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### Getting Out of the Box. Exploring the Competitive Forces Reshaping Global Supply Chains

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#### Background:

Over the past 30 years, companies have invested in China-centric, global supply chains. By the early 2000s, China had emerged as the world's manufacturing floor. Three influential outcomes ensued:

- 1. World consumers became accustomed (if not addicted) to lower product costs.
- 2. High-cost countries outsourced manufacturing and jobs to China (and other low-cost manufacturing regions).
- 3. Companies became dependent on global, lean supply chains and lost manufacturing capabilities to offshore suppliers.

At the time, little research examined the systems ramifications—especially the tradeoffs and constraints—of globalized and interdependent supply chains.

However, warnings grew louder. In 2011, the Tohoku Earthquake and Tsunami in Japan disrupted several industries and uncovered dependencies on concentrated suppliers. In retrospect, some business leaders raised the question, "Are we too lean?" Since 2018, President Trump's trade war with China has led to the question, "Are we too dependent on China?" The Covid-19 lockdowns and subsequent supply chain snarls seemed to confirm a clear "Yes." Finally, Russia's invasion of Ukraine put geopolitical tension in the spotlight. The increasing political tension between the economic powerhouses U.S. and China, as well as their allies, raised the question, "Are supply chains prepared for greater economic and political turbulence?"

To summarize, classic disruptions, policies driven by economic populism, and intensifying geopolitical rivalry threaten the architecture of global supply chains that have emerged over the past 40 years. Perhaps never before have businesses encountered as dynamic and tumultuous supply chains as today. Change is everywhere—and the demands placed on supply chain management are increasing. Consider this reality: Covid-19 didn't just raise awareness regarding supply chain management; it raised concerns that modern global supply chains were designed for a simpler, more certain operating environment. The question is, "How should companies structure supply chain networks to prepare for an increasingly uncertain tomorrow?

#### **Responses:**

Decision makers—from academics to business leaders to politicians—have weighed in with a variety of approaches to successfully re-structuring supply chain networks (Hughes et al. 2025). Three primary approaches/themes dominate:

1. Geography: Many pundits argue the time has come to rethink where businesses locate and perform value-added activities. Specifically, many argue a need to de-couple value-added activities from China. The terms friend shoring, near shoring, and re-shoring are now commonly used to promote the idea that value-added activities need to be re-located closer to the market where products are sold and services delivered (Zhang et al. 2024, Tate and Bals, 2017, Gray et al. 2013).

2. Relationships: Another strategy related to designing global supply chain networks reconsiders relationships. Successful companies pursue the right partners, make sure each partner is in the right roles with the right responsibilities, and build the right relationships to create remarkable value. Much research evaluates dyadic, and even triadic, relationships (Wu and Choi, 2022). Minimal research, however, examines more exerted supply chains—or supply chain relationships among non-traditional partners - e.g., public-private relationships (Larson,

2009, Stewart et al. 2009).

3. Technology: A final approach to supply chain network design leverages the so-called game-changing technologies to enable new structures. For example, additive manufacturing (Paul et al. 2023) and robotics (Nikseresht et al. 2024) promise to change cost structures and resilience. A potential result: Technology may supplant low-cost labor's role as a driver of supply chain design, dramatically reducing the allure of outsourcing and offshoring strategies. The McKinsey Global Institute (2017) has estimated that technology will replace up to 700 million jobs by 2030.

Designing competitive supply chain networks while avoiding unintended consequences and mitigating tradeoffs remains to be challenging. Companies that adopt and blend geography, relationship, and technology decisions appropriately can improve their competitive prospects in an uncertain and turbulent marketplace.

#### Motivations and aims of the call

Given the continuous need for supply chain adjustments, we are inviting empirical and analytical research that explores the forces reshaping global supply chain design and structure. Although none of the forces described below are totally new - many among them have been studied for decades - they need to be reconsidered in the context of rapid economic, political, and environmental changes. We are looking for high-quality research that delves into the following:

- Global SC Networks. Since the 1980s, many supply chains have been purposefully designed to be global and lean! Particularly since Covid-19, disruptions and persistent uncertainty gave rise to a need for more resilient and more local supply chains. What should the supply chain network of tomorrow look like?
- **Geopolitics.** Geopolitics have also been part of the supply chain design process. That said, geopolitical rivalry and tension are at levels not seen in 40+ years. How can decision-makers navigate geopolitical currents through better supply chain design?
- Government Intervention. Forces shaping new supply chains also arise from potential government intervention, from regulation to tariffs. How does (and should) government policy influence supply chain strategy and supply chain design?
- Shifting the Entity of Competition. Over 15 years ago, BCG's Harold Sirkin noted, "As the economy changes, as competition becomes more global, it's no longer company vs. company but supply chain vs. supply chain." If indeed forces of globalization move us towards localization, the pool of available suppliers might become smaller, with supply chains becoming more overlapped. How will this idea of "competition through supply chains" change?
- **Technology.** Technology has always influenced SC design. However, today, a variety of game-changing technologies —e.g., additive manufacturing, AI, autonomy, IoT, and robotics—are emerging. **How will emerging technologies influence new supply chain designs of the future?**
- **Tradeoffs.** Risk and sustainability are now part of the calculus in supply chain design. Yet, tradeoffs exist among operational excellence, risk, and sustainability. How can and how should decision-makers manage the intersection of these decision drivers?
- New Alliances. Given the scale and scope of changes, new forms of partnerships across geographies, entities, industries, and political views may emerge. How do such new partnerships and alliances influence supply chain strategies and structure?

Each of these themes has the potential to expand, or limit, supply chain design. However, many unknowns remain and warrant further investigation. We seek research that takes an out-of-the box perspective investigating the threats and opportunities of those competitive forces to current supply chain design. Research should help academics as well as practitioners cope with and leverage these forces to rethink global supply chain management.

Submissions are due January 15, 2026 (submission window opens on November 15). All papers will undergo an expedited double-blind review—4 months from submission to decision (review, revision, review, revision, decision).

We plan to host a paper development workshop for this STF at the ERS conference in Verona Italy (Department of Management, University of Verona), June 18<sup>th</sup>. Please reach out to the guest editors if you are

interested in submitting to this STF, or as questions arise.

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