accenture

Navigating Resilience

Key Insights for the Energy C-suite

The current situation for Energy companies

Risks for global demand, inflation and supply chains, leading to higher costs and delays of materials/equipment and re-routing of commodities.

$60/bbl	+3 to 16%	+10 to 20%	+18%
Average Brent price expected for 2026 by several analysts	Jump in cost of LNG projects under construction and pre-FID	cost increase expected y-y for OCTG pipes and related equipment needed for drilling and casing	increase in US LNG volumes to EU in Apr 2025 y-y

Sources: Accenture Research with Rystad and public sources

Top CEO concerns

Capex Climate – Rising costs and delays are driving investment deferrals, complicating long-term planning and reshaping capital priorities for oil, gas and low-carbon.

Energy Flows – Trade tensions and weak demand are disrupting global oil and gas flows, pressuring prices and exposing supply route vulnerabilities.

Portfolio Jitters – Tariff uncertainty is prompting companies to evaluate their assets against the changing economics, to improve capital allocation while optimizing remaining assets.

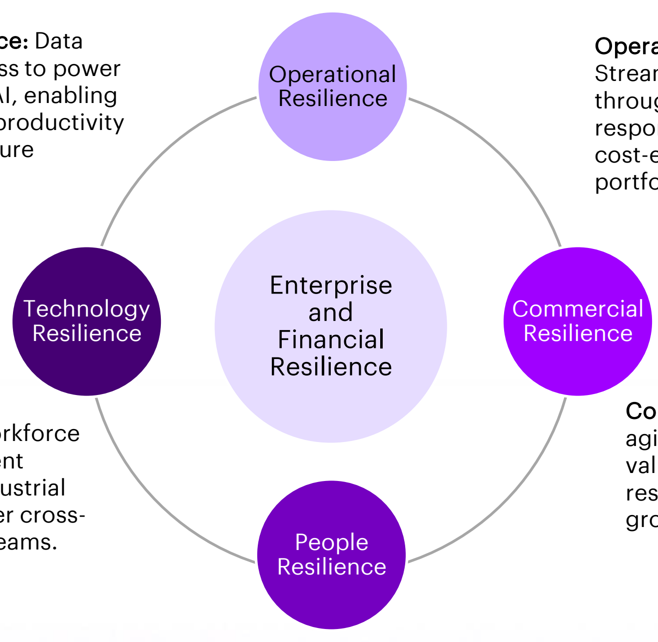
Disrupted Supply Chains – Material and equipment shortages and tariff friction are extending lead times, increasing project risk, and straining logistics.

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.

Technology Resilience: Data and systems readiness to power operations through AI, enabling tariff risk detection, productivity gains, and cyber-secure workflows..

Operational Resilience: Streamlined energy operations through agile supply chains, responsive procurement, and cost-efficient production and portfolio actions.



People Resilience: Workforce flexibility to adapt talent mindsets, upskill for industrial agendas, and empower cross-functional resilience teams.

Commercial Resilience: Market agility to anticipate shifts, launch valued offerings, and reallocate resources—ensuring relevance and growth in volatile demand.

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	Run tariff scenario diagnostics across contracts; reprioritize capital with FX and tariff sensitivity in mind.	Use AI-enabled simulations to model geographic and JV exposure, optimizing capital allocation under uncertainty.
Operational Resilience	Boost supply chain visibility and secure key components through pre-buys, hedging, and modular deployment.	Redesign capital delivery for regional onshoring and diversify vendor base to reduce restart risk.
Commercial Resilience	Re-examine pricing clauses, tailor messaging to demand shifts, and apply AI for targeted customer insights.	Build new product/service strategies to absorb/pass on costs and partner across clusters to de-risk sales.
People Resilience	Upskill crews, retain skilled offshore workers, and map global transitions for redeployment readiness.	Redesign workforce models for agility and partner with tech vendors to support augmentation and training.
Technology Resilience	Deploy automation to manage tariff impacts and ensure secure digital workflows amid geopolitical threats.	Scale predictive analytics and digital twins to optimize OPEX and evolve long-term digital architectures.

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

navigating the new tariff landscape and its economic impact