging their substantial investment in building their digital core and resources. As a result, Reinventors are making swift progress in executing their strategy and setting out to define a new performance frontier — with technology at the core of their reinvention journey.

Central to modern IT architecture are data and AI. A new data foundation on top of the legacy IT is essential to break silos, reduce complexity and enable the new data-driven organization. To achieve this, they need to:

1. Consolidate existing siloed data sources into a centralized platform.

2. Define foundational data products as the "single source of truth" for data-driven decisions.

3. Establish central data governance to enable security/compliance, quality, consistency, discoverability and reusability across multiple domains.

4. Build AI-powered decision engines leveraging foundational data products to enable data-driven use cases.

5. Set up an innovation factory to continuously identify, incubate and grow data-driven use cases.

6. Use automation and insights to power automated operations and new business models and revenue streams.
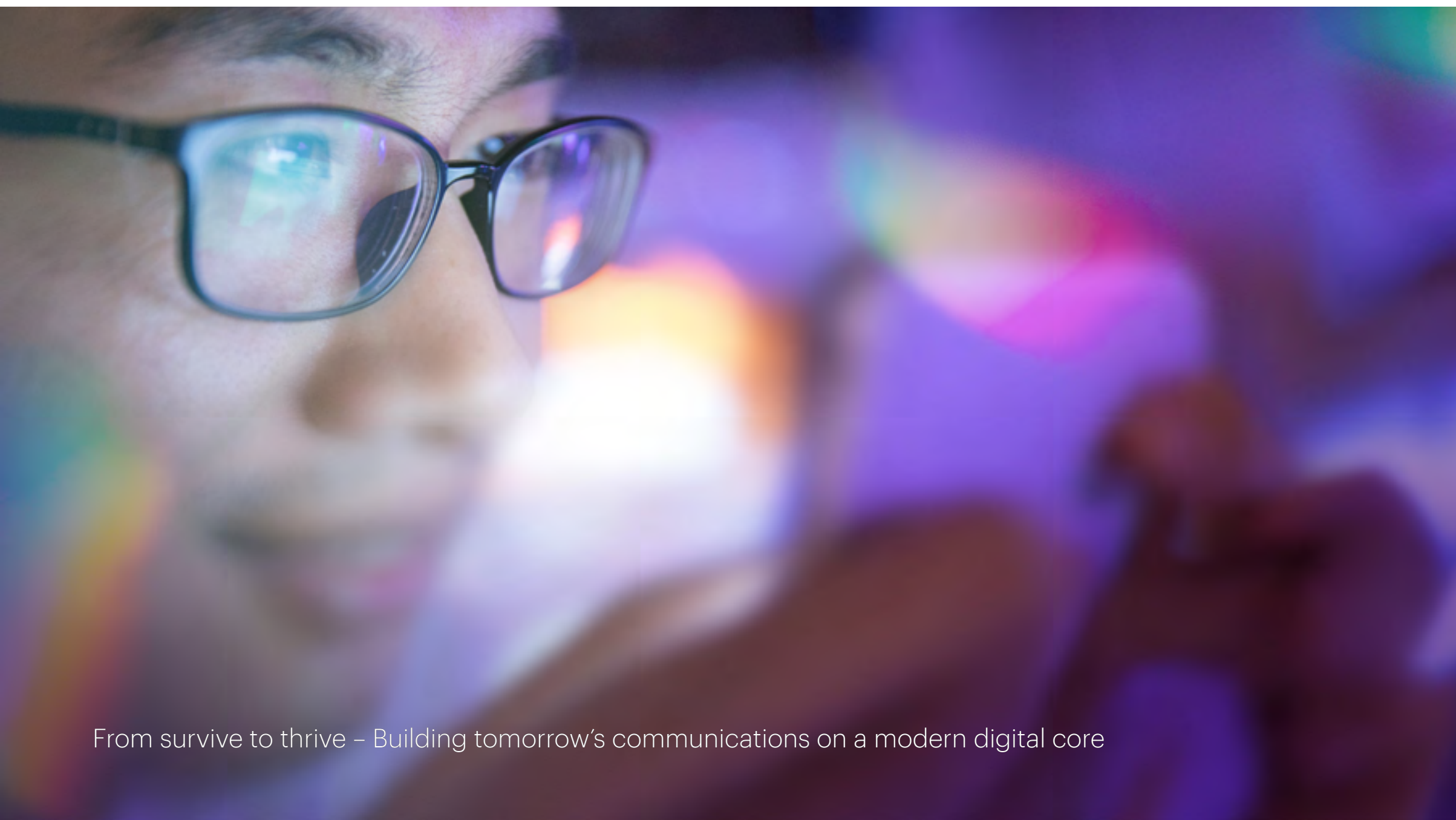
Gen AI, increasingly an essential part of the digital core, is a game-changing technology, enabling significant changes in two areas:

First, it transforms the target blueprint. The modernization priority shifts from legacy re-platforming to building a new telco data platform and AI architecture. Second, Gen AI brings about a revolution in the technology lifecycle, opening up unprecedented opportunities to automate and radically cut down costs and inefficiencies during IT transformations.

In fact, according to our research, Gen AI has the potential to enable productivity gains of 17–23% in the communications industry. Gen AI will automate and augment work in various functions of the communications industry, resulting in time savings and productivity gains as CSPs reinvent processes and talent to new operating model and roles respectively. An overwhelming 97% of global executives in various industries believe Gen AI will be transformative for their company and their industry.[3]

This is why so many of the CSPs Accenture speaks to are eager to dive deeper into what it could mean to their business. In fact, Gen AI is intricately connected to other technologies within the digital core.

As CSPs design, deploy and use AI to drive value, they will also need to mitigate risks by making sure they operationalize responsible AI. Closing the gap between intent and execution of responsible AI requires more than a responsible AI framework for risk management and ethical, sustainable use of AI. It requires an actionable plan that moves from commitment and frameworks to action on the ground.

North American communications and media company: The journey to becoming technology-oriented, yielding significant outcomes across financial and experiential.

A leading North American communications and media company, serving over 10 million subscribers across wireless, cable, and media sectors, faced critical challenges in adapting to modern telecom standards. With a focus on customer-centricity and innovation, the company initiated a strategic transformation program. The challenges included a legacy and unstable technology stack, prolonged delivery cycles, inconsistent agile practices and a disconnect between delivery and business value. Additionally, organizational frictions, vendor dominance, and talent-related issues posed hurdles in aligning skills with innovation.

With the help of Accenture, the company implemented a comprehensive telco-tech transformation program. The approach involved the redesign of processes, the establishment of an agile way of working, and the implementation of new architectures, tools and skills. Accenture focused on simplifying the architecture for cloud-based omni-channel services and introducing automated DevSecOps pipelines. Leveraging proprietary assets like the Maturity Assessment Survey and Tech Hub Operating Model, the program prioritized platform and delivery enhancements, talent empowerment through learning programs and the management of agile processes with defined metrics and KPI dashboards. The transformative efforts yielded significant outcomes across financial and experiential.

By leveraging a standardized continuous integration / continuous deployment pipeline along with automated testing and agile ways of working, development costs were reduced by 30%. Fourteen or more priority value streams were identified for Tech Hub onboarding, and planning processes were enhanced with revisions in budgeting and prioritization, resulting in the delivery of 50% of monetizable epics for the Pilot Value Stream.

Experience improvements included reduced build times, 15+ frictionless services deployed to the cloud, and a unified system of engagement for care and retail channels. Talent empowerment initiatives led to modern software engineering skills for 400+ employees. A collaborative culture campaign engaged 65+ participants. Enhanced delivery efficiency, improved speed and quality and reusable services and a data-driven approach for decisionmaking marked the holistic success of the telco-tech transformation program.

With no time to waste, CSPs' approach to resolving tech and enterprise debt must be swift and carefully planned, aiming for select immediate results to maintain buy-in and momentum. Accenture proposes some key steps could help CSPs' progress quickly and deliver business outcomes.

I. Embrace a fully strategy-led and value-led transformation

A technology transformation led by a clear strategy and value-led mindset can maximize business impact and returns.

Successful implementation of a digital core requires close alignment of the company's technology vision with its core strategic plays, agreed on by both IT and business teams. Often transformation projects or proofs of concept begin without a clear, C-suite-endorsed framework to evaluate their contribution to strategic plays and organization-wide value. It is, however, critical to identify and prioritize strategic plays (see the box below for details on some of the common strategic plays CSPs often adopt) and assess where core technologies can provide unique value.

Major core CSP strategic plays and tech priorities:

Network as a platform (NetCo/Wholesale business)
This strategic play redefines networks as adaptable service platforms, focusing on domain standardization and controlled API service exposure. It is characterized by automation of infrastructure management and use of digital solutions for streamlined, scalable network deployment, processes and monetization.

Connectivity excellence (Consumer/SMB business)
This strategic play aims to reinvent customer experiences and simplify traditional connectivity services via integration of a 360° customer-centric data model and AI-driven platforms to create personalized experiences and self-service apps.

Value chain orchestration (Enterprise business)
This strategic play extends the CSP value chain by orchestrating new B2B2X services, thus creating new revenue streams. It involves building B2B2X solutions through open APIs, setting up a lab with industrialized processes to develop and rapidly deploy services with partners and operating as a managed-services provider.
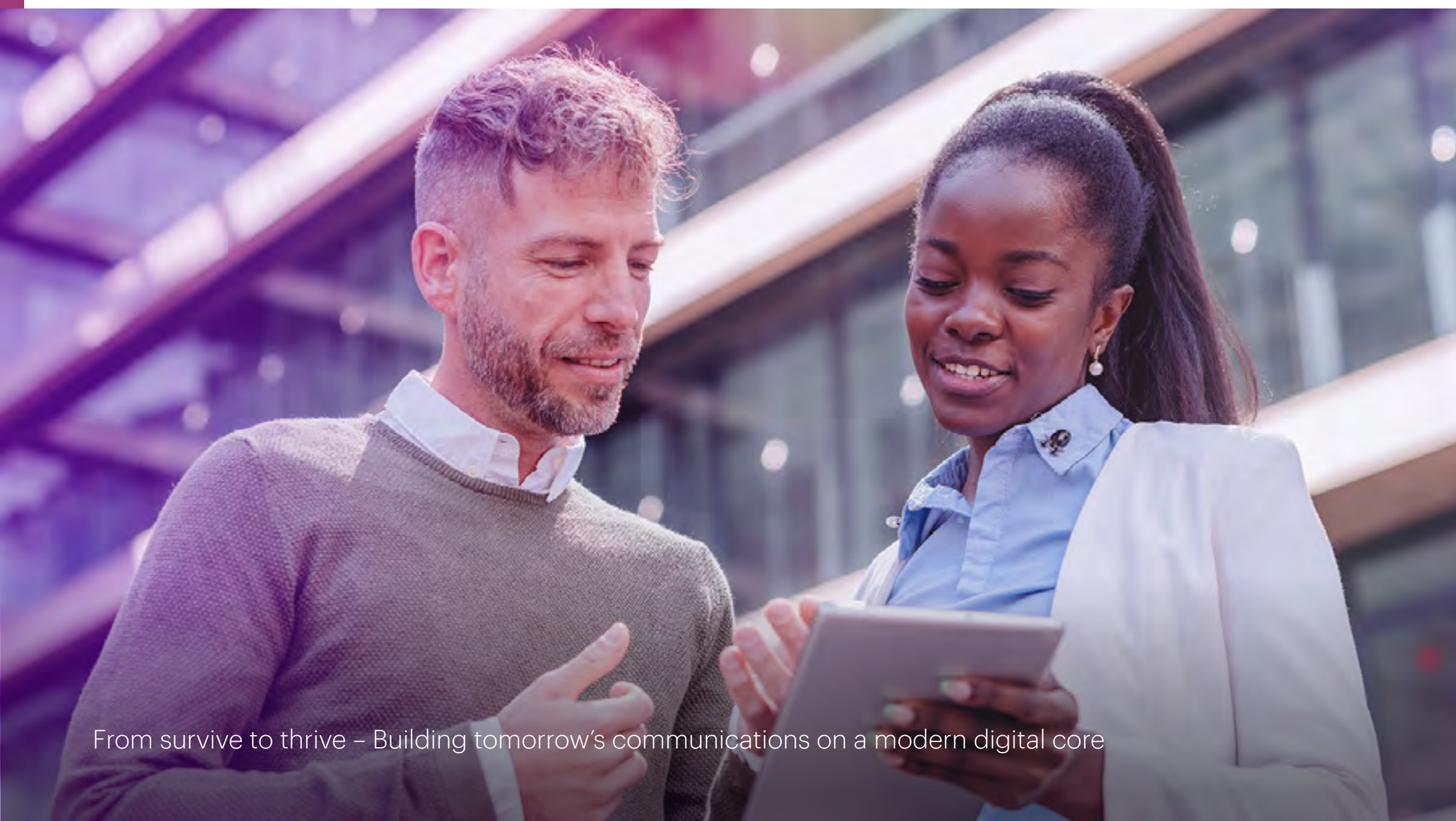
II. Evaluate your tech maturity, set practical targets for modern IT and build a transition architecture accordingly

While there's no one-size-fits-all approach, CSPs' technology advancement can be visualized on a continuum of low to high. And while there will never be a completely tech debt-free state, alignment with the industry's vision of 'modern IT' is possible.

IT modernization is a moving target. CSPs' architecture needs to be regularly reviewed (ideally, once a year) to make sure the transformation is in step with rapidly evolving technologies. A standardized approach to investment valuation and accountability for KPIs throughout the organization offer clear advantages. This way, CSPs can help ensure that funds are efficiently tracked in largescale implementations and identify and implement continuous refinement of technology investment strategies.

After evaluating their current state of maturity, CSPs must migrate from legacy systems to the new architecture in a phased manner — prioritizing migration of critical systems first. This minimizes disruption to ongoing operations, while also building in KPIs.

Big IT transformations take time for full rollout and implementation. It is, therefore, important to create and rely on a transition architecture that keeps CSPs operating effectively throughout. With this in place, CSPs can scale technology transformation beyond a handful of pilot projects to enterprise-wide modern technology application and integration.
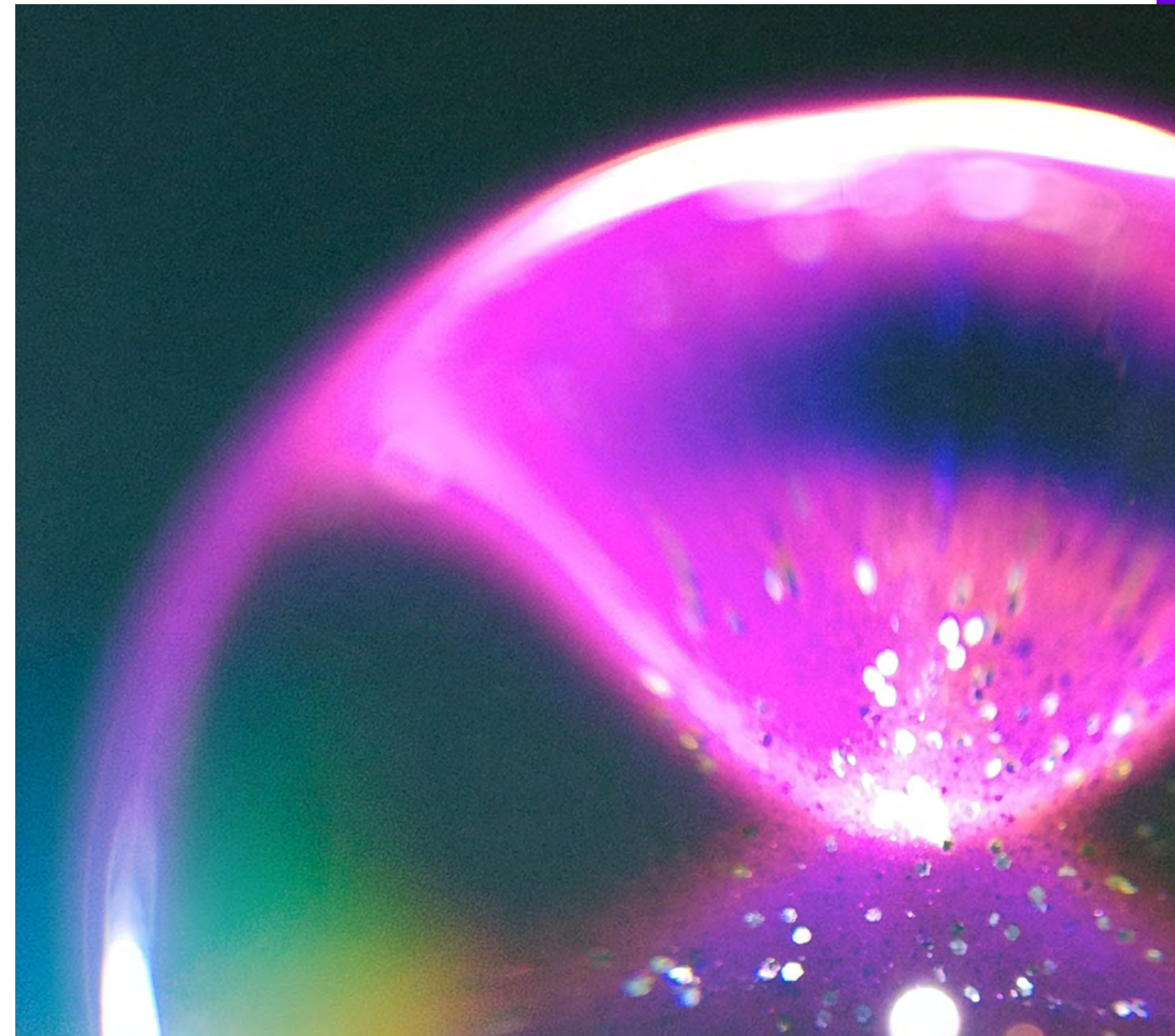
# III. Build future enterprise-wide change implementation with people at the center

Even though organizational and business transformations are often managed separately from technology transformations that address tech debt, most CSP executives acknowledge that tech debt is not just a technology problem. A company-wide enterprise-debt program is required to simplify the product catalog, redesign customers' and partners' engagement journeys and streamline all operational processes.

On the technical side, the immediate requirement is a fast prototype and modern engineering development cycle, built on robust, in-house, tech-driven capabilities alongside shared service functions (e.g., DevOps) and data platforms. This will make technological development more agile and innovative. Such an approach significantly enhances productivity and output.

As important as technology is a people-first mindset. In our study, we found that only 18.7% of CSP executives are confident that their organization has the right talent to meet the demands of emerging IT needs and an overwhelming majority (80%+) agree that their organization requires a cultural shift. Identifying strategic partners in the larger ecosystem is also crucial to capitalize on collaborative opportunities and synergies while expanding market reach.

A comprehensive talent strategy involves acquisition of modern engineering skills and cross-functional capabilities, fostering a culture of product ownership and balancing in-house talent with external expertise.

In this area, Gen AI is emerging as a game-changer for CSPs, offering more than just a technological upgrade. Our research and modeling show that 25–30% of working hours across the global communications industry could be automated or augmented using Gen AI. This shift encompasses every part of the business, from automating customer service interactions to augmenting network maintenance and optimization, opening up unprecedented opportunities to automate and reduce inefficiencies in CSPs' technological operating model.
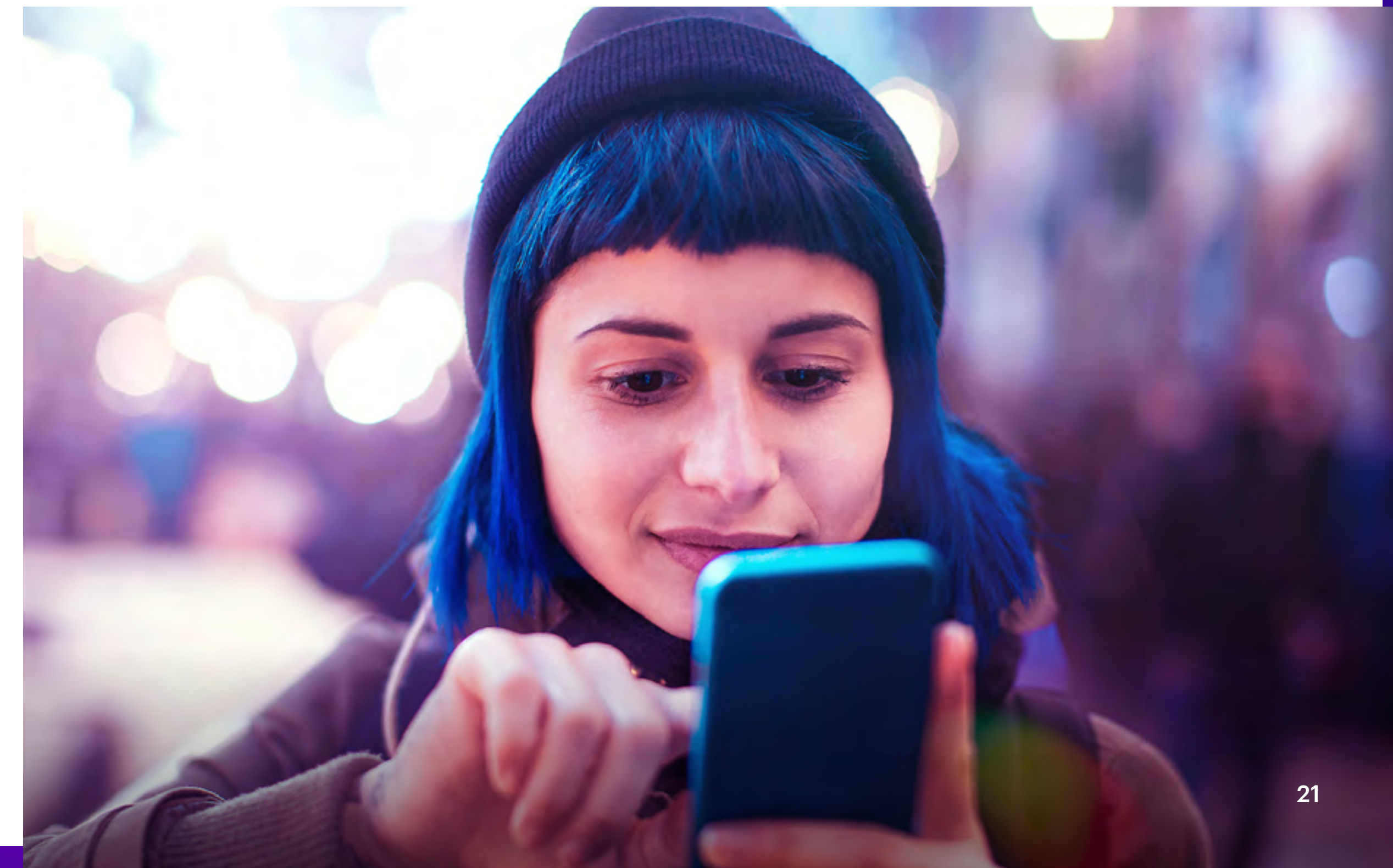
Conclusion

The conventional IT function of CSPs has reached its practical limit for fueling further business growth and driving efficiency. Tech debt is now coming to a head, with the market showing that it's time to evolve or perish. Modern IT systems based on principles of agility, simplification and innovation are necessary for telcos to remain nimble and competitive.

CSPs have now the opportunity to build this transformation towards the new digital core blueprint, centered on data and APIs and enabled by the unprecedent automation opportunity offered by generative AI.

CSPs that make bold bets to reinvent while recognizing the importance of blending technology with people's ingenuity will capture long-term value and build lasting resilience.

About the research

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Our multi-method research approach included a primary survey and expert interviews bolstered by case studies. We also extracted industry-related insights from the Accenture report Reinvention in the age of generative AI (2023).

Primary survey

We rolled out the survey to 252 CSP senior executives and decision makers across the world to assess the challenges CSPs face on their IT transformation journey and to help shape our recommendations.

The survey aimed to:

- Deepen our understanding of CSPs' expectations, vision, investments and barriers to achieving enterprise-wide IT transformation.

- Assess CSPs' maturity on the seven components of Accenture's digital core framework.

- Discover how CSPs can unlock new value by adopting a modern digital core, simplifying IT infrastructure and opening up their IT architecture to the wider ecosystem.

- Explore how CSPs can reduce their tech debt, transform business processes and streamline operations to radically simplify IT and reduce costs.

Expert interviews

We interviewed Accenture leaders who work directly with clients, to explore their plans for IT transformation.

Case studies

To complement the survey findings, we gathered case studies of organizations that Accenture helped move towards modern IT. These case studies illustrate modern IT's transformative impact on business and best practices for a successful transformation.

References

1. Accenture, Reinvention in the age of generative AI
2. Accenture, Reinvention in the age of generative AI
3. https://www.accenture.com/nz-en/blogs/cloud/why-global-leaders-think-generative-ai-game-changer

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Accenture Research creates thought leadership about the most pressing business issues organizations face. Combining innovative research techniques, such as data-science-led analysis, with a deep understanding of industry and technology, our team of 300 researchers in 20 countries publish hundreds of reports, articles and points of view every year. Our thought-provoking research developed with world leading organizations helps our clients embrace change, create value and deliver on the power of technology and human ingenuity. For more information, visit Accenture Research on **accenture.com/research**

Contributors

Acknowledgements