

'FROM THE ERA OF GLOBALIZATION TO THE ERA OF RESILIENCE'



WHAT THE FUNDAMENTAL SHIFT OF THE OPERATING ENVIRONMENT MEANS FOR YOUR SUPPLY CHAIN - AND YOUR BUSINESS'



Past Global Economic Order

- Globally optimized
- Cost efficient
- Just-in-time supply chain
- Built on stable geopolitics
- Open trade
- Predictable lead times



Today's Global Economic Order

- Geopolitical fragmentation
- Trade barriers
- Volatility in trade policies
- Strategic competition over critical materials and technologies
- Regional conflicts and wars disrupting supplies and key corridors

Structural shift, rewriting the rules of supply & value chain design



Exposure & Risks

- Distant single-source suppliers
- Single country / region exposure
- Limited visibility beyond tier one
- Procurement organizations built for efficiency rather than resilience
- No structured framework for assessing or responding to geopolitical risk



Resilience & Competitive Edge

- Diversified sourcing strategies, designed to maximize TCO / TVO
- Regional for regional / local for local
- Deep-tier supply network visibility
- Resilient and agile organizational setup
- Upskilled Procurement capability
- Holistic risk framework

EXECUTIVE TAKEAWAY: Businesses addressing this shift now and proactively by redesigning their supply & value chains and Procurement capabilities will be the ones that will prevail with a superior cost and cash position, delivery capability, and competitiveness.