



Lead through value migration

How Chinese enterprises can turn reinvention
into future advantage



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Value is migrating toward future-focused businesses, fast

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The great value migration is accelerating in the age of AI

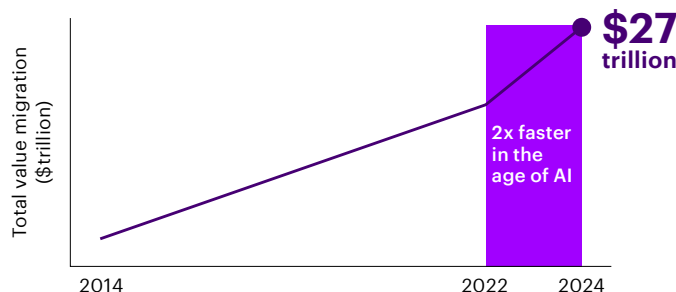
Over the past decade, capital markets have completed a deep and sustained revaluation, with \$27 trillion in enterprise value changing hands globally.¹ About 20% of today's largest companies by revenue were not among the leaders a decade ago, and one in four of the former value leaders* had fallen from the ranks by 2024.² The competitive landscape is being reshuffled at speed.

Since the rise of generative AI in 2022, the pace of value migration has doubled (see Figure 1). Roughly one-third of the decade's value migration occurred in just two years. Over the decade, the market became 25% more future-focused, as reflected in rising EV-to-EBIT ratios.³ Investors are increasingly willing to pay a premium for the ability to keep creating value in the future, not for what enterprises earn today.

In a landscape that is continuously being rewritten, and against a backdrop of greater geopolitical complexity, value is flowing to those who can rebuild how they operate, raise the value density of what they do and capture growth across multiple markets.

Figure 1 The pace of value migration has doubled in the age of AI

\$27 trillion in enterprise value migrated over the past decade, with roughly one-third of that movement occurring since 2022



Source: Accenture Research analysis, based on data from S&P Global Capital IQ.

*Value leaders are defined as the top 20% of companies in terms of total enterprise value.

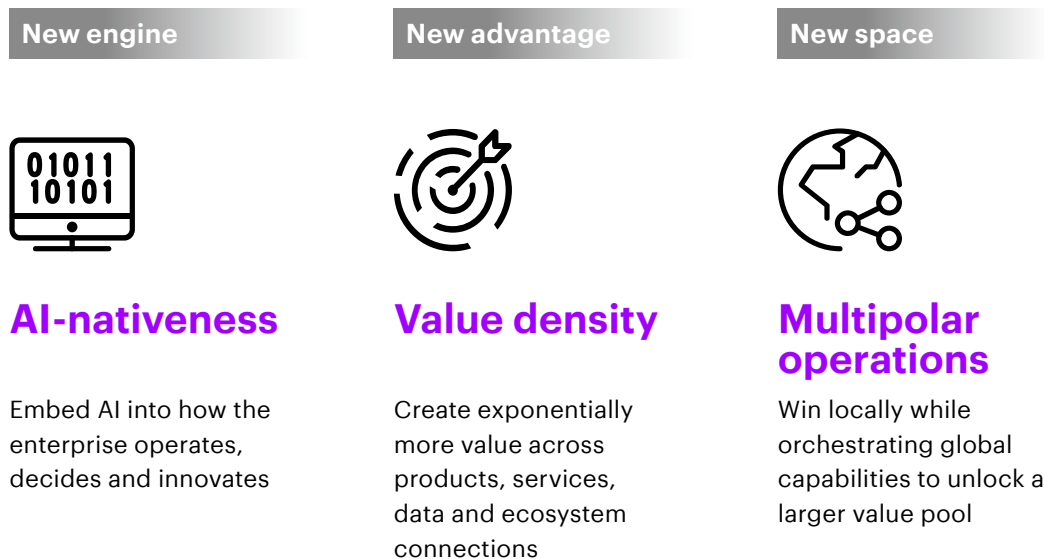


02

Three capabilities defining the next future-focused leaders: AI-nativeness, value density and multipolar operations

As AI redraws the map, three capabilities fuel future growth, separating tomorrow's leaders from the rest (see Figure 2). Enterprises built for the next growth curve are embedding AI at their core, creating more value from every resource and expanding growth across multiple markets.

Figure 2 Three capabilities will define the next future-focused leaders





New engine: AI-nativeness

Many organizations still think of AI as another technology capability, but future leaders treat it differently. They embed AI into how the enterprise operates, decides and innovates. By the end of 2025, China's generative AI user base had crossed 600 million,⁴ and industries are shifting from experimentation to scaled deployment. AI is becoming a reusable general-purpose capability that penetrates decisions and operations across the enterprise. Enterprises that still treat AI as an efficiency tool risk losing the new sources of competitive advantage.



New advantage: Value density

Value density is about creating exponentially more value across products, services, data and ecosystems. Growth is no longer constrained by the amount of resources an enterprise owns, but by how much value it can create from them. China's economy is diverging: high-value enterprises are moving up, while low-value-added competition intensifies. As returns from scale-driven growth diminish, developing new advantages increasingly means using AI and data to multiply the value generated by existing resources.



New space: Multipolar operations

The next phase of globalization is no longer about expanding everywhere; rather, it is about operating effectively everywhere. Shifting geopolitics, regional supply-chain reconfiguration and divergent regulatory environments are reshaping global markets into a set of interconnected but differently governed regional systems. In this environment, companies need multipolar operations, the ability to mobilize global capabilities at speed while remaining locally relevant. The core requirement of going global has evolved from expansion capability to multipolar operating capability: rooted locally, coordinated globally and responsive dynamically.

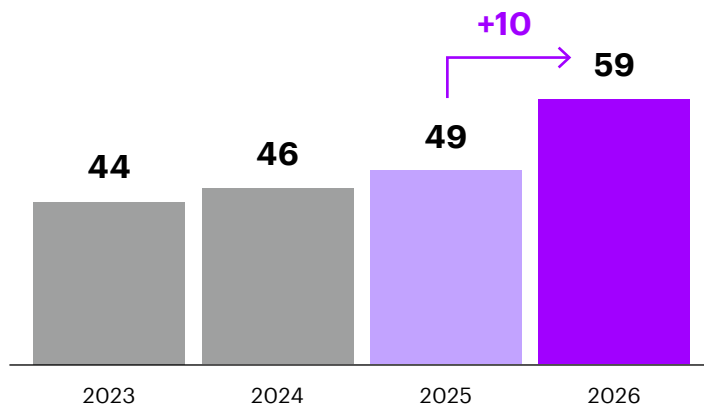
Enterprise intelligence is surging but most Chinese enterprises are not ready to migrate value

Chinese enterprises are making rapid progress in digital transformation. Generative AI and agentic AI have driven the strongest year-on-year improvement in the Digital Transformation Index (DTI) since the research began. The 2026 China DTI rose by 10 points year-on-year (see Figure 3), with the sharpest gains in three areas: growth, manufacturing and digital core. On the growth side, AI adoption is accelerating, with marketing, content generation and customer engagement up 14 percentage points (pp). On the manufacturing side, digital twins jumped 27 pp and AI-enabled R&D advanced 22 pp. Across the digital core, data governance maturity improved by 14 pp.

10%
of enterprises
show early
strength in future
capabilities

Most organizations have become better prepared for today's competition; few, however, are prepared for tomorrow's. Only 10% of enterprises show early strength in future top 20%,* which require turning AI investments into capabilities that can actively capture value migration.

Figure 3 China Digital Transformation Index (0-100), 2023-2026



Source: Accenture China Digital Transformation Index CxO survey (N=160, March 2026), IDC, Arabesque S-ray, Accenture Research.

*These enterprises include those with a Digital Transformation Index (DTI) score in the top 50% of their industries and top 20% rankings in at least two of the three future capabilities.

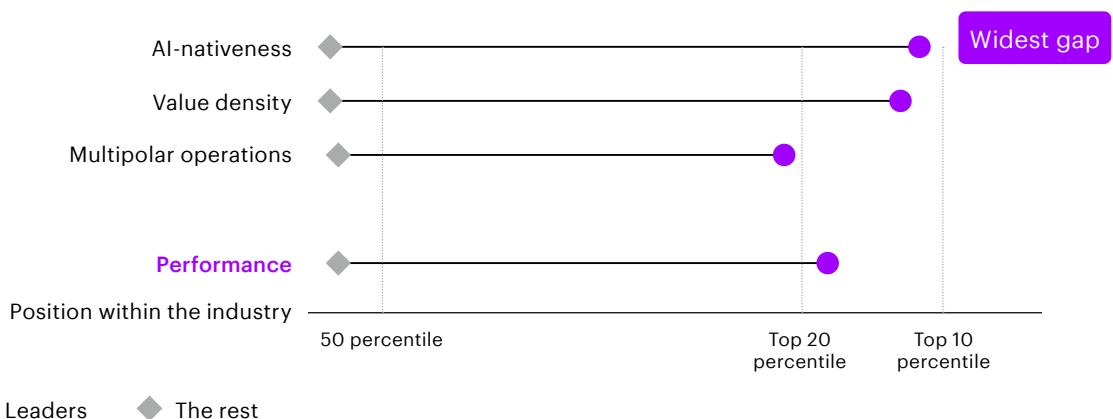
Capability gaps emerge first. Performance gaps follow.

Capability gaps appear long before financial gaps do. By the time differences show up in revenue growth or profitability, the competitive advantage has already been established (see Figure 4).

Across the three capabilities, AI-native capabilities show the widest gap between leaders and the rest, making AI the clearest differentiator in the next phase of competition.

But AI is not a standalone source of competitive advantage. Its greatest impact comes from strengthening the other two future capabilities. AI helps enterprises increase the value created from products, services and data, while enabling faster coordination across markets, operations and ecosystems. As these capabilities reinforce one another, leaders build compounding advantages over time. The capability divide is already visible, while performance returns are only starting to emerge. But as value continues to migrate toward future-focused enterprises, today's capability gaps are likely to become tomorrow's value gaps.

Figure 4 Leaders are ahead on all three capabilities, but AI-nativeness makes the biggest difference



Source: Accenture China Digital Transformation Index CxO survey (N=160, March 2026).

Note: Z-scores after intra-industry standardization, 0=industry average; positive values=outperforming peers; negative values=lagging behind peers.

Inside the leaders' playbook

Leading enterprises are not waiting for value migration to play out. They have already identified the future value space and are building AI-nativeness, value density and multipolar operations in parallel. Their playbook offers a forward-looking reference for how Chinese enterprises can allocate resources and prioritize investment.

Capability 01: AI-nativeness

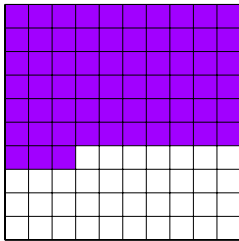
Leaders build AI as an enterprise capability

As noted, Chinese enterprises have gone through a burst of AI deployment. Yet most AI initiatives still deliver localized efficiency gains, while enterprise-wide reinvention lags (see Figure 5).

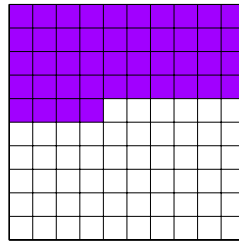
Three common bottlenecks typically hold enterprises back. First, value is often unclear, with leaders still uncertain about where AI creates business impact. Second, direction is fragmented as AI is not yet tied to strategy, resulting in isolated pilots. Third, foundational gaps in technology, data, talent and governance continue to slow AI scaling.

Figure 5 The gap between deployment and reinvention remains wide

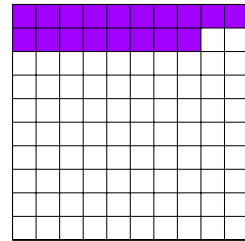
63% have deployed AI assistants for employees



44% have started redesigning job requirements



Only **18%** are systematically redesigning workflows



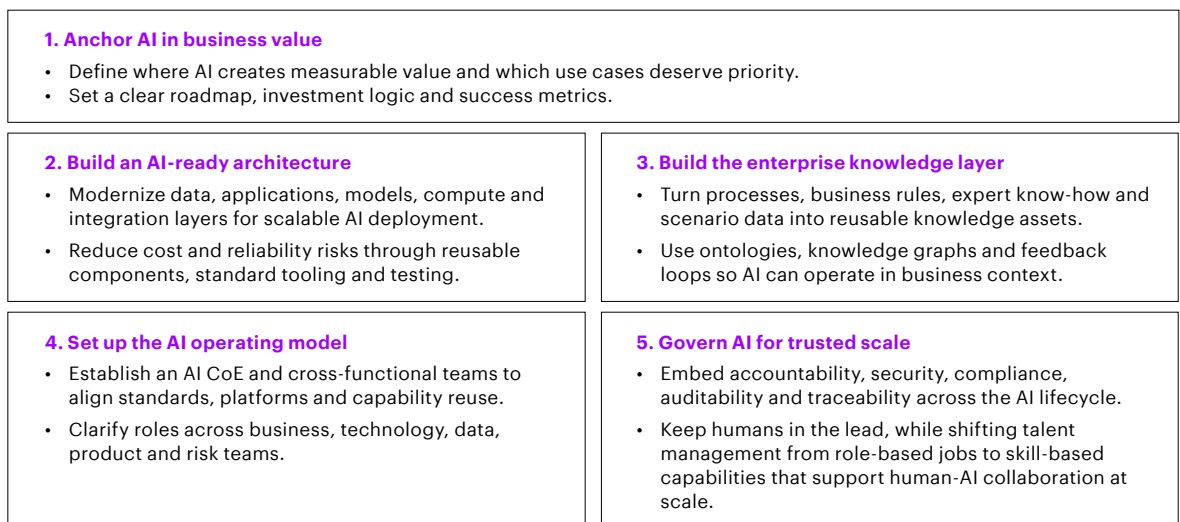
Source: Accenture China Digital Transformation Index CxO survey (N=160, March 2026).

As AI moves deeper into the enterprise, three new barriers are emerging. Particularly with agentic AI, scaling becomes a cost, architecture and governance challenge. **These are a token tax, an architecture trap and a trust deficit.** On the token tax, consider: AI costs are widely underestimated, making budget control a growing concern. Single calls that look efficient in static tests translate into ongoing, compounding spend across enterprise scenarios. The architecture trap has to do with legacy architectures, siloed data and disconnected systems. In complex workflows involving multiple tools,

AI task success rates average 72%, below enterprise requirements for execution-critical use cases in risk, supply chain and similar domains.⁵ Meanwhile, without auditable, traceable and trustworthy AI governance, 29% of Chinese enterprises would rather delay AI scaling or reduce AI investment—a trust deficit that could jeopardize future competitiveness.⁶

To scale AI as an enterprise capability, leaders need to pursue five interdependent moves concurrently. They need to set the organization's direction by identifying where AI can create the greatest business value and aligning investments around those priorities. To support that direction in practice, they need to modernize their technology architecture so that data, applications and AI systems can work together seamlessly, while supporting an enterprise knowledge layer that captures business rules, processes and expertise in forms AI can use. An AI operating model powers this by bringing business, technology and risk teams together around common standards, platforms and ways of working, so successful AI solutions can be scaled and reused across the enterprise. Governance underpins all, ensuring AI remains secure, compliant, transparent and trusted as adoption scales.

Figure 6 Five moves to scale AI as an enterprise capability



Taikang Insurance Group Inc.

offers a compelling example. As life expectancy rises, retirement increasingly involves decades of healthcare, eldercare and wellness management—creating both strategic opportunities and operational complexity for insurers.

When the generative AI wave arrived, Taikang made a deliberate choice: rather than entering a costly race to build proprietary foundation models, it focused on knowledge engineering, systematically capturing expert judgment and proprietary data into forms that AI can directly apply. The company believes that while foundation models will become commoditized, proprietary enterprise knowledge will not.

The results are tangible. Taikang's AI-powered underwriting tool—consolidating 1,000+ product rulebooks, 1.8 million medical knowledge entries and 50,000 annotated expert reasoning

cases—delivers underwriting decisions in under a minute with more than 95% accuracy,⁷ allowing tens of thousands of top-performing human agents to give customers an instant answer instead of waiting for a team of just over 60 specialists who are qualified to render underwriting decisions.

Taikang's experience illustrates a broader shift in enterprise AI. As foundation models become more accessible, competitive advantage increasingly depends on how effectively organizations transform proprietary knowledge into reusable enterprise capabilities.

GE HealthCare offers a compelling example of how global enterprises can scale AI effectively in China. With more than three decades of operations in China, the company has developed strong local capabilities while maintaining close alignment with its global innovation network. Today, it is applying the same approach to scale AI across the enterprise.

To balance global consistency with local market needs, GE HealthCare has adopted a “global standards, local innovation” AI governance model. Under this approach, China operates within the company’s global governance framework while retaining the flexibility to design the governance processes and deploy AI solutions tailored to local market needs.

This enables a continuous cycle of innovation: global governance standards and best practices provide a foundation for rapid local innovation to ensure enterprise-wide governance, while innovations developed in China enhance

the AI capabilities across the organization in return. For example, an AI-powered quality inspection solution developed in China for local service operations has been adopted in other markets. The China team also contributes governance practices and implementation experience to help strengthen the AI reinvention across GE HealthCare globally.

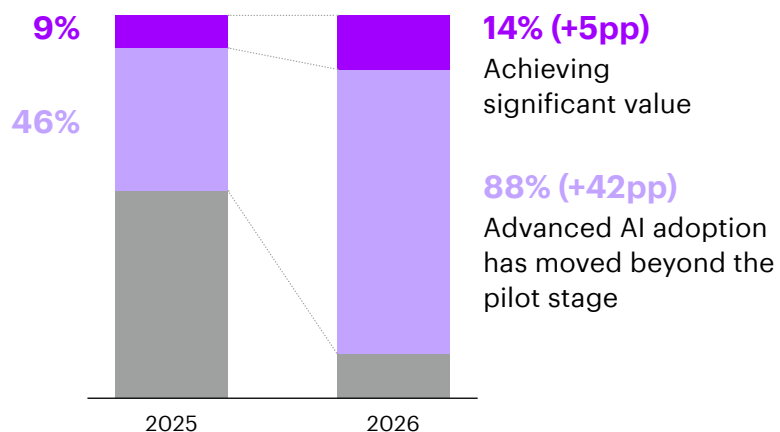
GE HealthCare’s experience demonstrates that scaling AI in a global enterprise requires more than common technology platforms. Success also depends on an operating model that combines centralized governance with local empowerment, enabling innovations developed in China to become scalable capabilities across the enterprise.

Capability 02: Value density

Leaders rewrite the growth equation with AI

Chinese companies are no longer looking to AI for efficiency gains alone. The majority (82%) now expect AI to drive new business growth.⁸ However, value realization continues to lag, with 29% of companies citing unclear ROI.⁹ Advanced AI adoption has moved beyond the pilot stage, from 46% in 2025 to 88% in 2026 (+42pp), but the share achieving significant value has increased only marginally, from 9% to 14% (+5pp) (see Figure 7). Scale, on its own, is not producing value.

Figure 7 AI adoption and value realization among Chinese companies, 2025 versus 2026



Source: Accenture China Digital Transformation Index CxO survey (N=160, March 2026).

Whether AI investment will translate into growth is not simply about adding more use cases. Instead, companies need to be able to use AI to rewrite how value is created. Leading enterprises make this leap through four shifts in AI-enabled value creation: from selling products to outcomes, from managing to monetizing complexity, from usable data to trusted decisions and from internal capabilities to agentic networks.

From selling products to selling outcomes

Leaders are moving beyond selling products, platforms or service features to monetizing business outcomes. Competition shifts from what can be sold today to the ability to deliver better outcomes continuously, with AI enabling the sensing, learning and adaptation that outcome-based models require.

Manufacturers often treat product delivery as the end of the customer relationship, but **Yadea** is turning it into the start of a new relationship. As the world's first two-wheeled EV brand to surpass 100 million units in cumulative sales,¹⁰ the company is responding to the rise of younger consumers and changing expectations by transforming its sales network into a user engagement network.

By 2026, Yadea expects approximately 40% of its vehicles to be equipped with connectivity features.¹¹ After delivery, each vehicle can be linked to Yadea's backend system via its vehicle ID, embedded chip and Bluetooth. Customers may navigate on their phones and enjoy all the convenience brought by these functions while Yadea views it as

an entry point to identify, track and capture data in order to better serve customer needs.

Building on this connected-vehicle foundation, Yadea is expanding beyond product sales through standardized after-sales services, subscription offerings, customization and digital services. Data from connected vehicles—including usage patterns, riding behavior and customer feedback—flows directly into product development, pricing and channel management. By turning every vehicle sold into a source of recurring revenue, customer insight and product improvement, the company is creating a continuous value cycle that strengthens both customer outcomes and business growth.

From managing complexity to monetizing complexity

Complexity is no longer only a cost or risk to manage. It can become a source of differentiated value.¹² AI helps companies operate high-volume, multi-party and uncertain scenarios with far greater precision, turning complexity that once had to be simplified into scalable service models.

StarCharge illustrates how complexity itself can become a source of competitive advantage. As the EV charging industry matures, competitive advantage is moving beyond hardware expansion toward the ability to coordinate increasingly complex energy systems.

Rather than simply selling charging equipment, StarCharge has evolved into an integrated platform that combines charging infrastructure, local energy management and virtual power plant capabilities. The shift has made software and system orchestration capabilities central to its competitive advantage. This broader capability set has also opened up new opportunities in

overseas markets, particularly in emerging markets where integrated energy solutions provide a practical alternative to traditional grid expansion.

AI acts as the system's intelligent digital brain. Drawing on real-time data such as weather conditions and electricity prices, together with predictive models for energy demand and generation, the platform dynamically optimizes charging, storage and energy dispatch. Customers simply specify when their vehicles are needed, while AI determines the optimal charging schedule and energy source. In one industrial-park case, this reduced charging costs by 21% and lifted station operating returns by 22%.¹³

From usable data to trusted decisions

As AI participates in decisions, the bar shifts from data availability to decisions that are explainable, traceable and trusted. Leaders build decision-making evidence chains that show what data was used, what rules were applied and how outcomes were generated, making cross-functional workflows verifiable and auditable.

JD Business shows what this looks like in practice. China's enterprise procurement market remains largely untransformed, with digital penetration at just 11.5%,¹⁴ procurement and business operations have long operated in silos. JD Business identified this disconnect as an opportunity to introduce its "Business-Procurement Integration" to elevate procurement from a cost center to a strategic value driver.

AI is the critical enabler. By embedding AI across procurement, supply and fulfillment, JD Business enables procurement decisions that previously required extensive manual coordination. In one project for a leading automotive company, sourcing covered spare parts and employee benefits across multiple sub-

brands and manufacturing sites. Manual supplier screening, price comparison and inventory coordination once made the process slow and labor-intensive; JD's AI-powered supply-demand matching system now runs multi-dimensional analysis and scenario modeling to significantly cut procurement cycles and manual workload.

The result: transparent and traceable procurement, quantified cost savings delivered through regular client reports, and procurement decisions that are increasingly data-driven and auditable. JD Business's experience shows that AI creates value not only by improving efficiency, but also by making complex enterprise decisions more transparent, consistent and scalable.

From internal capabilities to agentic networks

Value creation is moving beyond the walls of a single enterprise. Leaders extend enterprise capabilities to customers, suppliers, channels and ecosystem partners, and let competition play out through intelligent collaboration across organizations, scenarios and ecosystems.

Alibaba.com is a good illustration of this shift. Cross-border B2B trade has traditionally required dozens of fragmented interactions across buyers, suppliers, logistics providers and compliance processes. Rather than simply connecting market participants, Alibaba.com is evolving from a B2B marketplace that connects buyers and sellers into an Agent-to-Agent (A2A) intelligent trade network that executes business tasks around the clock.

Through its Accio Work platform, Alibaba.com has embedded AI directly into trade flows and store operations. Companies specify a business objective, while multiple AI agents coordinate and conduct activities such as market research, product design,

supplier selection, listing creation and marketing execution. Tasks that once required weeks of work, such as building a cross-border online store, can now be completed in around 30 minutes.¹⁵

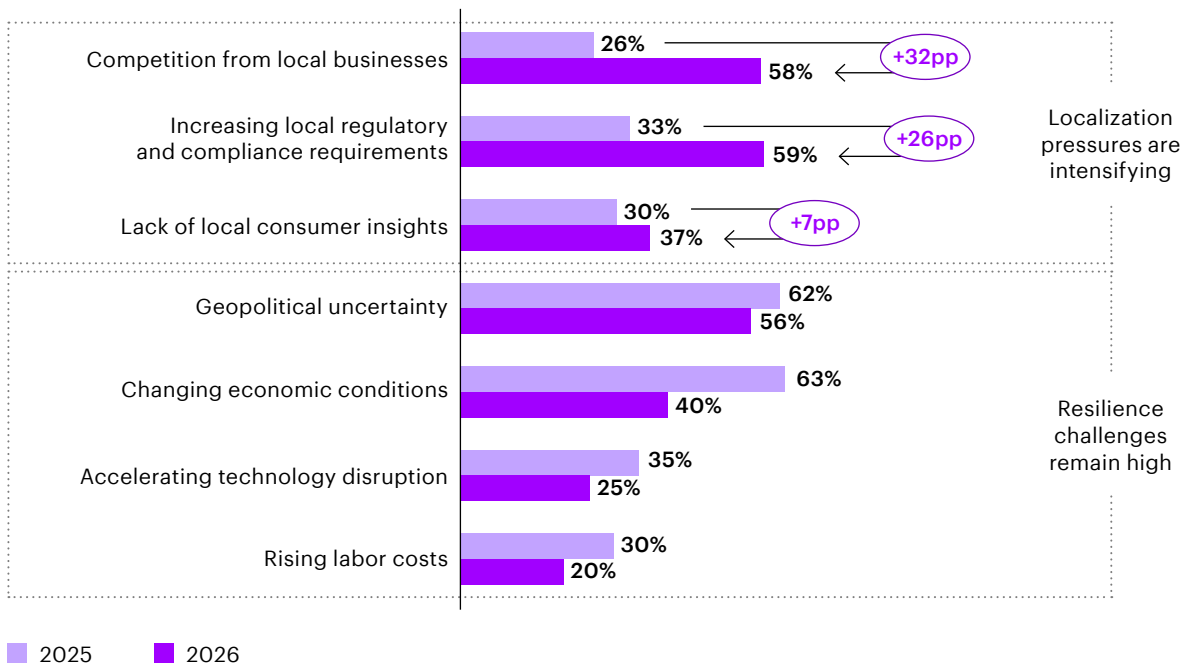
Beyond task automation, the enterprise edition of Accio Work enables organizations to codify proven expertise into reusable digital capabilities that AI agents can execute collaboratively across teams. Alibaba.com's Accio Work platform does more than simply speed up tasks—it embeds enterprise capabilities into AI agents and extends them beyond organizational boundaries, allowing expertise to be shared and executed across a broader ecosystem.

Capability 03: Multipolar operations

Leaders use agentic AI to close brand value gaps and amplify existing strengths

Chinese companies are shifting from market entrants to local competitors. Localization pressures are intensifying (see Figure 8): competition from local businesses is up 32 pp versus 2025, local regulatory and compliance requirements are up 26 pp, and the lack of local consumer insights is up 7 pp. Alongside these, geopolitical uncertainty, changing economic conditions, accelerating technology disruption and rising labor costs continue to weigh on overseas operations.

Figure 8 Challenges in overseas operations

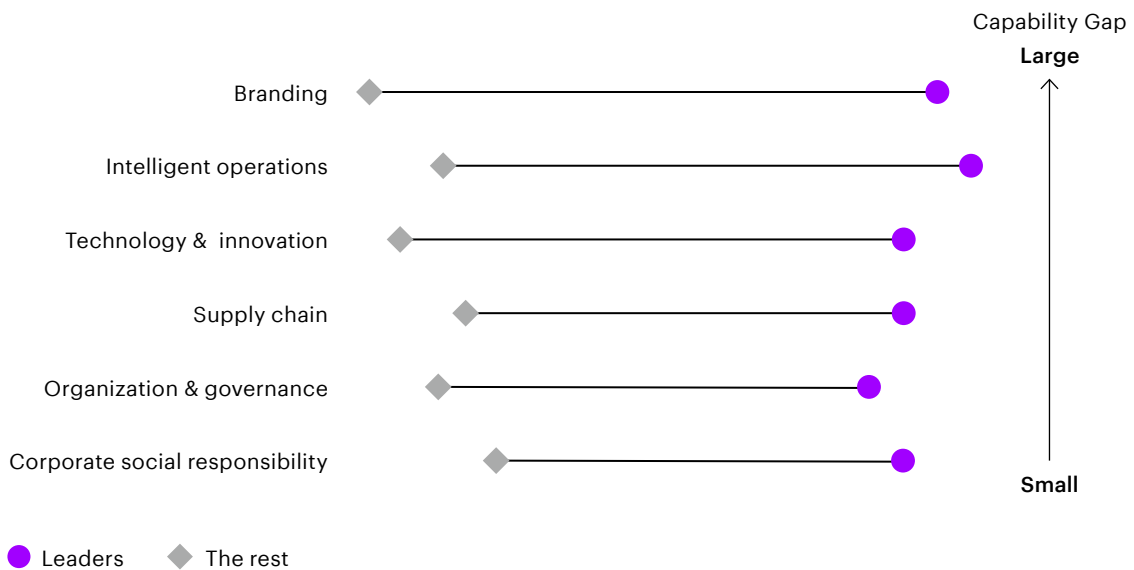


Source: Accenture China Digital Transformation Index CxO survey (N=160, March 2026).

Furthermore, building global influence remains a significant challenge. According to this year's survey, 60% of Chinese companies aspire to become global leaders, yet only 12% believe they can influence the direction of their industry or shape competitive dynamics globally, and just 5% have established globally influential brands. China's strengths in engineering excellence, manufacturing efficiency and product innovation have not yet translated into sustained market influence.

A larger value pool awaits globally, but only for those who win locally. Compared with their peers, leading companies consistently outperform across the capabilities that matter most to local success, including intelligent operations, technology and innovation, supply chain, organization and governance, and corporate social responsibility (see Figure 9).

Figure 9 Capability gaps between leaders and the rest



Source: Accenture China Digital Transformation Index CxO survey (N=160, March 2026).

Two moves distinguish these leaders. First, they create value locally by understanding customer needs, shaping demand and building brand equity rather than simply selling products. Branding, in fact, is where they show their largest advantage over others. Second, they operate globally as one connected enterprise, orchestrating production, supply chains, inventory and operations across geographies into one connected network, coordinated and orchestrated in real time. Together, these capabilities enable leaders to combine local relevance with global scale, turning international expansion into sustained value creation.

Agentic AI is reshaping how brands are discovered, evaluated and chosen. AI has opened a window of opportunity: 71% of global consumers expect generative AI to influence at least half of their purchase decisions over the next year, and 37% of brand-loyal consumers would switch brands if an agent found a better fit.¹⁶ Brand visibility within AI agents' recommendation logic becomes a new competitive battleground.

To succeed, companies need to influence both agents and customers. Leaders are making three strategic moves:

- They decode local needs by analyzing consumer prompts, comparison criteria, trade-offs and the reason an agent recommends or rejects a specific brand.
- They earn agents' recommendations by making products, prices, services and proof of value easy for agents to find, understand, compare and verify.
- They close the execution loop, feeding agent insights back into innovation, marketing, service and supply chain, combining local responsiveness with globally coordinated execution.

Agentic AI creates a rare opportunity for Chinese companies to turn product and operating strengths into market influence—without taking the decades-long path of established global brands.

Putting strategy into action

Most enterprises have spent the past few years putting their digital foundations in place. In the age of AI, that is no longer enough to win the next round of competition. Based on what leading companies are doing today, we believe Chinese enterprises need to make three shifts.

01

Make AI your enterprise's new DNA

AI-nativeness is the new price of entry. AI is no longer simply a tool for improving efficiency; it is now reshaping how the enterprise decides, coordinates and innovates. Rather than layering AI onto existing processes, leading companies are redesigning operating models around it, turning AI into a reusable, continuously evolving enterprise capability.

02

Rewire how growth is created

When AI becomes the engine of growth, growth itself is redefined. Scale-driven growth is losing its edge, and how value is captured is being rewritten. The task ahead is to use AI to reset the value equation so that the same resources produce meaningfully higher returns by moving from selling products to delivering outcomes, from simplifying complexity to turning it into value, from usable data to trusted decisions, and from internal capabilities to agentic networks.

03

Go multipolar for a bigger prize

Global scale wins reach, while local depth and intelligent orchestration win value. The next phase of Chinese enterprises' globalization is not about broader coverage; it is about creating and amplifying value across markets: anchored in resilience, sharpened by capability and extended by influence. Across multiple markets, regulators, supply chains and production sites, AI is becoming the critical lever that lets enterprises stay locally rooted, globally coordinated and intelligently responsive.

The next era belongs to those who don't just ride the value migration, but shape where it flows.

Research methodology

This study is the ninth consecutive year of Accenture's China Digital Transformation Index (DTI). It comprises three primary components: interviews with clients and experts, an online executive survey and company assessments. The objective is to conduct a comprehensive and multi-dimensional analysis of digital transformation among Chinese companies.

The research encompasses eight key sectors: high tech, industrial, consumer goods and retail, life sciences, new energy, chemicals, banking and insurance, software and platforms.

Survey

The survey was conducted in March 2026, capturing a total sample of 160 valid executive questionnaires.

Enterprise assessment

1 Accenture's China Digital Transformation Index assesses where each company is on its reinvention journey. The Index has three levels spanning six dimensions, 18 business activities and 31 detailed metrics, with scores ranging from 0 to 100.

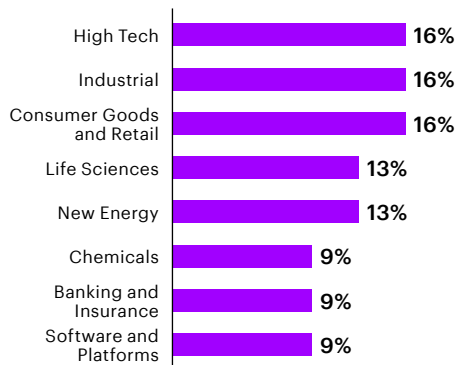
2 Accenture identifies three core capabilities essential for capturing future value: AI-nativeness, value density and multipolar operations.

3 Enterprise performance is measured through a composite index that integrates both financial and non-financial metrics, including market valuation, growth potential and profitability, as well as qualitative indicators, such as industry leadership and customer equity.

To ensure cross-industry comparability, we standardize variables using intra-industry Z-scores (mean=0, standard deviation=1), so that results reflect a company's relative position within its industry rather than absolute levels. We then apply multiple regression analysis to assess the magnitude and pathways through which different capabilities impact performance.

The assessment of corporate reinvention progress draws on self-reported data, IT spending and ESG metrics. IT spending data is sourced from IDC, ESG data from the Arabesque S-Ray database and financial data from S&P Global Capital IQ.

Industry Coverage



Note: Percentages in the chart have been rounded to the nearest whole number and may not total 100%.

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