

NAVIGATING THE UNSEEN: Key Disruptors for Tomorrow's Leaders

Insights from the IBCircle CEO & CFO Global Roundup

June 26, 2025

1.0

EVENT CONTEXT



THE UNPRECEDENTED AGE OF UNCERTAINTY

Over 50 CEOs, CFOs, and investors gathered in Denver for the IBCircle CEO & CFO Global Roundup.

The event aimed to discuss critical issues every leader should address, beyond common topics like tariffs and geopolitical risks.

The dominant sentiment: unprecedented global business uncertainty.

Key Stat:

Over **3,100** mentions of "uncertain" and "uncertainty" in US public company earnings calls in a 90-day period – more than during the 2008 financial crisis or COVID-19.

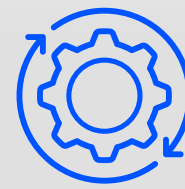


Traditional linear strategic planning is no longer sufficient.



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SIX STRATEGIC DISRUPTORS



Critical disruptors demanding proactive engagement

2.1 PEOPLE AS A STRATEGIC DISRUPTOR

Workforces are shrinking in most industrialized nations (e.g., China, Japan, South Korea, 22 of 27 EU nations, UK, US).

The U.S. workforce participation rate is lower than **20** years ago.

Ignoring talent acquisition and retention is a "serious strategic threat" for boards and CEOs.

Managing four generations (Boomers, Gen X, Millennials, Gen Z) in a workplace for the first time in history presents complexity due to very different frames of reference and experiences."

This is due to declining birth rates and an aging population.

Key Stat:

Every day, **11,000** people turn **65** in the US.

AI may be a needed "lifeline" in some industries to keep global commerce functioning due to the labor shortfall.



"AI's not going to take your job, but somebody with/using AI is going to take your job if you don't start to embrace it".

Sean O'Neil
Cardinal Peak's co-CEO

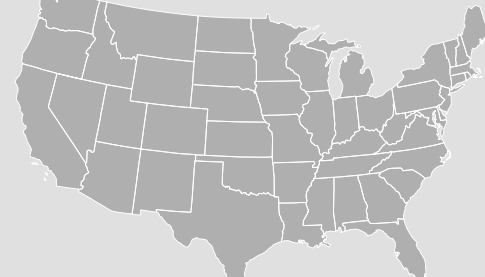
2.2 ENERGY TRANSITION & AI DEPENDENCY

AI has "immense energy requirements".

A global race for energy dominance is underway, with China aiming to provide "literally half the world's nuclear power".

Key Stat:

Future AI power needs exceed current capacity in several states. Without a change in energy infrastructure, we cannot support coming AI investments"



AI's current rate of acceleration cannot be sustained without a scientific breakthrough in energy generation and storage.

2.3 GLOBAL INNOVATION & TECH LEAPFROGGING

"Deep tech at lower cost that may leapfrog our current paradigm of Western innovation" is emerging from non-Western places like "Pune and Jakarta and Shenzhen".

China's BYD, the world's largest electric carmaker, plans to introduce full autonomous capabilities into its vehicles at no additional cost next year. A new car will cost around **\$10,000**.



"At some point, innovation wins" over protectionism.

This directly challenges Western dominance.

2.4 EROSION OF TRUST & THE "AUTHENTIC ECONOMY"



Widespread disinformation, deep fakes, and AI-generated content are causing an "erosion of trust from the consumer in governments, leadership and brands."

Younger generations are "trained not to trust many things at face value".

Companies must treat reputation and trust as "an asset to secure and as an asset to earn".

"AI doesn't yet do empathy well," increasing the value of human creativity and authentic connection.

This environment increases the value of authenticity - it will become an extremely valuable currency and will give rise to increasing verifiability and authentication.

2.5 REGULATORY FRAGMENTATION & DYNAMIC GLOBAL TAX LANDSCAPE

A "regulatory acceleration is happening around the world," with governments vying to set de facto standards (e.g., data privacy, climate, AI).

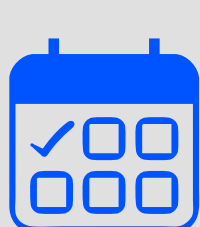
This creates "global fragmentation" of rules.

International tax advice now constantly changes; G7 talks altered advice within three hours.

Organizations must treat regulatory frameworks as a "design constraint," not just compliance activity.



2.6 THE IMPERATIVE OF PROACTIVE PLANNING



Despite "unprecedented uncertainty," the clear advice is "you have to do something different because you cannot plan for the future the way you have planned in the past."

Strategic planning needs to evolve immediately to avoid companies being blindsided by these coming forces.



"The winners in global commerce are not going to be those who optimized yesterday. They're going to be people who had the courage to confront the unseen, invest in the overlooked, and design for disruption".

Gary Montes de Oca



3.0

CONCLUDING THOUGHT

PREPARING FOR A NON-LINEAR FUTURE



The global business environment is no longer linear or predictable.



Leaders must broaden their "paradigm" beyond everyday metrics to contemplate transformative changes.



Proactive engagement with technological, demographic, energy, and regulatory disruptions, coupled with building authentic trust, will distinguish successful organizations.