

#### accenture

### **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%

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Potential increase in US inflation 50.8

Consumer
Sentiment (May)
declined to
second lowest on
record

-0.3-3.9%

Predicted change in GDP growth forecast -1.3%

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

content liability, AI safety, and model governance, requiring proactive solutions.

Government efficiency – New US administration cuts federal

enforcement and increased scrutiny on platform moderation,

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.

### Resiliency will be the key differentiator for companies who can navigate this

What makes a resilient enterprise?

uncertain economic and policy environment – this covers commercials, operations, people, and technology. Scenario planning is a critical to building enterprise and financial resilience.

Operational

Resilience

Enterprise

and

Financial Resilience

People

Resilience

tariff codes. Al efforts drive productivity and secure processes. Higher hardware costs lead to efficient scaling, and rising infrastructure costs influence cloud service pricing.

Technology Resilience

Product & Security: Autonomous

Al agents monitor real-time data,

flagging risk exposure to new

geographies. Multidisciplinary resilience squads, including finance, legal, and operations, work together effectively. Companies reevaluate hiring strategies to align with market demands and adjustments in back-office functions.

Workforce Skills & Engagement:

Organizational structures shift to

upskill individuals across

focus on cost and productivity
through spend and process
enhancements. Increased shipping
and material costs impact product
availability and pricing,
necessitating supply chain
adjustments.

Commercial
Resilience

Supply Chain & Procurement:

Supply chain resilience drives

procurement changes. Companies

strategic sourcing and

structures and M&A opportunities may yield paths to new growth. Rising component costs necessitate reassessing global market expansion. Improving ROI, customer retention, and automation are key focus areas.

**Pricing & Commercial Strategy:** 

Agile companies predict impacts

and respond with cost and price

adjustments. Evaluating commercial

## economic and policy environment ahead. Consider no regret moves that will yield value regardless of how the tariff environment evolves.

Resilience for competitive advantage today and tomorrow

Resilience across these dimensions is the key to responding to the uncertain

What to do **Now** What to do **Next** 

Financial
Resilience

areas of the business impacted by tariffs and optionality on actions to take now and in the future

policymakers, and explore M&A opportunities

cost control, engage

Operational Resilience

**Enterprise &** 

Build supply chain resilience by quickly diversifying away from markets likely to have high tariffs over the long term

**Exploit growth opportunities** 

Rapid scenario planning to surface

to model long-term impacts on infrastructure and establish agile processes

Leverage agentic technologies

Stress-test initiatives, enhance

Resilience

**Commercial** 

presented by softness in markets (e.g., digital advertising) for which a strong competitive position exists

partnerships), evaluate regional costs, and adapt product strategies

Establish flexible processes for

Diversify sourcing (including

Resilience

**People** 

Track evolving government programs related to reindustrialization and Al leadership to assess eligibility and ensure strategic alignment

resilient budgeting and resource adjustments

Resilience

**Technology** 

Proactively address regulation risk in products and business structures across bundling, API access, data usage, default

Further scrutinize platform rules, leverage infrastructure, and re-evaluate product and service delivery and support

access, data usage, default service delive settings, and marketplace rules requirements

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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