

BUSINESSGPS

THE CAPABILITY BRIEF

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Accenture's CFO says its AI efficiencies will be used three ways, and gives no figure for clients' share. Ask your integrator where your share is written.

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On 14 October 2026, at Accenture's investor day, its Chief Financial Officer, Angie Park, said Accenture "will use our efficiencies from AI enabled productivity in three ways: passing value to clients, reinvesting the majority of what we retain into growth, and continuing to expand operating margin every year." She gave no figure for the share that reaches clients, and no mechanism. She also said "In FY26, our revenue per person increased approximately 5%, which was in part due to the efficiencies in how we deliver our services"; that is Accenture's own measure of its own year, not a measure of AI's effect, and it says nothing of any client's price.

We think the efficiency an integrator's AI creates now sits, by Accenture's own account, between an integrator and its client, and the contract decides where it lands.

This page gives you one question for your integrator and one clause to find.

Accenture said where its AI efficiency goes, three ways, and gave no share for its clients

Date	Speaker	What was said	What it gives for a client's share
14 October 2026	Angie Park, Chief Financial Officer, Accenture	"we will use our efficiencies from AI enabled productivity in three ways: passing value to clients, reinvesting the majority of what we retain into growth, and continuing to expand operating margin every year."	None stated
14 October 2026	Julie Sweet, Chair and Chief Executive, Accenture	"And so we have to work through some of our existing contracts."	None stated
14 October 2026	John Walsh, Chief Executive Officer, Americas, Accenture	"Even in cases where it is reducing the total revenue that we would get in that contract, the savings that we create gets reinvested somewhere else." He went on to say Accenture helps clients apply the savings "to create more growth or more differentiation elsewhere"; he spoke of savings from offshoring, cloud, software and AI, not of AI alone.	None stated
15 October 2026	Aparna Iyer, Chief Financial Officer, Wipro, on Wipro's own contracts, in answer to an analyst's question on price deflation	"Typically, our contracts are about 2 to 2.5 years in terms of the average tenor", so "a lot of the contracts that we've had have been refreshed and renewed."	None stated

"The majority" in Park's sentence is of what Accenture retains, not of the whole efficiency.

The column "What it gives for a client's share" records what the speaker did not say.

Park's sentence is Accenture's statement of intent for FY27 to FY29, "over this time period" in the transcript's words, and it names no client. Accenture's Chief Executive for Europe, the Middle East and Africa, Mauro Macchi, gave one example, of one unnamed life-sciences client, where Accenture decided to "share the value with the client."

We expect Cognizant, reporting its third-quarter results on Thursday 29 October 2026, to give no figure for the share of its AI efficiency that reaches a client's price. We are wrong if it gives one.

Price what a small gain in delivery puts in play on your contract

With illustrative figures, a programme contract of £8,000,000 a year that became 4% more efficient in delivery (an example figure, not Accenture's) leaves £320,000 a year sitting somewhere between your integrator and you.

For your own figure, use your contract's annual value. The rate is what to ask your integrator for.

Ask your integrator what share reaches you, and where it is written

At your next contract review, ask:

Of the AI efficiency in our contract, what share reaches our price, our scope or our own people, and where is that written?

A useful answer names a clause. "It is reinvested" is an answer only if it says where.

If you pass this to your programme lead, the first question back is likely to be who it lands on. This week's Way Pointer, written for programme leads, has a head start on it: HCLTech, Accenture and McKinsey each named the forward-deployed engineer between 12 and 16 October, and the piece gives the page that puts a name of yours beside each engineer placed in your systems, with hours and cover: the Way Pointer at capability.ai/blog/a-name-beside-every-engineer.

Write down the clause that says where efficiency in delivery goes

Find the clause in your contract that says where efficiency in delivery goes: to your price, to your scope, or nowhere stated. If there is none, write a dated note that says so. Beside it, write the name of the person on your side who raises it at the next contract review, and the date of that review. Wipro's CFO puts Wipro's own contracts at 2 to 2.5 years on average. If yours was signed two or three years ago, check when it renews: that is the place to raise it.

Done when: you hold the clause reference or the dated note, a name, and the date of the review.

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Sources

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