Resilience Redefined

From readiness to reinvention

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Introduction

The foundations of global trade are being redrawn by a new era of barriers, tariffs and systemic volatility.

Over the past five years, companies have endured a cascade of disruptions—from pandemics and war to supply chain breakdowns and economic dislocation.

What once appeared as isolated crises now form a continuous backdrop. Fragmentation is accelerating, geopolitical risk remains elevated and policies shift with little warning. Uncertainty itself is becoming more uncertain. Volatility is no longer episodic—it's structural. In this context, resilience is no longer optional but is critical for sustainable, long-term profitability.

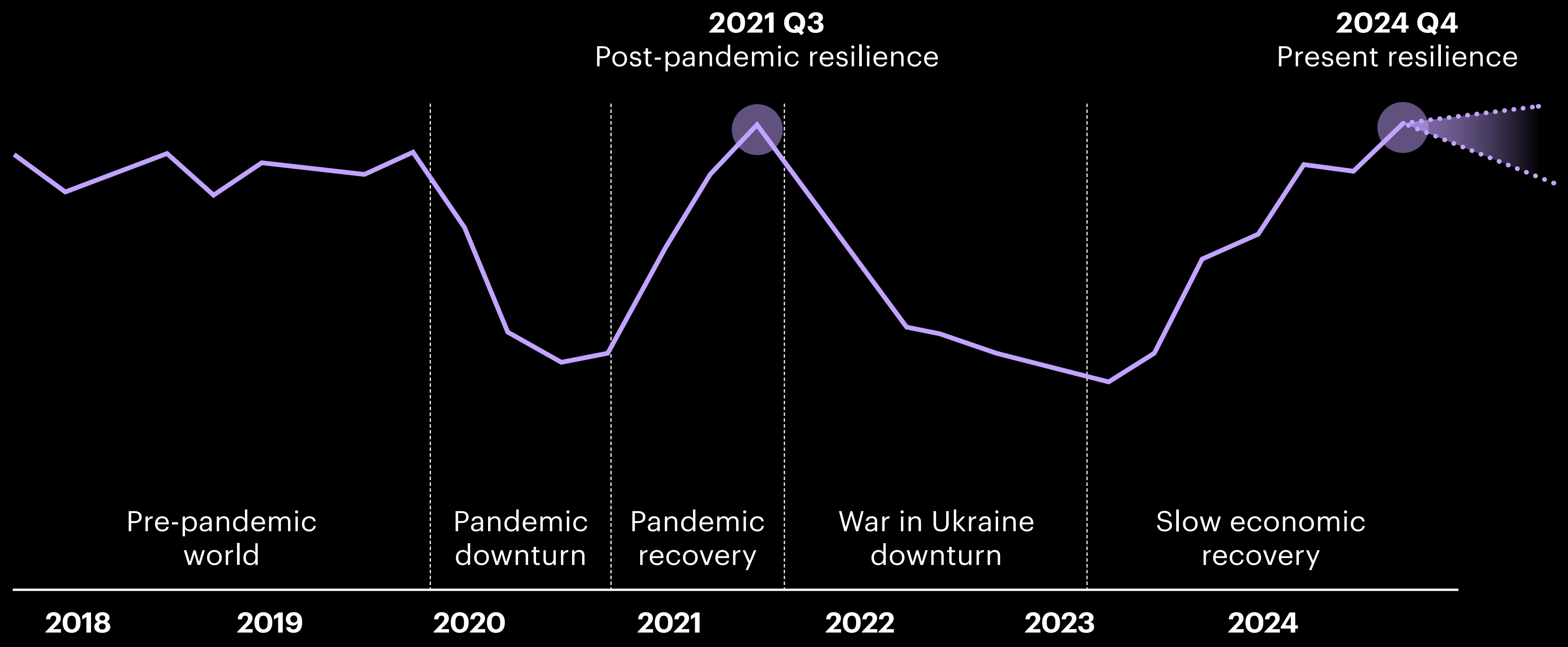
Understanding the challenge, leaders have responded decisively. From cybersecurity to data infrastructure, boardrooms have doubled down on risk-readiness.

At first glance, these efforts appear to be paying off. Our Accenture Resilience Index shows resilience scores overall across all companies studied rebounding to post-pandemic highs (see Figure 1).

But today, true resilience demands more than traditional risk management. We define resilience as a company's ability to withstand and adapt to uncertainty and volatility, and to emerge stronger by building the capabilities needed for long-term, profitable growth.

Figure 1: Strong on the surface: Resilience is back at peak levels

Accenture Resilience Index



Source: Accenture Research.

The Accenture Resilience Index

A proprietary global benchmark framework that evaluates companies' performance and uncovers the link between the strength of their capabilities and their ability to grow profitably. The index, which spans more than 1,600 companies from around the world, captures a company's percentile position within its industry peer set. These positions are evaluated based on several capabilities including financial and business strength—which includes strengths associated with commercial, people, operational, sustainability (environmental, social and governance) —and technology strength. A company's overall Resilience Index score is the average of its financial, business and technology strength. For more on this research see *How to Grow Your Return on Business Resilience | Accenture.*

And a closer look at the Index findings reveals that the big picture is masking deep individual vulnerabilities. The very capabilities that enable organizations to adapt and perform under pressure are quietly eroding. A paradox is emerging. While companies overall appear more resilient, a granular examination reveals fractures, misalignment and stagnation on the rise.

First, resilience is fracturing. The divide between strong and weak organizations is widening, with the latter falling further behind. On the Resilience Index, the performance gap has expanded by 17 percentage points.

Second, resilience is becoming misaligned. Many companies are investing in certain capabilities while neglecting others, creating dangerous exposures where it matters most. Top performers, for example, have boosted technology resilience by 3% but cut investment in people resilience by 7% compared to pre-pandemic levels.

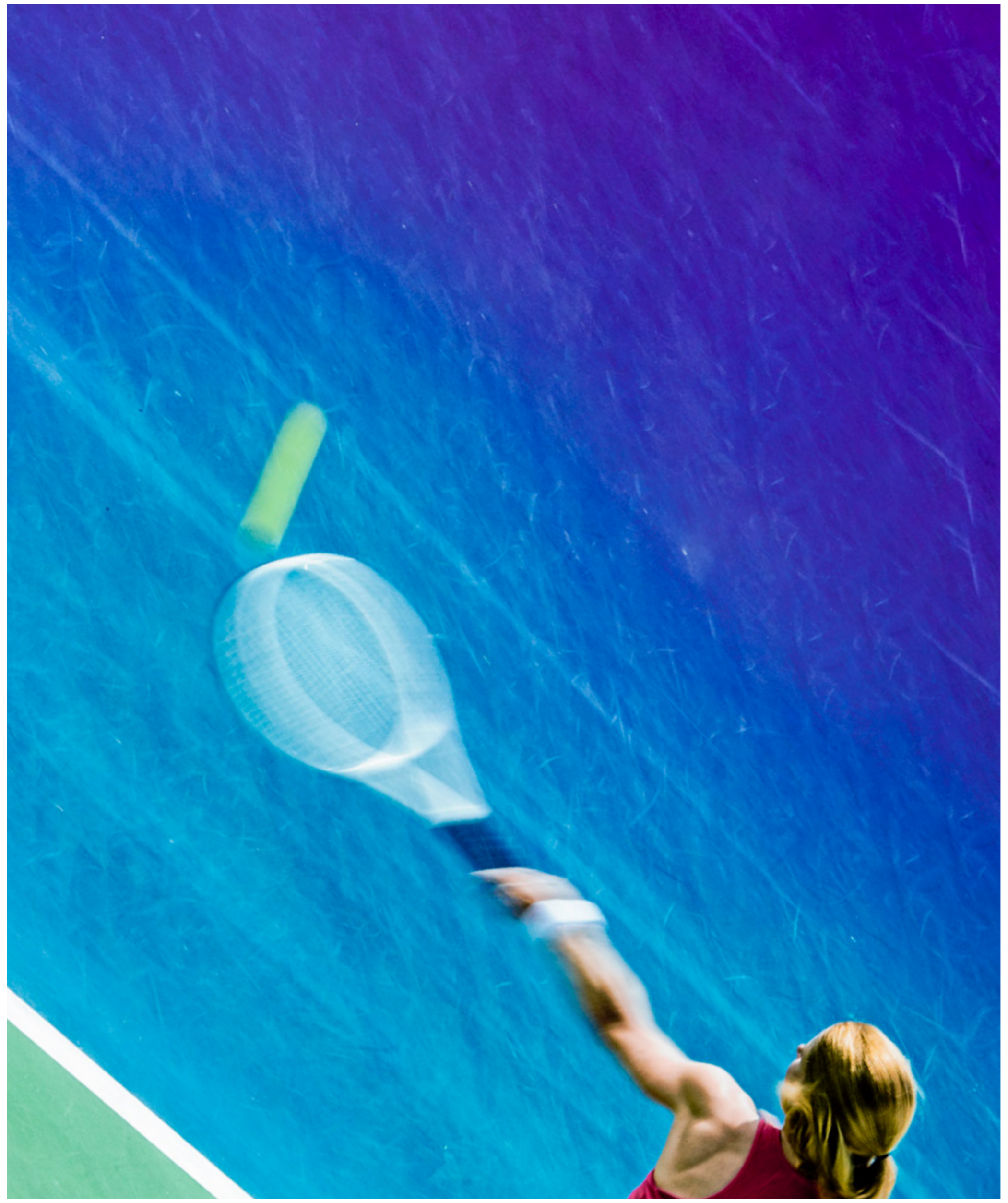
Third, resilience is stagnating. As the very meaning of resilience evolves, too many companies remain anchored to outdated playbooks. The capabilities that now define resilience—agentic AI, AI-workforce integration and operational optionality—were barely on the radar five years ago.

Our research quantifies what many leaders intuitively understand: Resilience delivers its greatest value in times of disruption. Truly resilient organizations consistently outperform their peers during high-stress periods, delivering superior Return on Resilience (RoRes)—further positioning them for reinvention. We define a company's RoRes as its expected revenue growth and profit margin three years into the future and relative to the revenue growth and profit margins of the median company in its industry. Highly resilient companies grow revenues 6 percentage points faster than their low resilient peers and have profit margins that are 8 percentage points higher.

In our latest simulations, we tested how companies respond to severe shocks. The results were clear. Sixty percent of top quartile performers on the Resilience Index achieved profit gains, compared to just 21% in the bottom quartile after a severe shock. These vulnerabilities are deepening as risks increasingly collide—from tariffs and supply chain shocks, to regulatory shifts, cyber threats and extreme weather events—often compounding their impact. In this climate, the sheer scale and volatility of disruption aren't just challenging operations—they're redrawing the competitive landscape.

The conclusion is clear. Resilience must be reinvented. Most companies treat resilience like a mattress, using it to passively soften the landing and minimize discomfort. In reality, resilience is more like a trampoline—a dynamic platform that doesn't just absorb impact but uses it to generate upward momentum. Instead of simply protecting value, it creates it.

The future belongs to companies that embrace **adaptive resilience,** using volatility as a catalyst for reinvention to unlock competitiveness and reshape how organizations navigate strategy, decision-making and investment. Those companies that outperform during times of volatility do so not just because of what they've invested in, but because of how they approach resilience—not as a static safeguard, but as a dynamic, evolving capability.



Fractured resilience: Gap widening, leaders surging

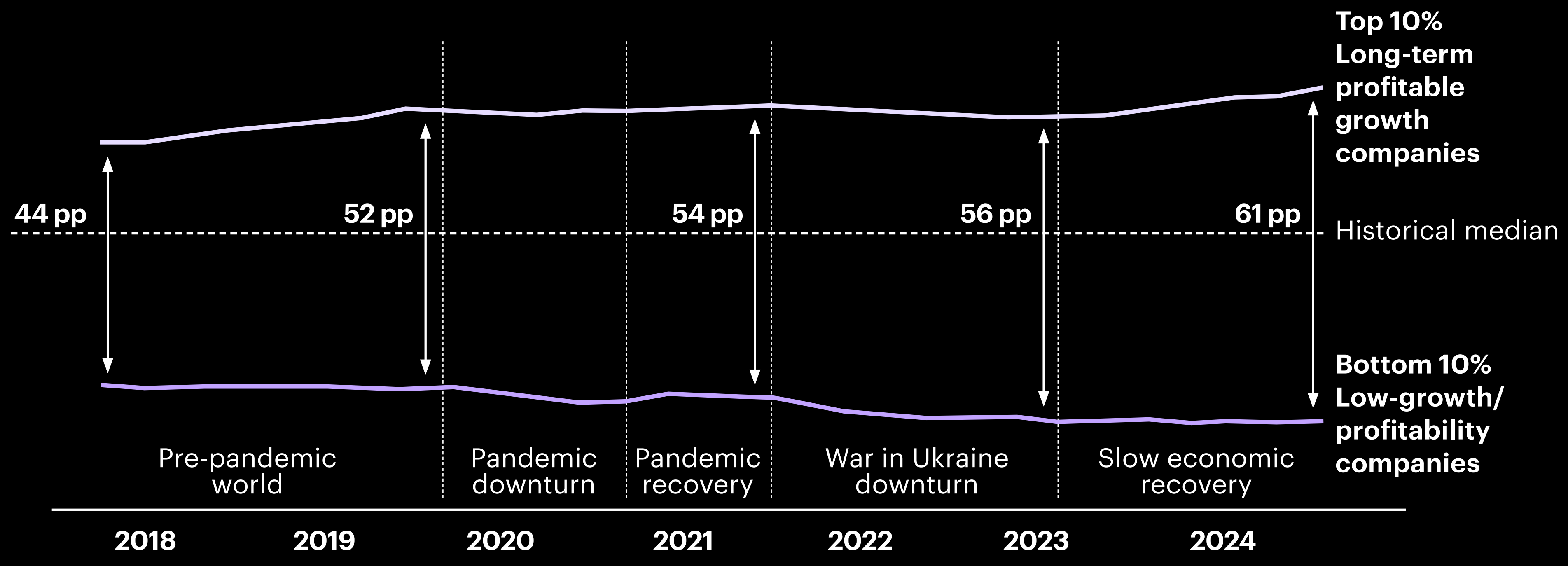
Our research has found that less than 15% of companies consistently achieve long-term profitable growth, with one key trait setting them apart—their ability to thrive in times of disruption.

High-performing companies (those that achieve long-term profitable growth) consistently score higher on the Accenture Resilience Index (see About the Research: Accenture Resilience Index). Today, the gap between high performers and low performers is widening further (see Figure 2), suggesting that returns on resilience are compounding over time.

Meanwhile, many weaker companies remain anchored in outdated operational models, struggling to adapt in an increasingly volatile environment. As a result, they are seeing a widening gap in both profitability and market share, unable to match the adaptability and strength of their more resilient peers.

Figure 2: High-performing companies stay strong through disruptions and emerge ahead

Accenture Resilience Index
Average company percentile position of group relative to industry historical median



Source: Accenture Research.

Misaligned resilience: A patchwork, not a system

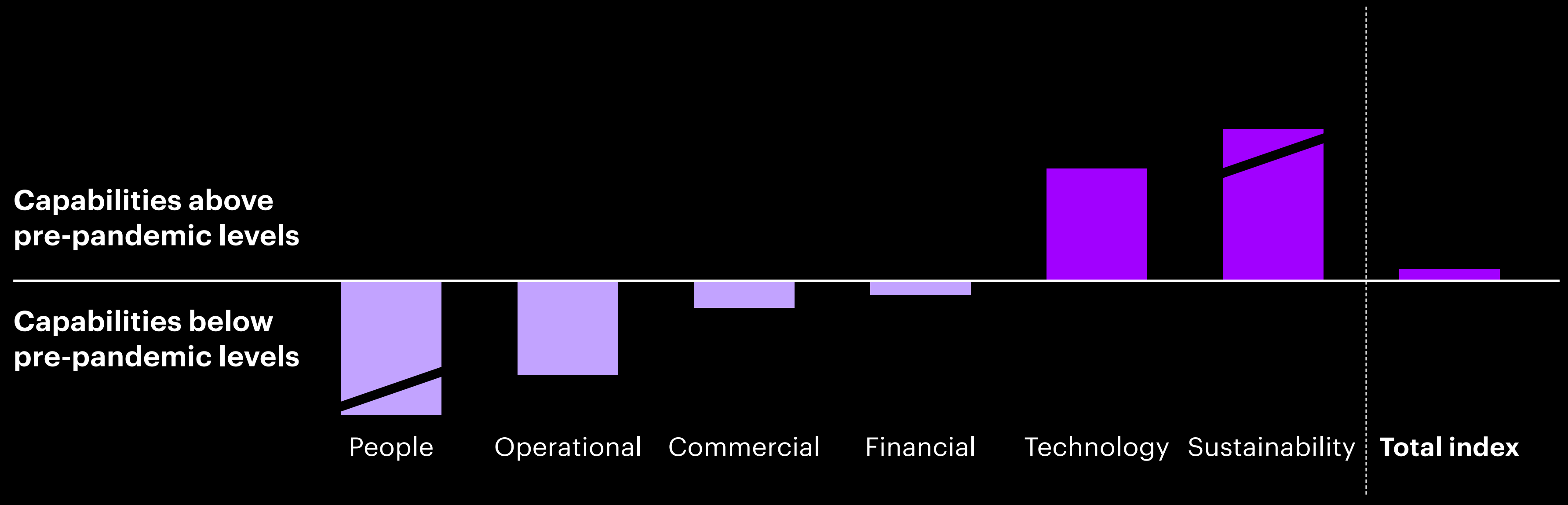
Over the past several years, we've been tracking how organizations are responding to sustained disruption through the Accenture Resilience Index. Since the pandemic, resilience has been tested repeatedly—while the global economic landscape has only grown more volatile.

On the surface, the picture looks promising. Technology and sustainability resilience initiatives are in motion, and financial resilience has stabilized, albeit lightly below pre-pandemic levels (see Figure 3). But beneath this surface progress lies a troubling reality—a patchwork of isolated improvements, rather than a cohesive system of resilience. Only 4% of companies that have improved their resilience in the recent recovery are advancing across all dimensions—clear evidence that resilience is becoming more fragmented than in past recoveries.

Resilience built in silos is fragile. Strengthening one part of the organization while leaving others exposed creates only the illusion of preparedness. True resilience demands a coordinated, enterprise-wide approach—the ability to stretch, pivot and adapt under pressure—as a unified system.

Figure 3: Misaligned momentum: Selective strengths, hidden vulnerabilities

Changes in the Accenture Resilience Index by capability
2024 Q4 vs. pre-pandemic average (2017Q4-2019Q4)



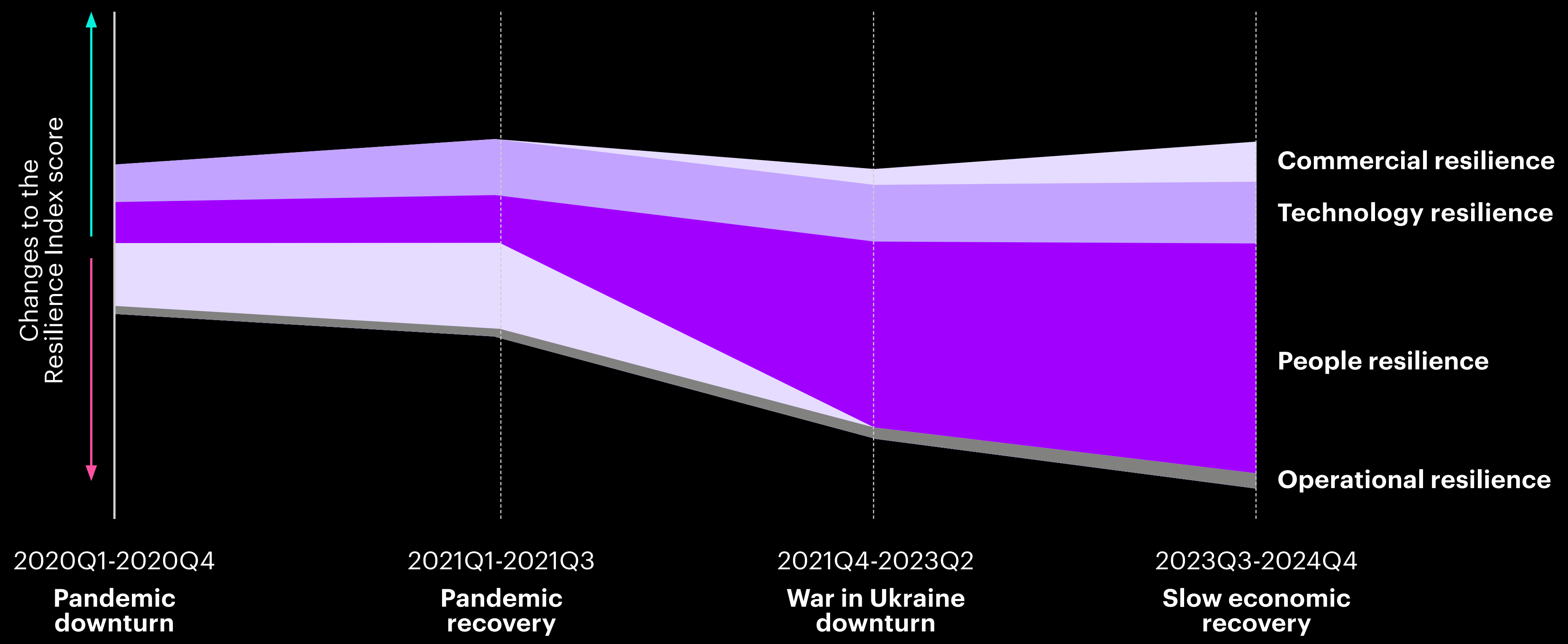
Note: The scale has been adjusted for accessibility.

Source: Accenture Research.

In our related research, Navigating the new tariff landscape and its economic impact, we identify four core capabilities that most directly drive enterprise resilience during disruption: technology, commercial, people and operations. Today, the greatest vulnerabilities are emerging in people and operational resilience, which are the foundational layers of adaptability and execution (see Figure 4).

Figure 4: The great vulnerability build up

Accenture Resilience Index: Contribution by core capability



Source: Accenture Research.

Technology resilience:

Building the base for reinvention

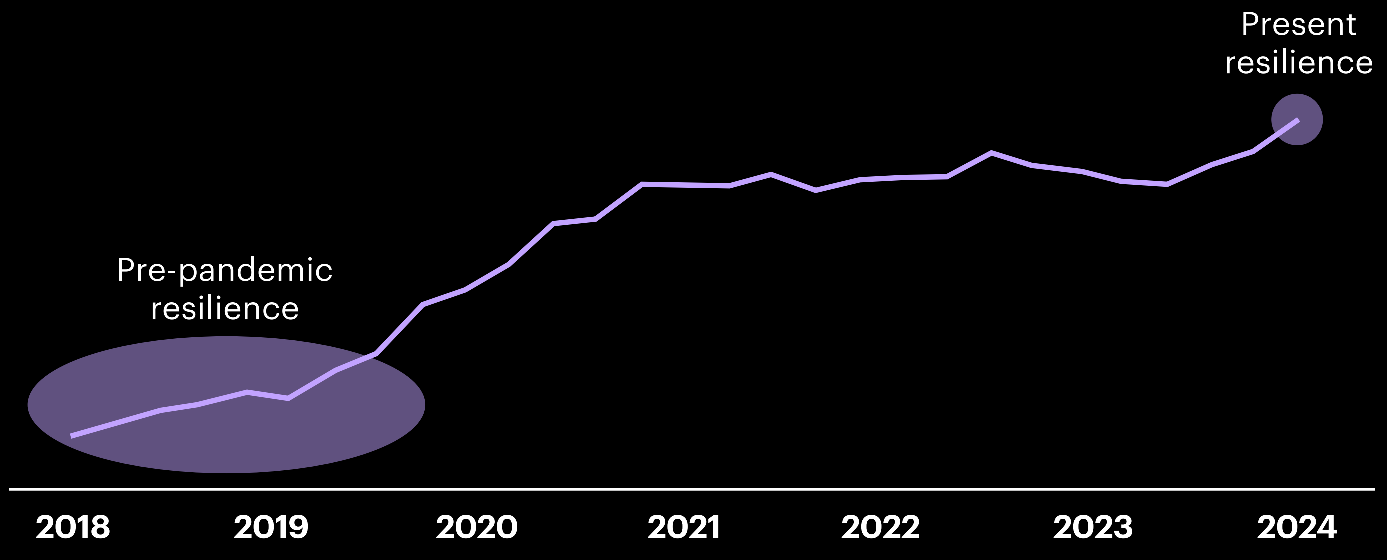
Since the pandemic, technology resilience has become a top strategic priority for business leaders. With rapid advances in new technologies, growing economic uncertainty and rising geopolitical risks, companies are steadily increasing their technology investments (see Figure 5).

In our Resilience Index, stronger performance in this area is driven by a greater focus on accelerated AI and data capabilities and cybersecurity. Our latest CEO survey confirms that momentum. Eighty five percent of CEOs plan to increase investments in gen AI in 2025 compared to 2024, reflecting the urgency to keep pace with innovation.

Next-generation AI is also moving fast. Agentic architecture, networks of AI agents that go beyond automating routine tasks to orchestrating entire business workflows, is gaining momentum. Three times as many organizations expect to invest in these capabilities in 2025 than in 2024, marking a clear shift toward using advanced AI for long-term competitive advantage.[1] Technology investment is essential to future-proof operations to include addressing increasing tech sovereignty risks, but it's only the first step toward the broader reinvention that next-generation resilience demands.

Figure 5: **Technology resilience becomes non-negotiable**

Accenture Resilience Index – Technology



Source: Accenture Research.

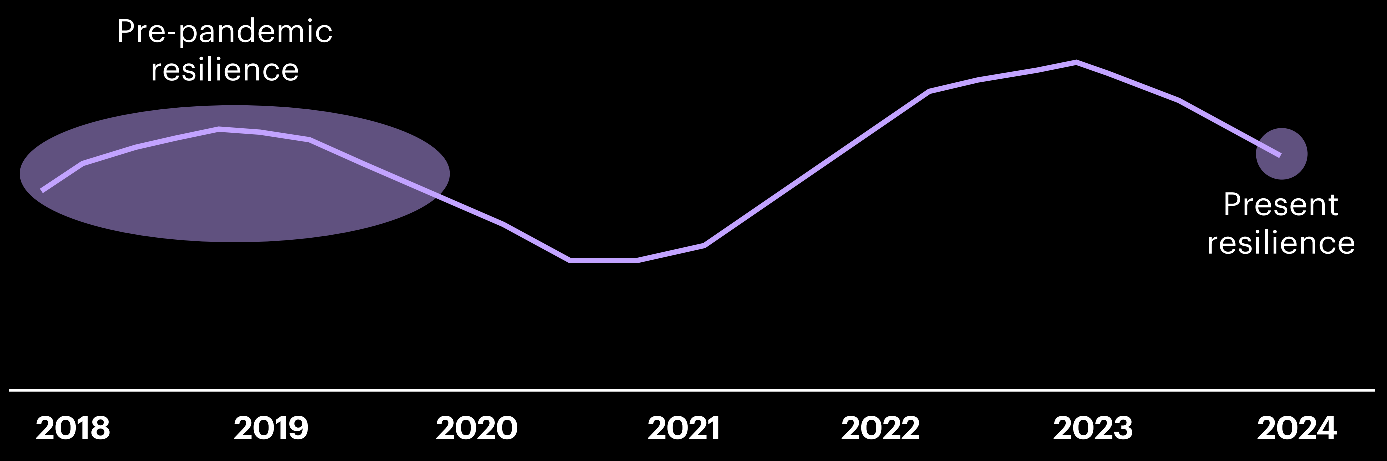
Commercial resilience:

Balancing cost pressure and pricing power

This dimension reflects real-time economic realities. Rated as neutral for now (see Figure 6), commercial resilience is under immediate pressure as companies face rising tariffs, increasing input costs and fluctuating demand. Organizations are being forced to make quick, strategic decisions about which costs to absorb and which to pass on. Getting that balance wrong can directly impact both profitability and customer loyalty.

Figure 6: Commercial resilience holds

Accenture Resilience Index – Commercial



Source: Accenture Research.

People resilience:

Undervalued and undercut

In the race to adopt gen AI and agentic technologies, many organizations are prioritizing technology investments without a parallel focus on people—a strategy that leaves them exposed. Without employees to interpret, apply and scale these tools, organizations risk automating the past rather than inventing the future.

Our Making reinvention real with gen AI research reveals a stark imbalance. Organizations are allocating three times more of their gen AI budgets to technology than to people. The consequence is clear—people resilience is eroding.

This imbalance is particularly dangerous under pressure. But it also offers a clear advantage to those who act. Organizations that invest in both people and technology create a resilient layer of human judgment and insight that keeps essential functions running smoothly under pressure. This combination doesn't just protect performance. It amplifies it. Our research shows that companies that strengthen both talent and technology are four times more likely to achieve long-term profitable growth.

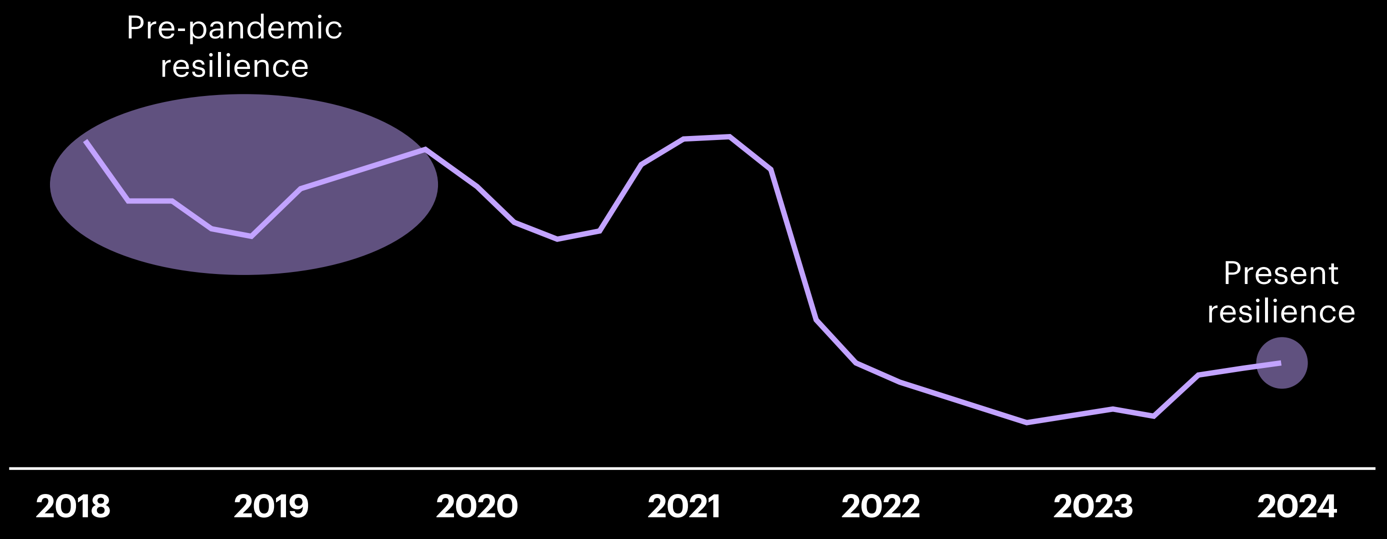
Although there are early signs of recovery, people resilience remains well below pre-pandemic levels (see Figure 7). Companies have made strides in building new skills, but the aftershocks of the Great Resignation[2] linger, with organizations facing ongoing challenges in attracting talent and managing high turnover.

Still, disruption breeds opportunity. Our research shows that companies reframing productivity as a growth engine and not a cost center are seeing real gains. These companies are growing their revenue faster than their spend, seven percent per employee annually, while only seeing a 6% rise in employee costs.

At the same time, building true resilience increasingly depends on deepening skills through reskilling, upskilling and building technology fluency across the workforce. To fully capture these gains, companies must also reimagine their operating models, blending human and machine strengths to redesign workflows, decision-making and ways of working for a new era.

Figure 7: People resilience has dropped sharply since the pre-pandemic period

Accenture Resilience Index – People



Source: Accenture Research.

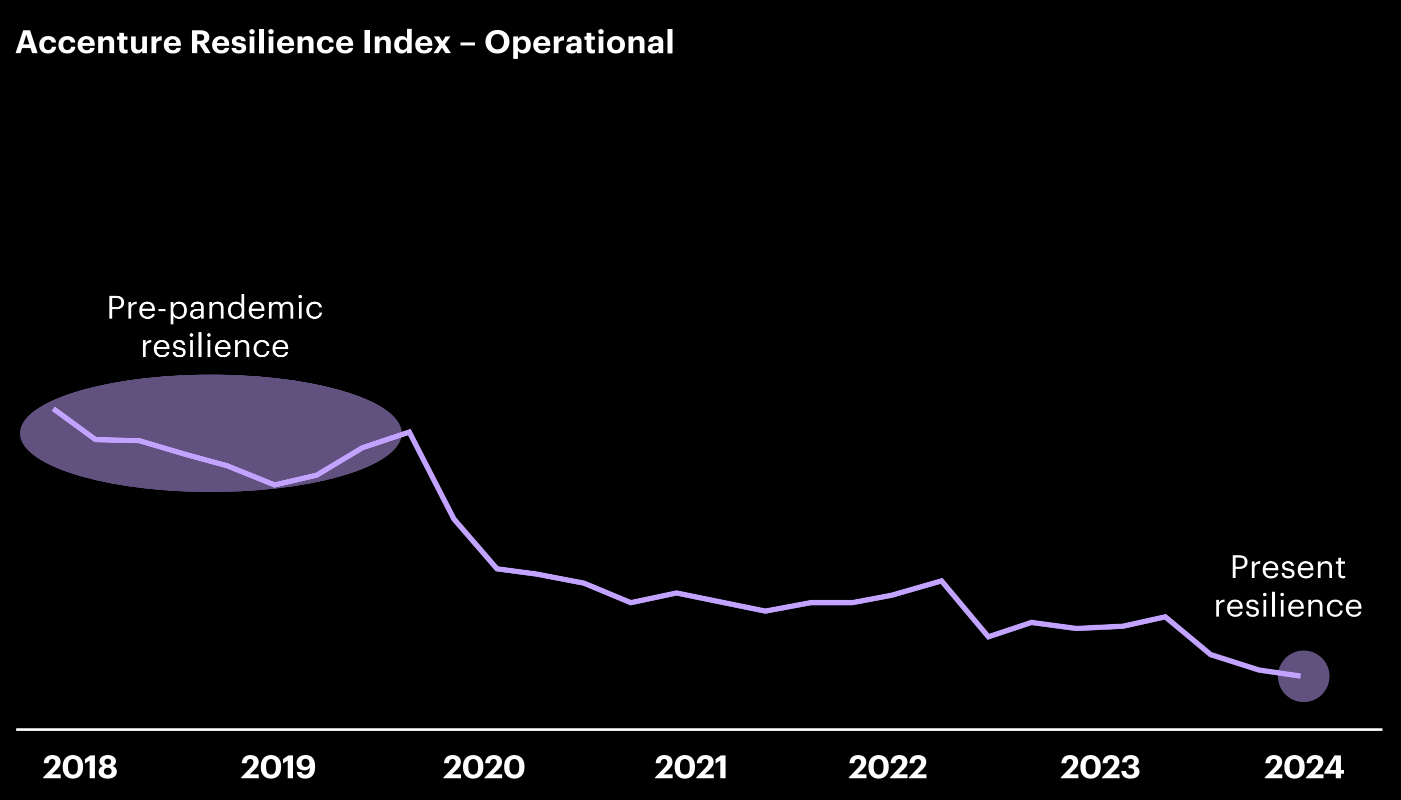
Operational resilience:

A critical blind spot

In a global economy rattled by tariff shocks and trade fragmentation, operational resilience has never been more vital or more vulnerable. Our Resilience Index shows a sustained decline in this capability since before the pandemic (see Figure 8). Ongoing challenges—the war in Ukraine, persistent supply chain disruptions and rising geopolitical complexity—have only intensified the pressure.

For many companies, the weakness is structural. Global footprints may appear diversified, but they often lack true optionality—the real-time flexibility to shift, reroute or reconfigure operations in response to sudden changes. This is the new benchmark for operational resilience and one that many organizations are struggling to meet.

Figure 8: Operational resilience on downward trend



Source: Accenture Research.

Churn is the new constant

91%

of companies in the bottom quartile of operational resilience.

One of the clearest indicators of misalignment between external disruption and companies' insufficient responses, particularly in talent and operational resilience, is performance churn—the extent to which companies rise or fall relative to peers after a crisis. The higher the churn, the more disruption is reshaping the competitive landscape.

Following both the COVID-19 pandemic and the energy shocks of 2024, our Resilience Index recorded sharp increases in churn. Resilient companies surged ahead, while others were left behind.

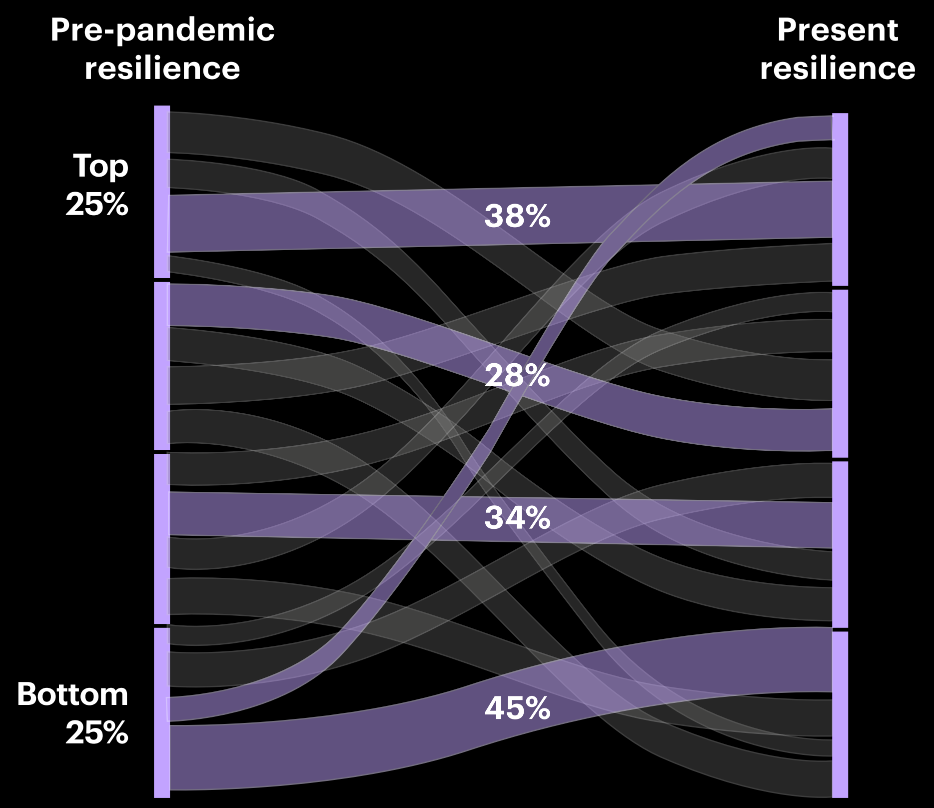
In talent, the churn is dramatic. Before the pandemic, the top-performing quartile in people resilience was relatively stable. Today, only 38% of companies that led in this area before the pandemic have maintained their position (see Figure 9). The rest were overtaken by organizations that actively tackled employee turnover and ramped up employee training. But this shift isn't just about attrition or training budgets; it signals a deeper failure. Many organizations have not reimagined their workforce strategies for a world defined by continuous disruption.

Too many companies are still relying on legacy approaches to talent, standard learning and development programs, static job models and outdated assumptions about skills. Resilience now demands even more. It requires preparing workers to operate alongside AI agents, mastering emerging technologies and adapting continuously to technology-driven ways of working.

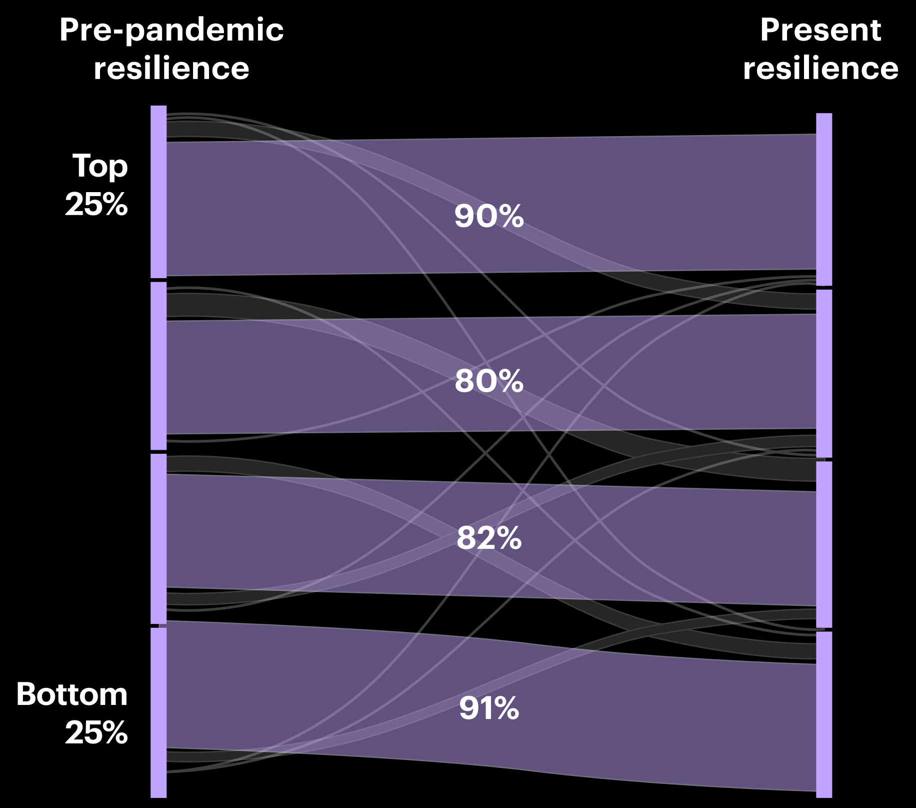
Operational resilience tells a different but equally concerning story. Churn is low not from strength but from stagnation. Ninety-one percent of companies in the bottom quartile before the pandemic remain there today. Rather than evolving, many are still anchored to global operating models designed for cost efficiency, not adaptability. This inertia—despite rising geopolitical risk, tariffs and regional fragmentation—signals that operational strategies have not kept pace with a more volatile world.

Figure 9: **Churning fast and slow**

People resilience
Only 38% of People resilience leaders from before the pandemic are still on top.



Operational resilience
The 91% of Operational resilience laggards from before the pandemic are still at the bottom.



Source: Accenture Research.

The churn data underscores the limits of historical performance as a reliable predictor of future strength. Companies that thrived in stable conditions may lack the structural flexibility to hold their ground in volatile ones. This is especially evident in capital-intensive, globally complex sectors like automotive, high tech and manufacturing, where rigid structures have become liabilities and the ability to adapt quickly is now a defining competitive advantage.

Stagnating resilience: A new baseline emerges

The definition of resilience is evolving rapidly across three of the four core capabilities that most directly drive enterprise resilience during disruption—as new realities reshape what it takes to stay competitive.

In **technology**, resilience now demands far more than simply maintaining robust IT systems. It requires the deep integration of gen AI capabilities into core business processes, the adoption of agentic architectures that enable autonomous decision-making and a shift from reactive digital upgrades to proactive digital transformation. What was a nice-to-have capability just a year ago has become a critical source of strategic advantage—with the speed, scalability and intelligence of technology ecosystems increasingly determining who thrives under pressure.

On the **people** front, resilience is no longer defined by human adaptability alone. It is rapidly becoming about how effectively human and AI agents can collaborate within dynamic, augmented systems. To compete, organizations must move beyond traditional workforce models and adopt talent strategies that enable human-AI teaming, support continuous learning in machine-augmented environments and empower employees to work alongside intelligent agents. Critically, these agents—both human and artificial—are becoming embedded in reinvented operating models, where roles, decision rights and workflows are increasingly adaptive and distributed. The ability to harness and scale machine intelligence through human-AI collaboration is emerging as a defining trait of resilient, high-performing organizations.

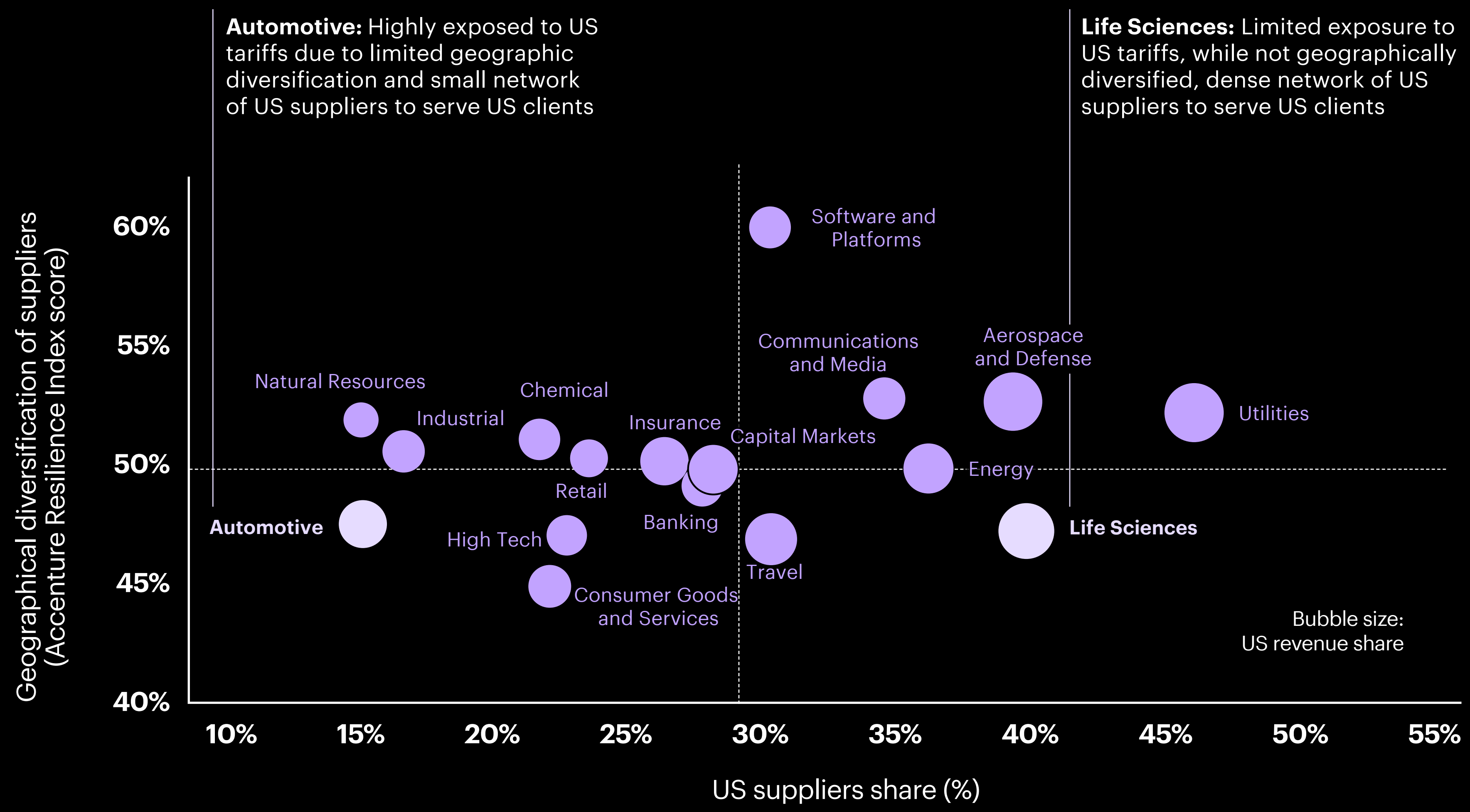
And in **operations**, traditional strategies like broad geographic diversification are losing their effectiveness. With rising tariffs and growing regional fragmentation, true operational resilience now depends less on the size of the footprint and more on strategic optionality—the ability to pivot supply chains, shift production and reconfigure partnerships quickly as conditions change.

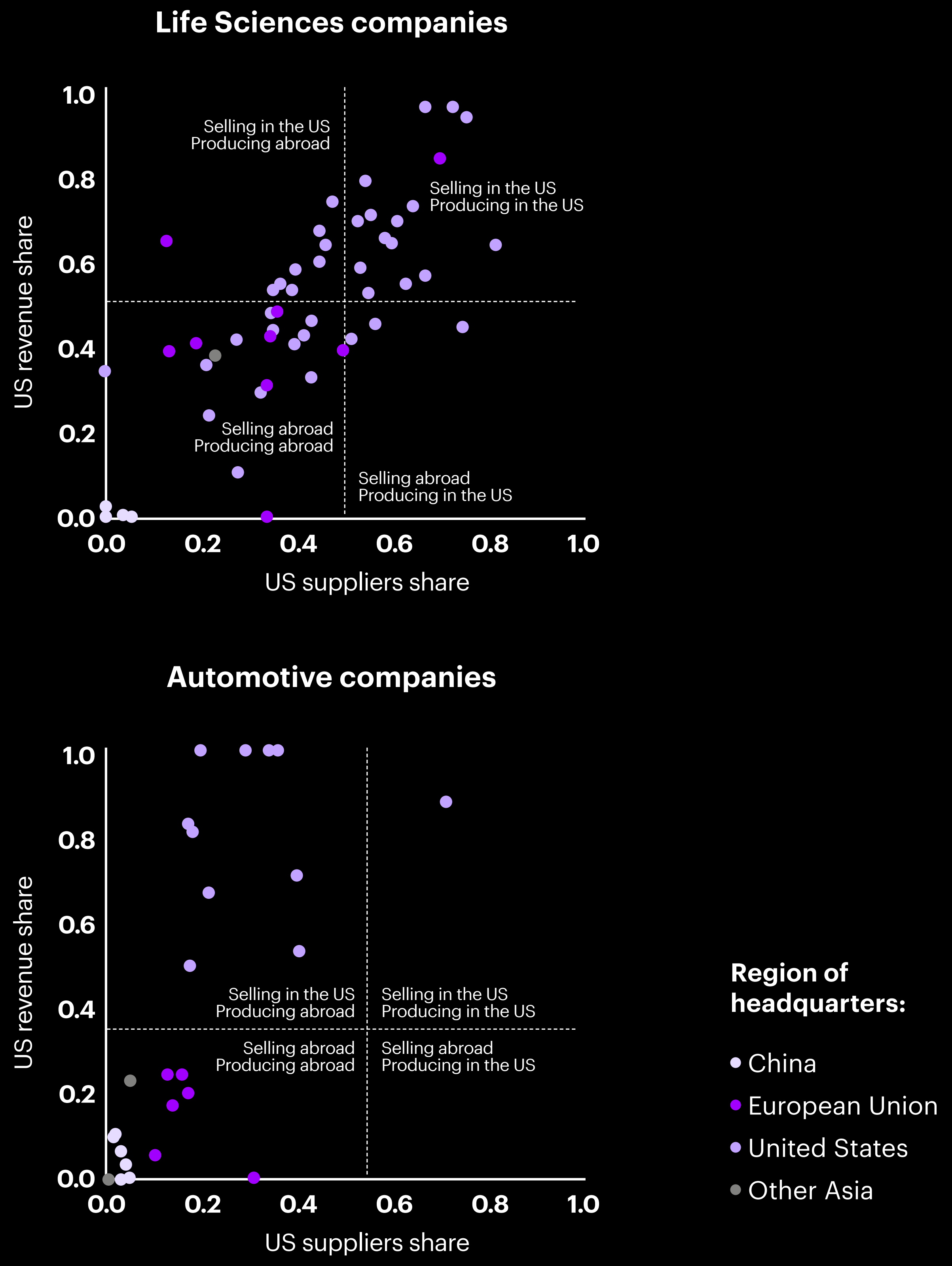
Tariffs have made this vulnerability painfully visible. Many companies designed global operations for cost and efficiency, assuming a wide geographic spread would deliver agility. They locked themselves into specific countries, processes and cost structures. That rigidity is now under strain. Without built-in flexibility, even the most far-reaching supply chains can buckle under disruption.

The uneven effects of US tariff exposure reveal just how much underlying fragility remains. Consider the contrast between life sciences and automotive. Life sciences appears insulated from tariff shocks not because of broad diversification, but because it relies on a concentrated, domestically embedded network of US suppliers serving US clients. Its resilience comes from strategic concentration, not dispersion.

Automotive, by contrast, is heavily exposed. Despite a global footprint, the industry depends on a narrow supplier base and imported components, leaving it vulnerable to cost spikes and supply disruptions when tariffs hit. What looks like diversification often hides a brittle, inflexible supply model (see Figure 10).

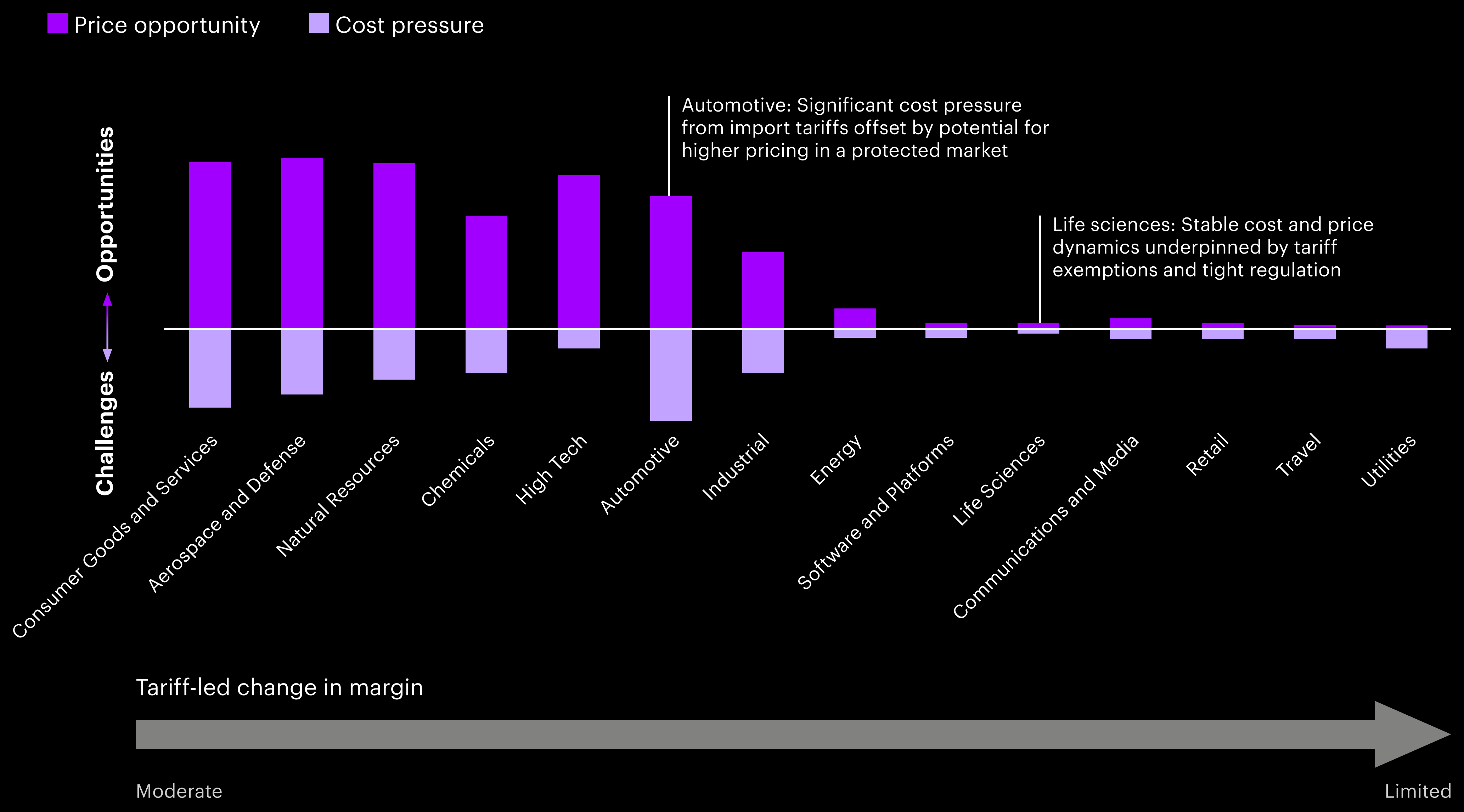
Figure 10: Tariffs are testing operational resilience





Source: Accenture Research.

Figure 11: Cost pressures and tariff revenue potential opportunity vary across US industries



Source: Accenture Research.

With the current tariffs in effect, companies operating in the US must navigate not just market opportunities but a shifting landscape of cross-industry incentives. Some sectors, like life sciences, see minimal cost increases but have little room to raise prices due to existing tariff exemptions and tight regulation. In contrast, automotive players face steeper cost pressures from imported components but can offset these through greater pricing power in a protected market (see Figure 11).

In short, resilience today depends less on scale and more on adaptability. Yet many organizations are still operating with yesterday's models in today's world, a dangerous disconnect.

Adaptive resilience for a new era

The resilience paradox is more than a warning sign. It's a turning point.

It reminds us that surface strength can mask hidden fragility and that in a world defined by disruption, the true competitive edge lies in adaptability.

Adaptive resilience treats volatility not as a constraint, but as fuel, transforming instability into momentum through four key shifts.

First, it reframes volatility as a strategic advantage. Leading organizations treat uncertainty as a signal to act, not pause—an invitation to rewrite the rules, move decisively and harness disruption to drive growth and productivity.

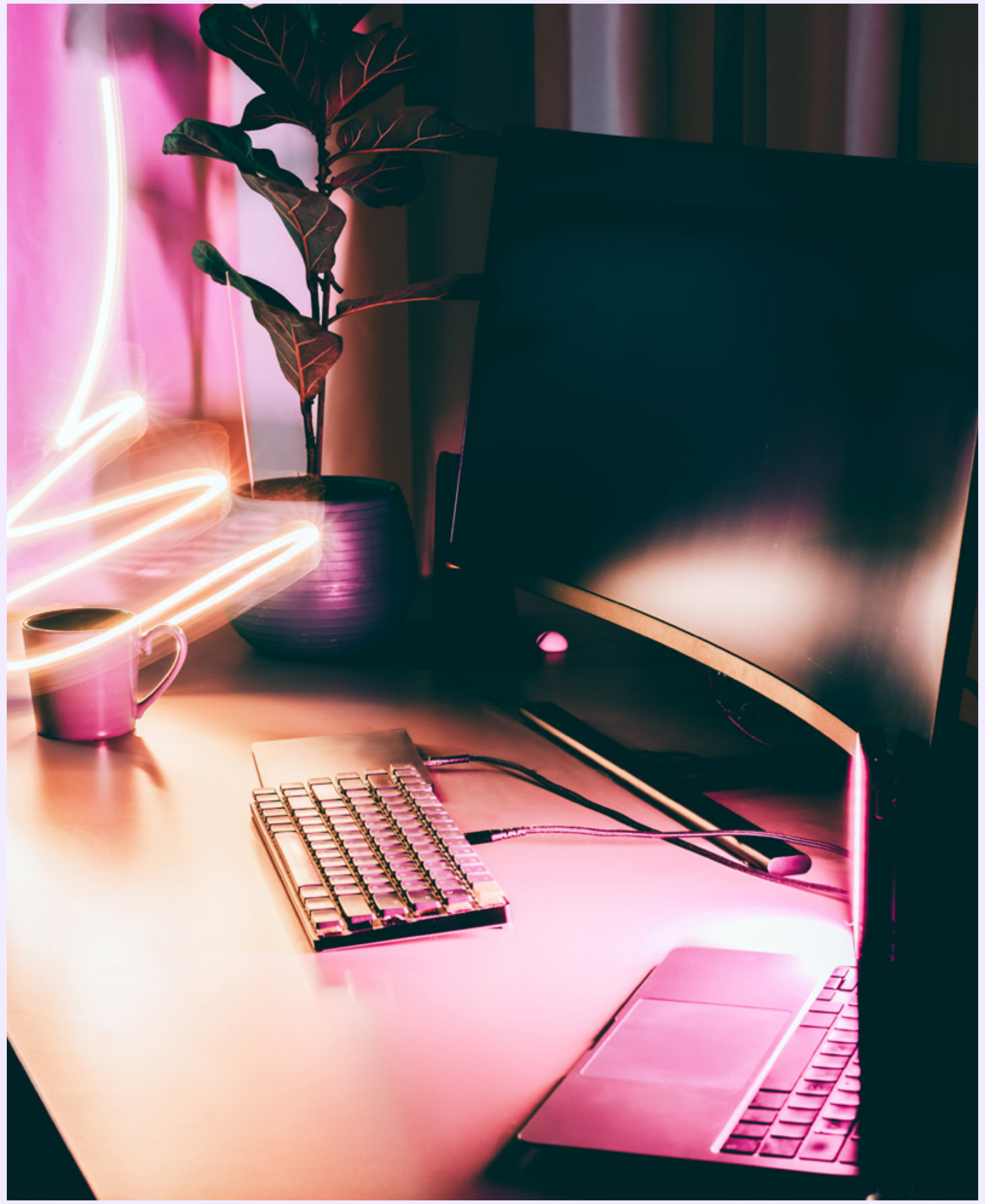
Case Study | Microsoft

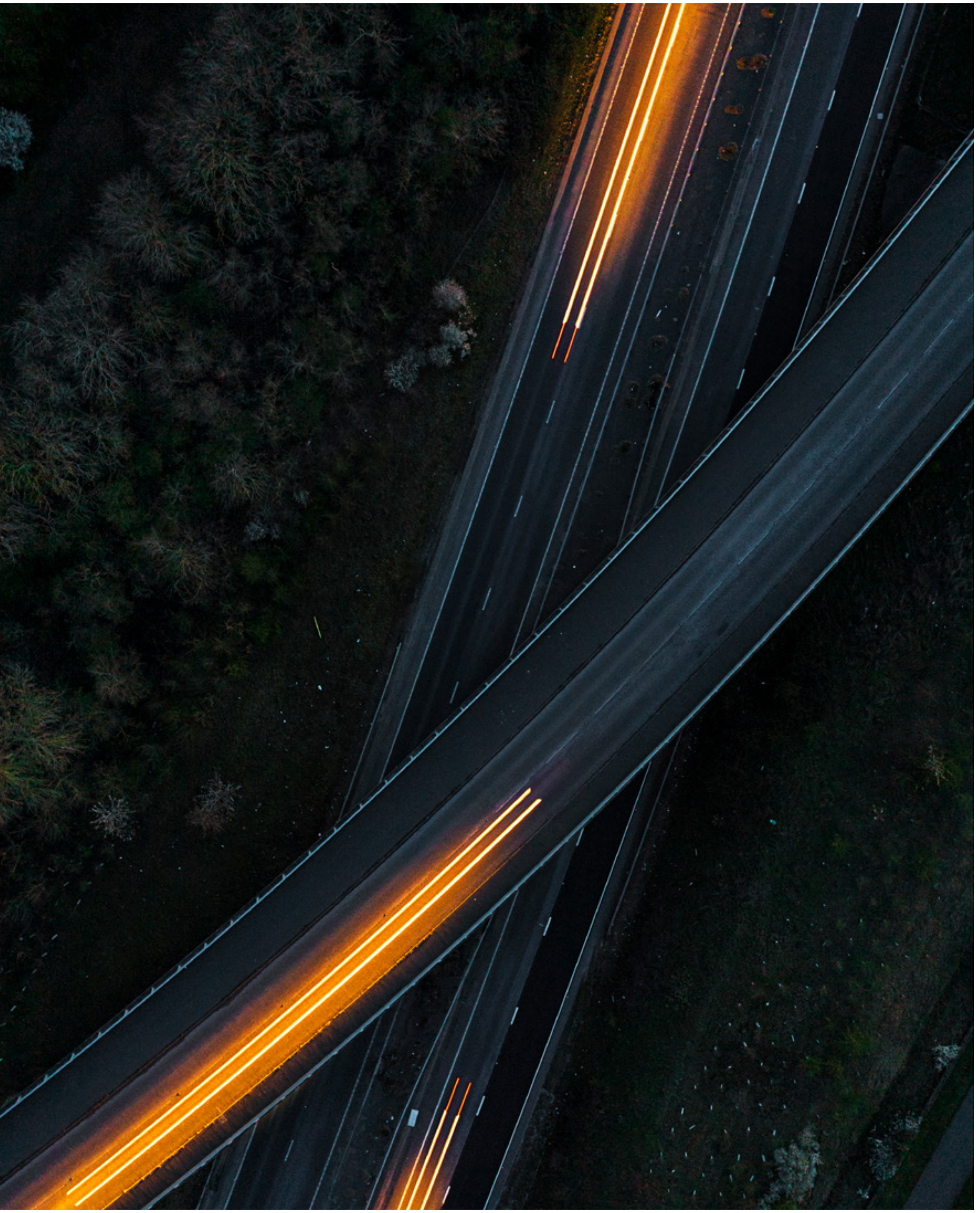
Accelerating through adversity

Rather than retreating during economic headwinds or technological shifts, Microsoft has consistently leaned into change—using disruption as a catalyst for reinvention.

During the early days of the COVID-19 pandemic, Microsoft rapidly scaled its cloud and collaboration platforms to meet surging global demand. It reoriented its strategy to accelerate growth across Azure, Teams and AI integration. These moves paid off: Azure revenue grew 59% year-over-year in the third quarter of 2020, and Teams daily active users surged from 44 million in March 2020 to 115 million in six months.[3]

More recently, it has positioned itself at the forefront of the gen AI revolution by partnering with OpenAI and embedding generative capabilities across its product suite. For instance, Microsoft reported 15 million GitHub Copilot users in the third quarter of 2025, four times the number of users in the year before.[4] In each case, Microsoft reframed volatility as an opportunity to lead—converting uncertainty into first-mover advantage and long-term value creation.





Our research shows that this mindset is more than optimism; it's backed by performance. When we simulated how companies would fare under future disruption scenarios (see About the Research: Resilience Index Simulations), the results were striking:

60%

of companies in the top quartile of the Resilience Index reported a positive return on profits, compared to just 21% in the bottom quartile after undergoing a severe shock.

Highly resilient companies achieved a median profit margin

6.1

percentage points higher and a median revenue growth rate 3.0 points greater than their low-resilience peers post-shock.

These findings challenge the notion that resilience is primarily a defensive strategy. In practice, the most resilient companies are also the most likely to create upside during volatility, capitalizing on change, accelerating transformation and outperforming competitors while others stand still.

Second, adaptively resilient companies **build flexible operating models**, not in reaction to a crisis, but to stay ahead of it. Centralized efficiency is breaking down under the strain of tariff shocks, climate events and geopolitical fractures. In its place, a new model built on redundancy, regionality and real-time responsiveness is emerging. This isn't about hedging bets; it's about designing systems that bend, not break.

Leading organizations are moving away from globalized value chains toward regionalized, decarbonized and digitally enabled operations. Flexible strategies that de-risk supply bases and localize production are fast becoming the norm.

Case Study | Unilever

Local production, global impact

Unilever combines its global footprint with local strengths, maintaining high standards worldwide while empowering local teams to adapt products, supply strategies and marketing to regional needs at the same time.

This localized production approach not only helps to diversify and deepen supplier relationships but also reduces shipping costs and the company's carbon footprint. During the pandemic, Unilever's flexible production model allowed it to avoid major bottlenecks, maintain service levels and preserve business continuity in highly volatile conditions. Taking quick action—such as adapting a deodorant factory to produce hand sanitizer in just 25 days—enabled[5] it to increase capacity 600 times to meet pandemic-driven demand.[6]

More recently, its focus on decarbonized logistics and AI-powered forecasting has further enhanced its agility, enabling smarter, faster responses to emerging risks across markets. When scaled across 75% of the company's production capacity, their proprietary digital platform improved overall equipment effectiveness by 3%, raised labor productivity by 5% and reduced costs by 8%.[7]

This level of agility doesn't happen by chance—it demands a fundamental rethink of planning and decision-making. Companies must learn to anticipate disruption, not just absorb it. Scenario planning—a shift from linear forecasting to agile, multi-scenario strategies that surface risks and enable confident, real-time action—becomes essential. With intelligent multi-tier visibility, scenario-driven decisioning and AI-powered systems, resilience becomes a source of strategic advantage.

In our recent study on supply chain resilience, companies with mature resilience capabilities experienced materially less disruption, reporting smaller revenue losses (-7.4% vs. -10.4%) and EBIT (earnings before interest and tax) declines (-3.04% vs. -4.09%) than their less-prepared peers.

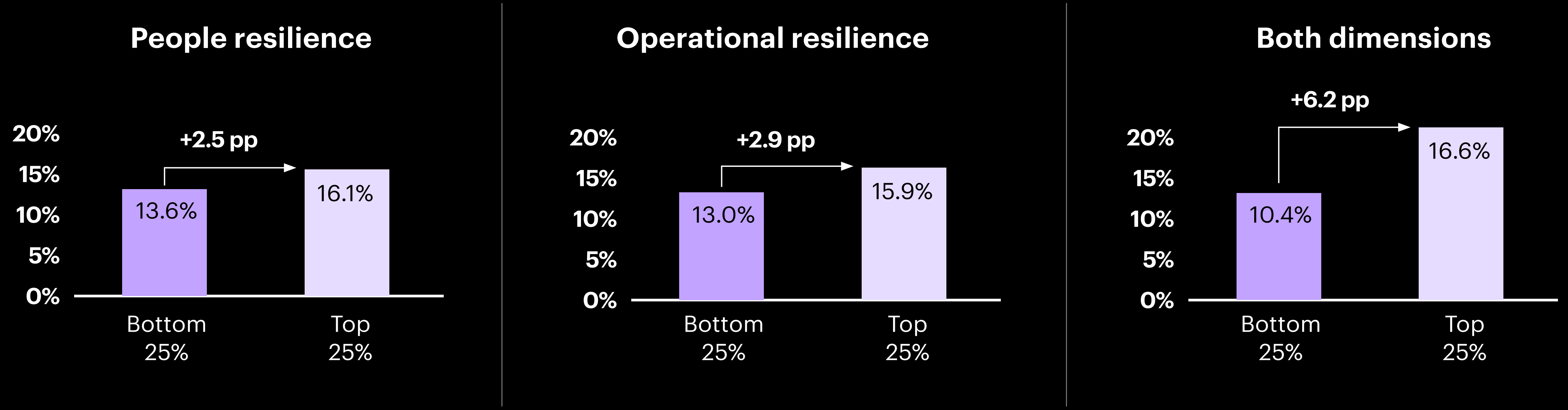
Third, they invest in people, not just platforms. These organizations don't treat talent as a cost to manage but as a source of strategic advantage. While advanced technologies and modern operating models are critical, they only reach their potential when paired with an investment in people. Flexible operations demand more than structural agility. They require frontline teams with the autonomy and judgment to navigate ambiguity, seize local opportunities and adapt in real time.

The return is tangible. Companies that demonstrate strength in both talent and operational resilience outperform their peers, achieving a 6.2 percentage point profit margin advantage over those with weaker capabilities (see Figure 12).

Figure 12: The power of people and operational resilience

Financial impact of gaps in people and operational resilience, 2024 Q4

Profitability | EBIT/Revenues (%)



Source: Accenture Research.

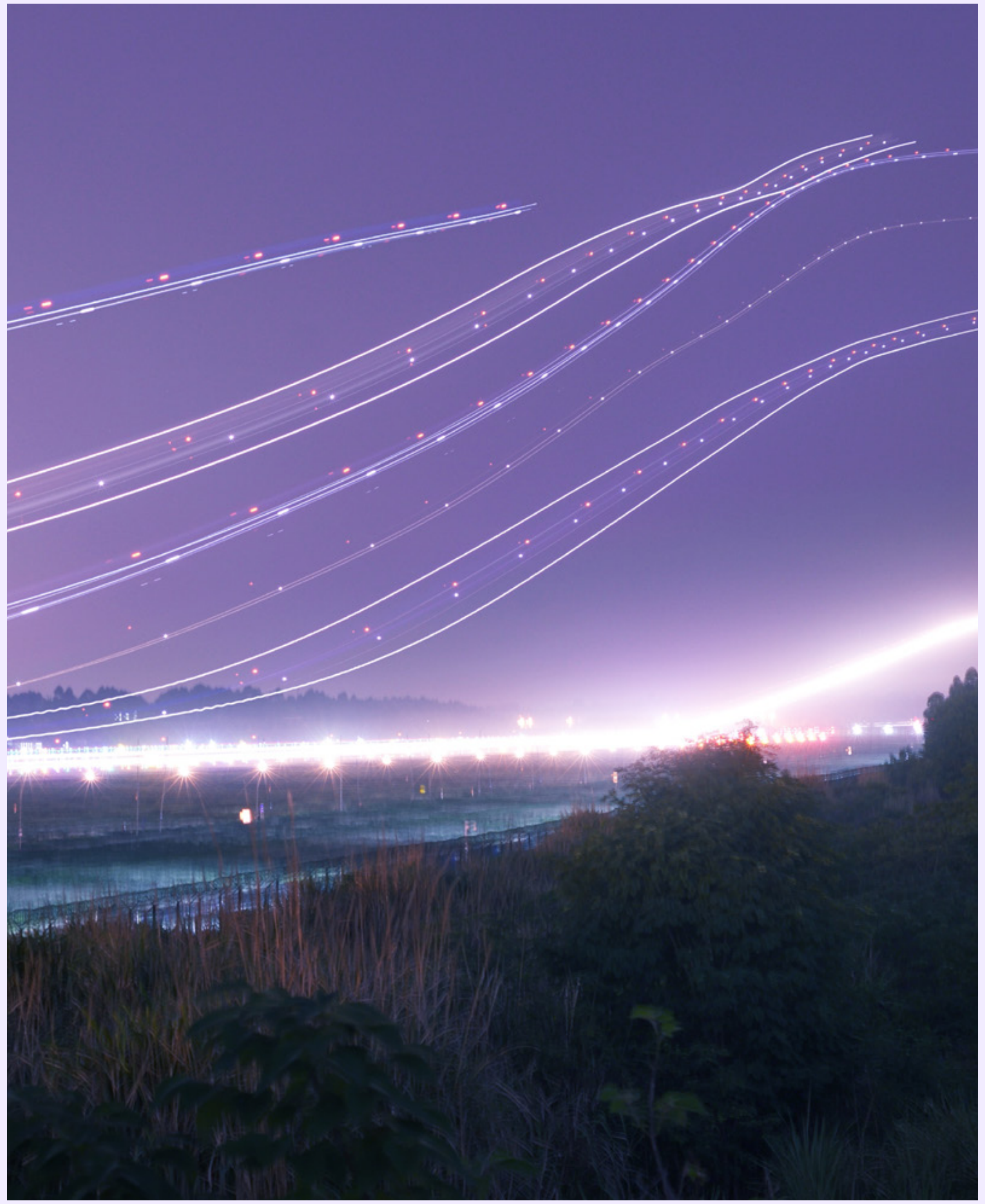
Case Study | Siemens

Where risk meets results

A leader in digital technologies—and also the people and systems that keep those technologies resilient under pressure.

At Siemens, resilience isn't reactive, its institutionalized. The company's Enterprise Risk Management (ERM) system is comprehensive, proactive, and deeply embedded in management decision-making. It integrates early-warning systems and coordinated controls to detect and respond to disruptions before they escalate.[8] This capability doesn't just protect Siemens—it powers others. Through Siemens Advanta, the company has commercialized its risk expertise, helping clients achieve up to a 30% improvement in supply chain efficiency and a 40% reduction in lead times.[9]

Its Supply Chain Tariffs Analytics Solution, in particular, has proven critical for businesses navigating the volatility of global trade. At Siemens, adaptability is not just strategic—it's cultural. Risk awareness is embedded across the workforce: teams regularly participate in crisis simulations, and local leaders are empowered to make rapid, informed decisions on the ground. This culture of distributed responsibility—reinforced by scenario-tested plans and proactive communication—enables Siemens to respond with both structural strength and human agility.[10] The result is a workforce as adaptive, resilient, and forward-looking as its operations.



And most importantly, adaptively resilient companies **foster cultures that normalize disruption.** They actively explore future scenarios, embrace uncertainty as a driver of learning and treat resilience not as a safety net but as a springboard for innovation.

The risks of inaction are real. Companies that look resilient on dashboards may falter when the next shock hits. But the opportunity is far greater. Those that embrace adaptive resilience—by realigning investments, redesigning operations and rethinking what it means to be prepared—won't just withstand disruption. They'll use it to lead, to grow and to shape the future on their own terms.

Contact us to learn more:
www.accenture.com/us-en/about/contact-us

About the research

Since 2023, Accenture has been tracking how organizations are responding to sustained disruption through a robust methodology including the Accenture Resilience Index—a proprietary global benchmark framework spanning 1,600 companies around the world designed to evaluate companies' performance and uncover the link between the strength of their capabilities and their ability to grow profitably.

Accenture Resilience Index

Our model leverages outside-in data to construct a set of 25 indexes (0–100) reflecting a company's percentile position within its industry peer set along three macro-dimensions: financial strength, business strength—which includes strengths associated with commercial, people, operational, and sustainability (ESG)—and technology strength. The overall Resilience

Index score is the average of financial, business and technology strength.

The Resilience Index scores are early signals of performance and structures across the following dimensions:

- **Financial solvency:** Ability to sustain a healthy balance sheet. We measure it through the Altman z-score.
- **Commercial:** Ability to sustain and grow sales.
- **Technology:** Company's focus on talent technology quotient and core digital components including cloud, data and AI and cybersecurity—as enablers of agility, innovation and trust.
- **Operational:** Ability to balance risk exposure and cost efficiencies in global operations.
- **People:** Ability to attract and nurture the talent needed for the organization to thrive amidst disruption.
- **Sustainability:** Ability to embed environmental, social and governance (ESG) measures and practices across the organization.

Resilience Index Simulations

To understand how resilience translates into real-world performance under stress, we conducted a series of simulations modeling how companies might fare in future severe disruption scenarios. Using a Monte Carlo approach, we introduced calibrated shocks—based on observed declines during past crises like the pandemic—to simulate the impact on Resilience Index (RI) scores. Our goal was to estimate the potential financial consequences for organizations given their current resilience levels.

Step 1 - Estimate performance probabilities
We built a parametric model to estimate the probability of each company landing in one of four financial performance quadrants. These probabilities are based on the company's current RI score and how it has evolved over four time periods.

Step 2 - Simulate disruption
We applied the Monte Carlo method to simulate negative asymmetric shocks to RI scores, grounded in actual index movements during prior crises (e.g., the COVID-19 pandemic). These shocks were then amplified to explore the potential impact of more extreme future disruptions.

Step 3 - Recalculate impact and RoRes
With the adjusted RI scores, we recalculated each company's likelihood of falling into each performance quadrant. We then estimated the expected performance—what we call the Return on Resilience (RoRes)—based on these updated probabilities.

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Acknowledgements

The authors would like to acknowledge Ana Ruiz Hernanz, Julia Segoviano, Vicky Arbeletche, Lucia Pezzarini, Ramiro Kossakoff, Franco Mazzitelli, Emily Thornton, Regina Maruca, Rebecca Tan, Belén Rubio and Linda Ringnalda for their contributions.

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