

Navigating Resilience

Key Macroeconomic Insights for the Software & Platforms C-suite

The current situation for Software & Platform companies

Risks for inflation, GDP decline, and recession are increasing, leading to higher household costs and consumer anxiety.

0.8–2.8%	50.8	-0.3–3.9%	-1.3%
Potential increase in US inflation	Consumer Sentiment (May) declined to second lowest on record	Predicted change in GDP growth forecast	Potential impact to S&P growth rate

Sources: Accenture Ready for resilience: how to navigate the new tariff landscape, April/May 2025

Top CEO concerns

Tariffs impact & global trade – US tariffs remain high (~25%), with China facing >125% tariffs, causing trade friction, retaliation, and supply chain risks, accelerating de-globalization.

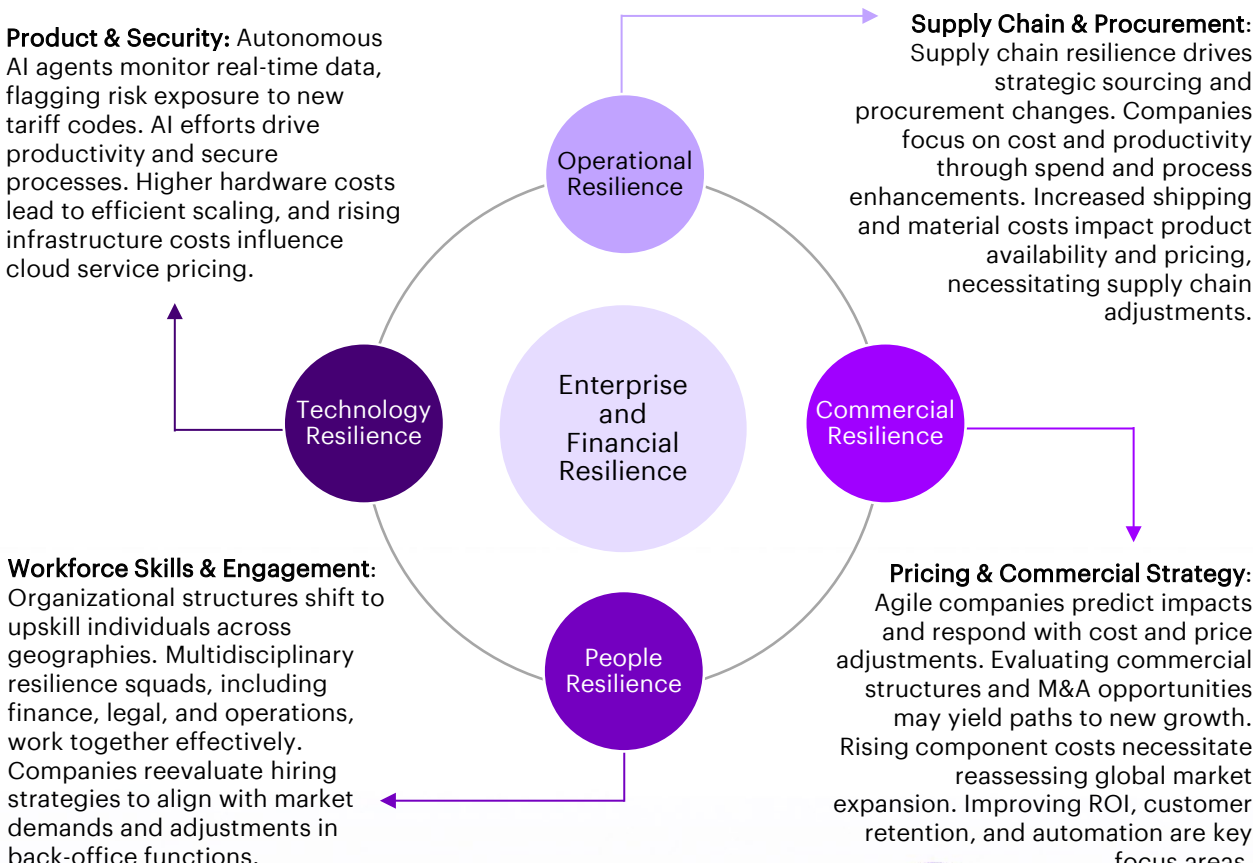
Antitrust and regulation – Big Tech faces global antitrust enforcement and increased scrutiny on platform moderation, content liability, AI safety, and model governance, requiring proactive solutions.

Government efficiency – New US administration cuts federal spending but offers opportunities for federal IT system upgrades, with procurement and investment incentives aligned with administration goals.

Strategic tech & industrial policy – Increased defense spending and geopolitical focus create tech opportunities in secure communications, AI/ML, and cybersecurity, while trade friction pressures firms to invest domestically or in allied locations.

What makes a resilient enterprise?

Resiliency will be the key differentiator for companies who can navigate this uncertain economic and policy environment – this covers commercials, operations, people, and technology. Scenario planning is a critical to building enterprise and financial resilience.



Resilience for competitive advantage today and tomorrow

Resilience across these dimensions is the key to responding to the uncertain economic and policy environment ahead. Consider no regret moves that will yield value regardless of how the tariff environment evolves.

	What to do Now	What to do Next
Enterprise & Financial Resilience	Rapid scenario planning to surface areas of the business impacted by tariffs and optionality on actions to take now and in the future	Stress-test initiatives, enhance cost control, engage policymakers, and explore M&A opportunities
Operational Resilience	Build supply chain resilience by quickly diversifying away from markets likely to have high tariffs over the long term	Leverage agentic technologies to model long-term impacts on infrastructure and establish agile processes
Commercial Resilience	Exploit growth opportunities presented by softening in markets (e.g., digital advertising) for which a strong competitive position exists	Diversify sourcing (including partnerships), evaluate regional costs, and adapt product strategies
People Resilience	Track evolving government programs related to reindustrialization and AI leadership to assess eligibility and ensure strategic alignment	Establish flexible processes for resilient budgeting and resource adjustments
Technology Resilience	Proactively address regulation risk in products and business structures across bundling, API access, data usage, default settings, and marketplace rules	Further scrutinize platform rules, leverage infrastructure, and re-evaluate product and service delivery and support requirements

To learn more about how to turn resilience into a competitive edge visit:

<https://www.accenture.com/us-en/insights/strategy/navigating-new-tariff-landscape-economic-impact>

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