THE STRATEGIC RISK INTELLIGENCE GAP (AND WHY IT'S ACTUALLY A CAREER OPPORTUNITY)

Jay Dunne – January 2026

Global uncertainty recently hit levels not seen in two decades—significantly higher than during the 2008 financial crisis. Yet according to recent research from the World Economic Forum and Boston Consulting Group, most companies lack dedicated geopolitical capabilities. Even fewer can translate geopolitical developments into concrete business impact.

Most will agree this gap is costing real money and creating strategic blind spots.

The Intelligence That Goes Nowhere

We've all seen this: A brilliant geopolitical/risk intel/GSOC analyst writes a comprehensive assessment with significant strategic risk implications. Thorough, well-sourced, analytically rigorous. It goes into someone's inbox and dies there.

Meanwhile, the CFO three floors up is making a major capital allocation decision that would absolutely benefit from that analysis. But nobody's translating that intel into language that makes sense in that context.

The problem isn't that companies lack smart people thinking about geopolitics. It's that those people are **disconnected from the decision-making machinery**.

When It Works, It Really Works

When sanctions stemming from the Russian invasion of Ukraine in 2022 disrupt supply chains, some companies scrambled. Others had already war-gamed scenarios, identified alternatives, and moved before markets shifted.

Same with recent tariff announcements. Companies with mature capabilities had playbooks ready. They weren't having first-time conversations about "should we be worried?"—they were executing predetermined response plans.

The difference isn't just faster intelligence. **It's having analysts who report directly to executives making investment and operations decisions, not buried three layers deep in a risk management function.**

Three Barriers (That Are Actually Solvable)

1. Translators Are Needed

Security teams speak in threat assessments. Finance speaks in dollars—revenue impact, margin compression, cash flow implications. The gap between how government officials think and how supply chain managers operate creates a translation problem most organizations haven't solved.

2. No Executive Sponsor
If geopolitical analysis never reaches C-suite discussions, it's just compliance theater. If geopolitical analysis never reaches C-suite discussions, it's just compliance theater. The difference between capabilities that influence decisions and those that don't usually comes down to whether they have executive sponsorship and board visibility.

3. Everything's Siloed
Corporate security handles physical threats. InfoSec owns cyber. Business continuity plans for disruptions. When major geopolitical shocks hit all four areas, how well are these teams communicating? Or is nobody coordinating because they report to different executives and use different frameworks?

The Model That's Working

The companies getting this right are building **centralized coordination functions—**small teams embedded in strategic decision-making with explicit authority to convene and orchestrate.

What makes them different:

They quantify everything. Not heat maps. Actual dollars. "This regulatory change impacts $X in revenue over Y quarters with Z% probability."

They have decision rights. They're in the room where capital allocation happens, when M&A targets get evaluated, when manufacturing footprint decisions get made.

They're led by people who understand the business. No external experts parachuted in. Leaders who've run operations and learned how decisions actually get made in that specific company.

They can activate fast. When something breaks, they spin up cross-functional task forces and coordinate in real-time.

Why the Big 4 Pivot Matters

Major consultancies' expansion into geopolitical strategy isn't empire-building. It signals that **CFOs and boards are explicitly demanding this capability** and can't find it internally.

Companies are paying premium consulting rates for something that should exist in-house because **the talent with the right mix of skills is that rare.**

This is creating new job categories:

- Chief Geopolitical Officers
- Geopolitical Risk Quantification Specialists
- Strategic Risk Intelligence Product Managers

That last one's interesting—it requires understanding security operations, product development, AND enterprise risk management. It's a convergence role by definition.

Who's Positioned for This?

If you've spent years in global security operations, crisis management, business continuity, or threat intelligence and felt like your work wasn't influencing strategy—this could be your opening.

Deep operational experience in running global security operations centers, leading crisis response, managing threat intelligence, or corporate strategy roles.

Translation ability: Explaining what geopolitical developments mean in P&L terms, supply chain implications, regulatory timelines.

Cross-functional coordination skills: Working with legal, HR, communications, finance during actual crises.

Business acumen: Understanding how your company makes money and how decisions actually get made.

The Reframe That Matters

If you are coming from intelligence or security operations, **the challenge is repositioning from tactical execution to strategic integration.**

Instead of: "I managed a 24/7 operations center"
Try: "I synthesized complex threat intelligence and translated it into operational decisions under time pressure, coordinating across legal, communications, and regional teams."

Instead of: "I produced intelligence reports"
Try: "I developed scenario-based risk assessments that informed supply chain decisions and capital allocation, working with finance to quantify exposure."

The work is the same. The narrative emphasizes strategic context and business impact.

The Bottom Line

The convergence point between enterprise risk management, crisis management, global security operations, business continuity, and strategic intelligence is becoming a distinct career category. It barely existed five years ago. Now it's showing up in job descriptions and consulting mandates.

Major consulting firms are building practice areas around this because organizations will pay for external expertise when they cannot develop internal capabilities. Industry research highlights the gap because executives recognize it's becoming a competitive differentiator.

If you can walk into a room and translate geopolitical complexity into strategic options with clear trade-offs—and you have the operational credibility to implement those options—you're not just employable. **You're a rarity.**

Source: Analysis based on "Building Geopolitical Muscle: How Companies Turn Insights into Strategic Advantage" - World Economic Forum, IMD Business School, Boston Consulting Group (January 2026)