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AISCR GLOBAL SUPPLY CHAIN OUTLOOK 2026

**NAVIGATING STRUCTURAL VOLATILITY
THROUGH INSTITUTIONAL INTEGRATION**



**AISCR Flagship Survey Report on Supply Chain Expectations,
Systemic Risk and Governance Readiness**

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AISCR FLAGSHIP SURVEY REPORT ON SUPPLY CHAIN EXPECTATIONS, SYSTEMIC RISK AND GOVERNANCE READINESS

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This work reflects a collective effort and AISCR's ongoing commitment to advancing research, informing practice, and driving meaningful transformation in procurement and supply chain systems.

ABOUT AISCR GLOBAL

The Advanced Institute for Supply Chain Research (AISCR) is an independent nonprofit institute dedicated to strengthening supply chain systems through applied research, workforce development, and strategic partnerships. Headquartered in Dallas, Texas, United States, with operations in Cameroon, AISCR works across Africa and globally with universities, governments, industry leaders, and development partners to advance research, professional education, and institutional capacity in supply chain management.

AISCR was originally established in 2019 at the University of South Africa (UNISA) as the African Institute for Supply Chain Research. As the organization expanded its international partnerships and scope, it adopted the name Advanced Institute for Supply Chain Research (AISCR) on March 2, 2026, reflecting its broader global mission.

Through research-driven solutions, professional education, and multi-stakeholder collaboration, AISCR works to strengthen supply chain governance, build professional capacity, and promote transparent, efficient, and resilient supply chains that support economic growth and sustainable development across Africa and beyond.

We bridge the gap between academic scholarship, industry practice, and public-sector decision-making, ensuring that knowledge leads to implementation, measurable results, and sustainable impact.



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FOREWORD

It is my honor to present this report on behalf of the Advanced Institute for Supply Chain Research (AISCR). This report addresses a critical theme in today's environment, the need for more resilient, transparent, and data-driven supply chain systems. Its insights strongly align with AISCR's mission to advance research, strengthen institutional capacity, and promote excellence in procurement and supply chain management.

For supply chain leaders, the report provides clear direction, calling for strategic, innovative, and ethical approaches to managing increasingly complex supply chains. For institutions, it highlights the importance of readiness, governance, and capability development in achieving sustainable and high-performing systems.

Importantly, this report contributes both to knowledge and practice by offering actionable insights that bridge research and real-world application. It reinforces AISCR's role as a catalyst for thought leadership and transformative impact across sectors.

On behalf of the AISCR Board, I commend the authors and encourage stakeholders to use this report as a foundation for informed decision-making and meaningful reform.

Hon. Dagmawit Moges
AISCR Board Chair

AISCR Global

(Advanced Institute for Supply Chain Research)

AISCR Global Supply Chain Outlook 2026

Navigating Structural Volatility Through Institutional Integration

EXECUTIVE SUMMARY

Global supply chains are entering 2026 in a fundamentally altered operating environment. The assumptions that shaped supply chain strategy for much of the past three decades, relative geopolitical openness, manageable regulatory exposure, stable supplier networks, and efficiency-led optimization, have weakened. Organizations are now navigating a world in which disruption is no longer exceptional, but structural.

The AISCR Global Supply Chain Outlook 2026 examines how professionals across supply chain management, procurement, public institutions, academia and industry perceive the risks, priorities and institutional requirements shaping supply chains in 2026. Based on a survey of 252 respondents, with strong representation from Africa and other emerging-market contexts, the report explores three central questions:

1. What risks are expected to shape supply chains in 2026?
2. How prepared are organizations to manage systemic volatility?
3. How mature are institutional governance capabilities across key readiness dimensions?

The findings point to a clear conclusion: organizations are becoming more aware of supply chain risk faster than they are becoming institutionally equipped to manage it. This is the report's central diagnosis.

Five findings stand out.

First, supply chain risk has become normalized. Respondents overwhelmingly expect elevated disruption to persist in 2026. Geopolitical tensions, trade restrictions, cyber exposure, climate-related disruption and regulatory complexity are no longer viewed as temporary shocks. They are increasingly understood as enduring features of the operating environment.

Second, the center of gravity of supply chain strategy is shifting. Digital capability, sustainability, and regulatory oversight are no longer peripheral concerns. They are now central to how organizations think about resilience, continuity and legitimacy. Supply chains are increasingly being governed not only through logistics and cost management, but through institutional capability.

Third, preparedness remains moderate rather than deeply embedded. While many respondents indicate that their organizations are prepared, relatively few describe them as very well prepared. This suggests that awareness has advanced, but institutional depth remains uneven.

Fourth, institutional readiness is under-integrated. Governance frameworks and workforce capability perform relatively well, but digital infrastructure and data quality remain weaker. Many organizations appear to have formal structures and committed personnel, yet still lack the systems integration and information capability required for real-time resilience.

Fifth, the core challenge for 2026 is governance integration. The Governance Capability Index indicates that most institutions are operating at a functional, but not fully integrated, level of maturity. The issue is not institutional absence. It is institutional fragmentation.

The findings reveal a significant imbalance between awareness and preparedness. A large majority of respondents expect supply chain risk to remain elevated, and more than nine in ten identify digital transformation and sustainability as central strategic priorities. Yet only 38.5% report that their organizations are prepared, and fewer than one in ten indicate high-confidence readiness. The composite Governance Capability Index (GCI) score of 3.35 further confirms that many institutions remain at a moderate level of maturity. The central message of this report is therefore straightforward: organizations have reached risk-awareness maturity, but not governance-integration maturity.

That gap matters. In a structurally volatile world, resilience will not be achieved through incremental operational improvements alone. It will depend on whether organizations can redesign governance systems, strengthen digital and data capability, integrate procurement into enterprise strategy, and align resilience efforts across functions. In the supply chain environment now taking shape, resilience is no longer only an operational objective. It is an institutional achievement.

The findings reveal a significant imbalance between awareness and preparedness. While over 80% of respondents expect supply chain risk to remain elevated and over 90% identify digital transformation and sustainability as strategic priorities, only 38.5% of organizations report being prepared, with fewer than 10% indicating high-confidence readiness. The GCI score of 3.35 further confirms that most institutions remain at a moderate level of maturity, highlighting a critical gap between strategic intent and execution.



1. PURPOSE OF THE REPORT

The AISCR Global Supply Chain Outlook 2026 provides a forward-looking assessment of how supply chain and procurement professionals perceive the environment shaping supply chains in 2026. It is designed as a strategic diagnostic for decision-makers in business, government, academia and professional institutions.

The report pursues five objectives:

- Assess expectations regarding the supply chain environment in 2026;
- Identify the principal risks expected to shape supply chain decisions and performance;
- Evaluate how prepared organizations appear to be for managing systemic supply chain volatility;
- Assess institutional governance readiness across key capability dimensions; and
- Identify strategic priorities for strengthening resilience in an era of persistent uncertainty.

At the core of the report is one defining question:

Are organizations structurally prepared to operate in an environment where disruption is continuous rather than episodic?

This is not only a question of operational readiness. It is a question of institutional design. The report therefore focuses on the relationship between risk awareness, organizational preparedness, and governance capability.



2. INTRODUCTION

2.1 The Structural Volatility Imperative

Global supply chains have entered a new phase. For many years, supply chain design was built on assumptions of relative stability: open markets, predictable trade flows, manageable regulatory exposure, and disruptions that were serious but temporary. Under those conditions, organizations optimized for cost, scale, speed and lean efficiency.

That landscape has changed.

Today's supply chains operate in an environment shaped by overlapping geopolitical tensions, cyber vulnerability, climate disruption, regulatory expansion, infrastructure fragility, and supplier concentration. These forces do not operate independently; they interact. As a result, risk is becoming more systemic, less predictable, and harder to isolate.

The central challenge for 2026 is therefore not whether disruption will occur. It is whether institutions are designed to function effectively when disruption is continuous, interconnected and structural.

2.2 From Operational Efficiency to Institutional Resilience

Traditional supply chain strategy emphasized operational excellence: lower procurement costs, faster logistics, reduced inventory, and tighter efficiency. These goals remain important. But on their own, they are no longer sufficient. In a volatile environment:

- efficiency without resilience creates fragility;
- digitalization without cybersecurity creates exposure;
- sustainability commitments without traceability weaken credibility; and
- procurement without governance integration limits strategic response.

Supply chains must therefore be understood not only as operational systems, but as institutional systems. Their resilience depends increasingly on governance structures, digital infrastructure, information quality, regulatory coordination, supplier visibility, and leadership capability.

2.3 Core Focus of the Study

This report evaluates three interrelated questions:

- How do respondents perceive the major risks shaping supply chains in 2026?
- How prepared do organizations appear to be for managing those risks?
- How strong are institutional governance capabilities across the core dimensions required for resilience?

These questions allow the report to assess whether awareness, preparedness and governance maturity are converging, or whether organizations remain structurally misaligned between recognizing risk and being capable of managing it.



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3. INDUSTRY CONTEXT AND STRUCTURAL RISK LANDSCAPE

3.1 The End of the Stability Assumption

The era in which supply chains could rely on stability as a baseline design assumption is over. Global supply chains are now shaped by multiple forms of uncertainty that are simultaneous, overlapping and reinforcing. The challenge is no longer sporadic disruption. It is operating within a structurally unstable environment.

3.2 Geopolitical Fragmentation and Trade Realignment

Geopolitical instability is now a defining force in supply chain strategy. Trade restrictions, sanctions, industrial policy competition, regional conflicts, export controls and shifting alliance structures are reshaping sourcing, production and investment decisions.

This means supply chain strategy can no longer be treated as a purely commercial exercise. Procurement and network design are now deeply exposed to political risk. Institutional foresight and geopolitical sensitivity are becoming core governance requirements.

Supply chain strategy is therefore increasingly shaped by political risk, transforming it from a purely commercial activity into an exercise in institutional foresight and governance.

3.3 Digital Vulnerability and Cyber Exposure

Digital transformation has increased visibility, speed and coordination across supply chains. But it has also created new forms of vulnerability. The more organizations rely on interconnected systems, cloud platforms, automation, and shared data environments, the more exposed they become to cyber disruption and system failure. Cyber risk is therefore no longer only an IT issue. It is a supply chain governance issue.

3.4 Climate Instability and Environmental Exposure

Climate-related disruption is no longer peripheral to supply chain performance. Extreme weather events, infrastructure damage, commodity instability, and transport disruption are affecting sourcing and logistics with growing frequency. At the same time, sustainability expectations from investors, regulators, customers and society continue to rise. Environmental risk is now both an operational issue and a legitimacy issue.

3.5 Regulatory Expansion and Compliance Complexity

Organizations face rising compliance obligations in areas such as ESG reporting, human rights due diligence, trade regulation, local content rules, anti-corruption, and data protection. Compliance is becoming more continuous, more complex, and more closely tied to digital traceability and supplier transparency. This makes governance integration essential. Compliance can no longer sit at the margins of supply chain operations.

3.6 Supplier Fragility and Network Dependence

Supply chains remain vulnerable to supplier concentration, tier opacity, financial stress, logistics bottlenecks and single-source exposure. Many organizations still lack visibility beyond first-tier suppliers, limiting their ability to anticipate disruption before it materializes. Resilience therefore depends not only on supplier management, but on network-level visibility and governance.

3.7 The Governance Imperative

The unifying lesson from this risk landscape is clear: supply chain risk is increasingly institutional, interconnected, and governance-sensitive. Traditional models that separate procurement, risk, compliance, digital systems, and sustainability are no longer effective. What is required is an integrated governance architecture in which procurement acts as a strategic coordination function, linking supplier networks, risk management, compliance systems, and data infrastructure.

Resilient supply chains are not defined by efficiency alone. They are defined by governance integration.

4. METHODOLOGY AND ANALYTICAL APPROACH

4.1 Study Design

This report is based on a cross-sectional survey designed to assess how respondents perceive supply chain conditions in 2026, how prepared their organizations are to manage systemic volatility, and how mature institutional governance capabilities appear across key readiness dimensions. The report is diagnostic rather than causal. Its purpose is not to predict outcomes, but to identify patterns of institutional alignment and capability.

4.2 Sample and Data Collection

The survey targeted professionals working across supply chain management, procurement, governance, public institutions, consulting, training, and academia. Distribution occurred through professional networks, institutional platforms and mailing channels. A total of 252 valid responses were received. The sampling approach is best described as non-probability convenience sampling within professional communities. While this limits statistical generalizability, it is appropriate for capturing informed practitioner perspectives and identifying emerging patterns across institutional environments, especially in African and emerging-market contexts.

4.3 Survey Instrument and Measurement

The survey captured four core domains:

- expectations for supply chains in 2026;
- perception of key risk drivers;
- organizational preparedness; and
- institutional governance capability.

Responses were recorded on a five-point scale, enabling consistent comparison across domains and institutional dimensions. Governance capability was assessed across five dimensions:

- governance frameworks,
- digital infrastructure,
- data quality,
- workforce capability, and
- ethics and sustainability.

4.4 Governance Capability Index

To provide an integrated view of institutional maturity, the report constructs a GCI by averaging scores across the five readiness dimensions. The index functions as a diagnostic measure of institutional maturity and integration. Rather than focusing on isolated capability areas alone, the GCI provides a composite view of how ready institutions appear to be to manage supply chain volatility through coordinated governance.

4.5 Analytical Framework

The analysis proceeds in three stages:

- descriptive analysis of expectations, risk perceptions, preparedness and readiness;
- index analysis through the Governance Capability Index; and
- alignment analysis examining the relationship between risk awareness, preparedness and governance capability.

4.6 Limitations

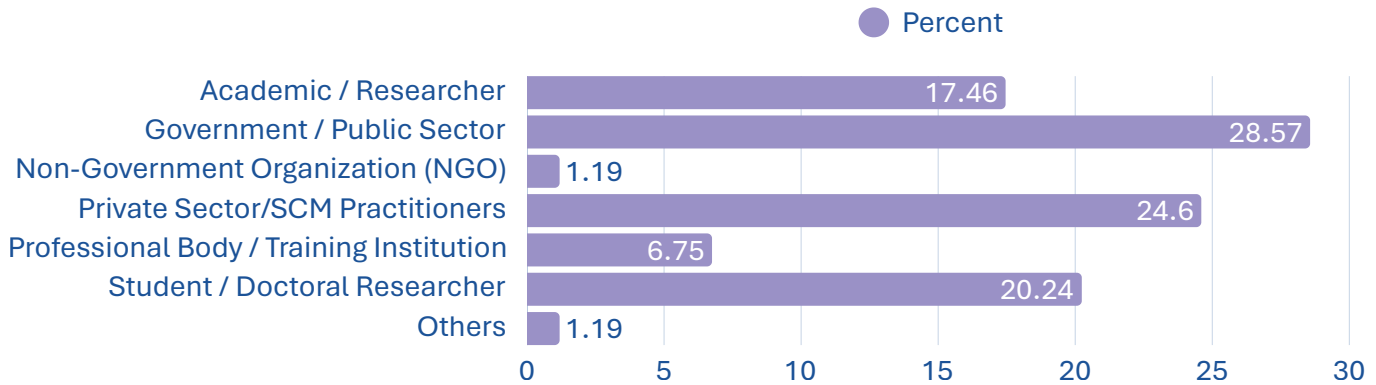
Three limitations should be noted:

- the study is cross-sectional and therefore does not capture change over time;
- findings are based on self-reported perceptions; and
- the sampling approach limits statistical generalizability.

5. SURVEY PROFILE AND RESPONDENT DEMOGRAPHICS

The survey generated 252 responses, providing a diverse cross-section of professionals engaged in supply chain, procurement, governance, training and research.

Figure 1. Description of Participants

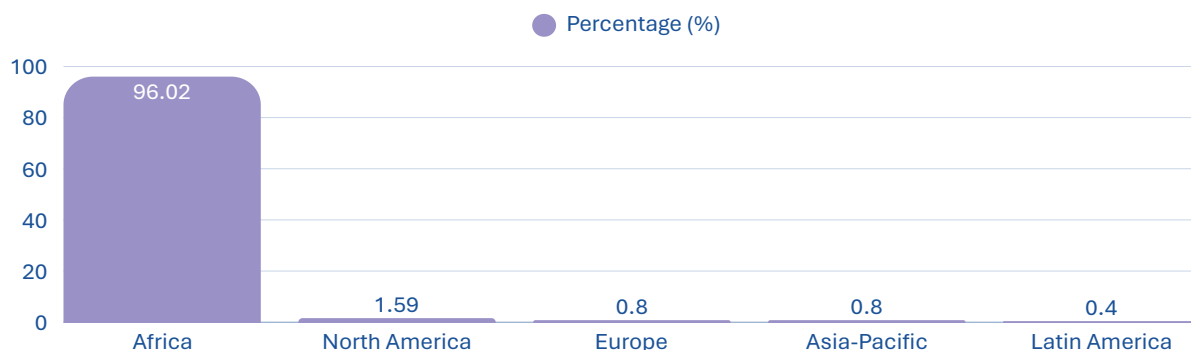


Respondents were drawn from public institutions, private sector organizations, academia, and professional development environments. Public sector participation formed the largest share of the sample, followed by private sector respondents, with additional representation from academia and student or training communities. This composition is significant. The strong participation from the public sector enhances the report’s relevance to procurement governance, institutional capability, regulatory oversight and public-sector supply chain systems. The presence of private sector and academic respondents adds operational and analytical depth.

From a regional perspective, the sample is predominantly Africa-based, giving the report strong relevance for emerging-market contexts where institutional capacity, infrastructure constraints, trade integration, and governance transitions are especially important.

The survey reflects a diverse cross-section of supply chain stakeholders, led by the public sector (28.57%) and private sector (24.6%), followed by students/researchers (20.24%) and academia (17.46%). Professional bodies account for 6.75%. Overall, more than 50% of respondents are from public and private sector institutions, reinforcing the report’s strong relevance to both policy and operational contexts.

Figure 2. Regional Distribution



The respondent profile indicates that the report reflects both operational realities and institutional perspectives, with particular relevance to African procurement and supply chain environments.

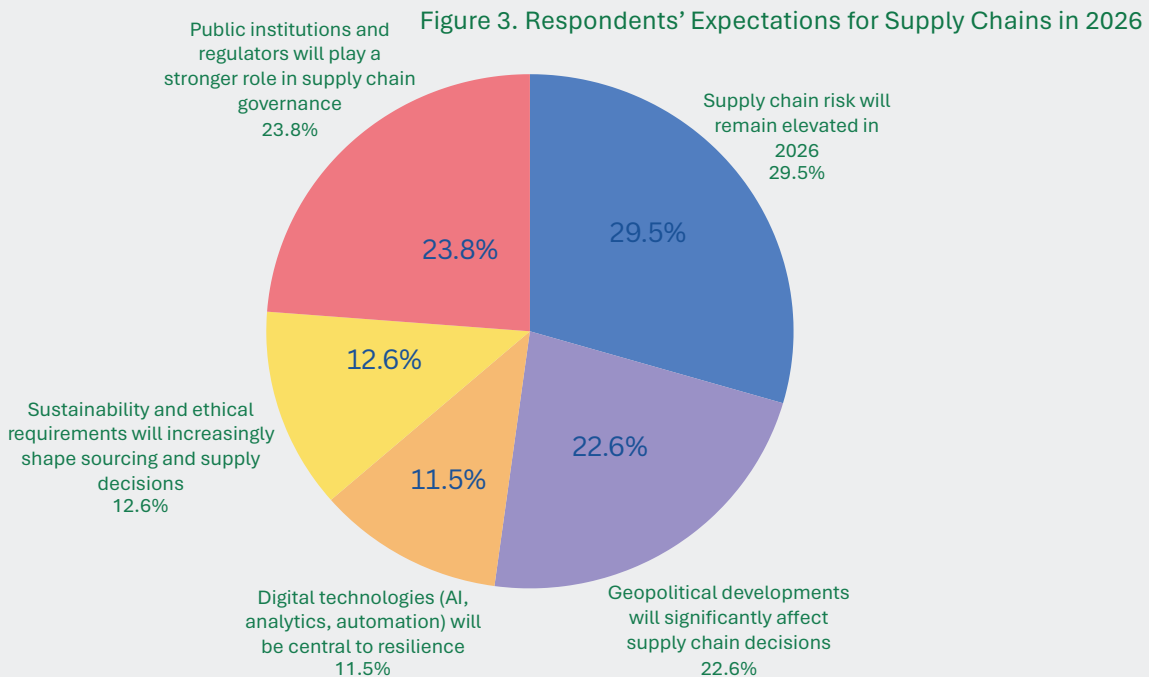
The respondent base is overwhelmingly concentrated in Africa, representing 96.02% of the sample, with limited representation from North America (1.59%), Europe (0.8%), Asia-Pacific (0.8%), and Latin America (0.4%).

This geographic concentration strengthens the report’s relevance for emerging markets, particularly African supply chain systems, while also highlighting the need for broader global participation in future editions.



6. EXPECTATIONS FOR SUPPLY CHAINS IN 2026

Respondents were asked to indicate their level of agreement with forward-looking statements about the supply chain environment in 2026. These items covered expected risk persistence, geopolitical influence, digital transformation, sustainability pressures, and the role of regulators and public institutions.



The findings reveal a clear and consistent pattern:

respondents expect supply chains in 2026 to operate under sustained complexity and elevated institutional pressure.

Several conclusions stand out.

First, there is strong agreement that supply chain risk will remain high. Respondents do not view disruption as temporary. Risk is increasingly seen as a structural condition of the operating environment.

Second, geopolitical developments are expected to exert major influence on sourcing, contracting and network decisions. This reflects a growing recognition that supply chain strategy is now shaped by political and strategic developments as much as by commercial logic.

Third, digital technologies are viewed as essential to resilience. AI, analytics, automation and visibility systems are not seen simply as efficiency tools. They are increasingly understood as foundational enablers of coordination, anticipation and response.

Fourth, sustainability and ethical sourcing receive especially strong support. This is significant because it shows that sustainability has moved beyond symbolic commitment and become part of mainstream expectations regarding supply chain legitimacy and governance.

Fifth, respondents expect a stronger role for public institutions and regulators. This underscores the fact that supply chains in 2026 will operate within a more interventionist and governance-intensive environment.

The overall conclusion is clear, supply chains in 2026 are not being understood merely as logistics systems. They are increasingly being understood as governance systems operating under continuous uncertainty.

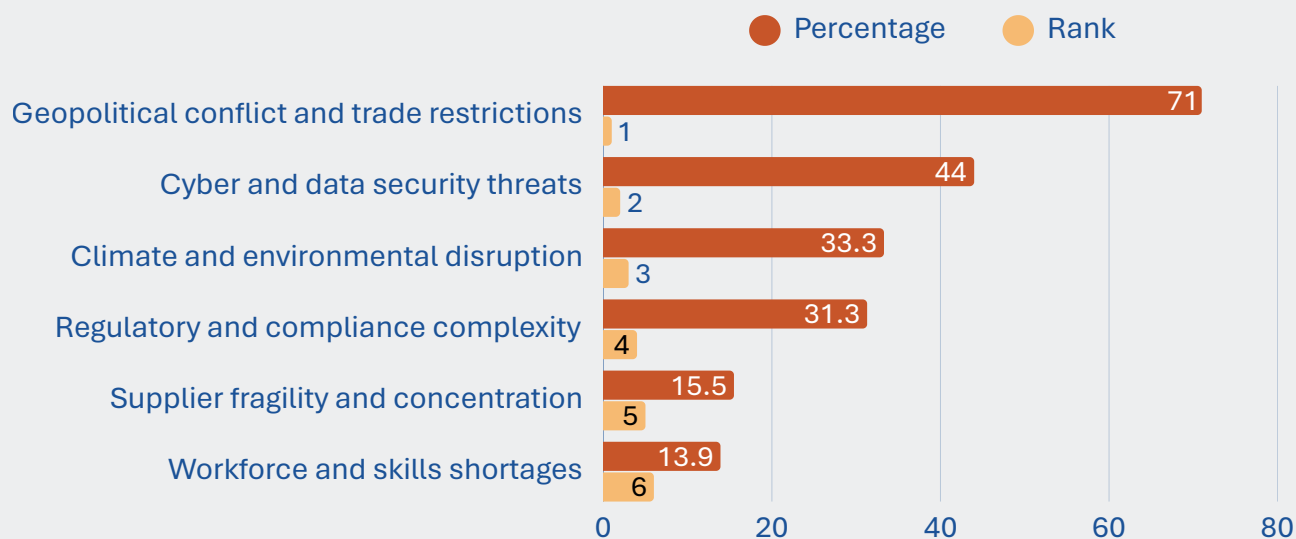
Supply chain disruption is no longer viewed as temporary. A significant 81.3% of respondents expect risk levels to remain high, while 85.7% anticipate continued geopolitical instability. In response, over 90% of organizations identify digital transformation and sustainability as central to future supply chain resilience.



7. KEY SUPPLY CHAIN RISKS FOR 2026

Respondents were asked to identify the two risks most likely to pose the greatest challenge in 2026.

Figure 4. Respondents' Perception of Key Risks in 2026



The rankings reveal a clear hierarchy of concern. The most serious risks are not primarily internal or transactional. They are systemic, external and institutional in nature.

Geopolitical conflict and trade restrictions emerge as the top-ranked risk. This reflects the growing exposure of supply chains to political fragmentation, sanctions, industrial policy and trade disruption.

Cyber and data security threats rank second, highlighting how digital dependence has made cyber resilience a central condition of supply chain continuity.

Climate and environmental disruption ranks third, confirming that environmental instability is now a strategic supply chain issue rather than a long-term background concern.

Regulatory and compliance complexity also ranks highly, reinforcing the idea that supply chains are operating within a more demanding governance environment.

By contrast, supplier fragility and workforce shortages, while still important, are ranked lower. This suggests that respondents increasingly interpret them as part of broader systemic vulnerabilities rather than as isolated risk categories.

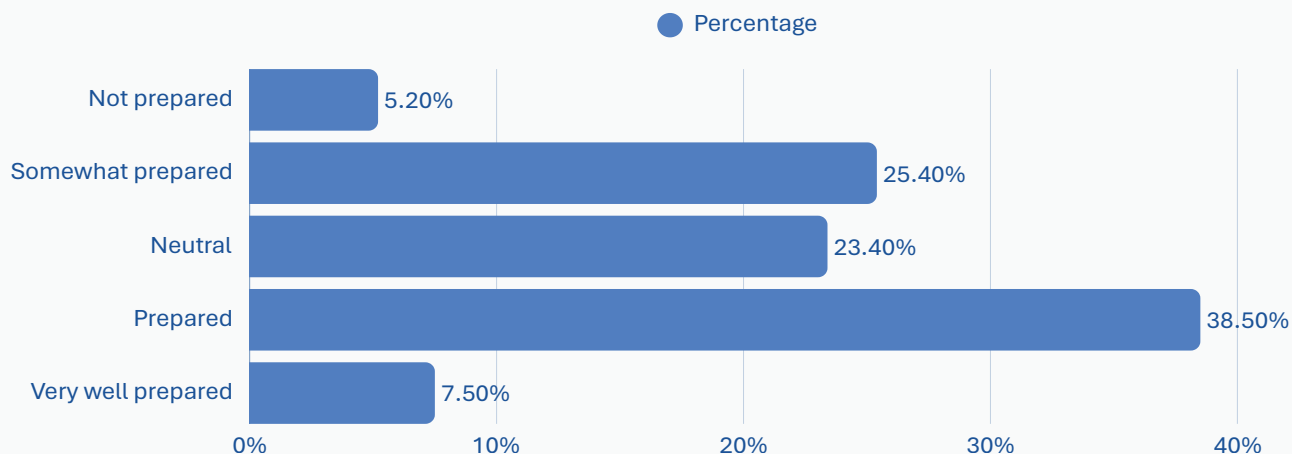
The larger implication is significant. The center of gravity of supply chain risk has shifted from operational disruption to systemic and institutional uncertainty.

The risk landscape is dominated by structural threats. Geopolitical risk ranks highest (weighted score: 0.71), followed by cybersecurity threats (0.44) and climate-related disruptions (0.33), indicating that external systemic forces are now the primary drivers of supply chain volatility.

8. ORGANIZATIONAL PREPAREDNESS FOR MANAGING SYSTEMIC SUPPLY CHAIN RISK

Respondents were asked to assess how prepared their organizations are to manage systemic supply chain risk in 2026.

Figure 5. Organizational Preparedness for Managing Systemic Supply Chain Risk in 2026



Despite high levels of risk awareness, preparedness remains limited. Only 38.5% of organizations report being prepared, while approximately 25.4% are only somewhat prepared. Alarming, fewer than 10% of respondents indicate being very well prepared, underscoring a significant institutional capability gap.

The results indicate a pattern of moderate preparedness, but limited high-confidence readiness. The largest share of respondents classify their organizations as “prepared.” However, only a relatively small proportion indicate that their institutions are “very well prepared.” At the same time, a meaningful number of responses fall into neutral or lower-confidence categories.

This suggests that many organizations have begun responding to the resilience challenge, but far fewer have fully embedded the required systems, capabilities and governance structures.

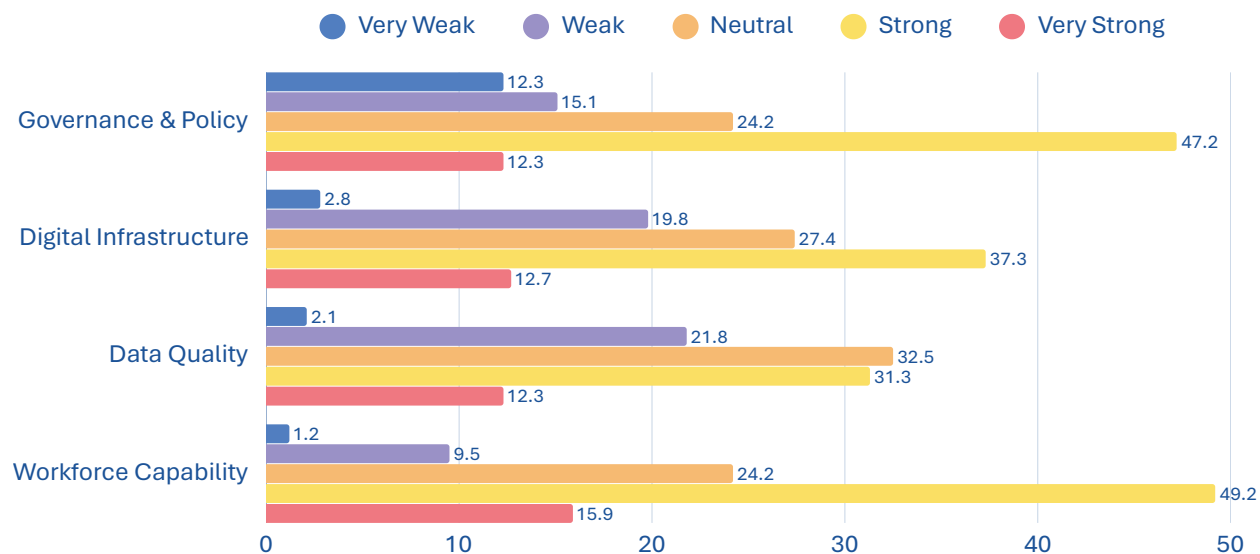
The strategic importance of this finding becomes clearer when compared with earlier results. Respondents show strong awareness of geopolitical, cyber, climate and regulatory risk. Yet this awareness is not matched by equally strong confidence in organizational preparedness.

This reveals a structural gap. Organizations understand the risks they face more clearly than they are institutionally equipped to manage them. That gap is one of the report’s most important findings. It indicates that awareness has advanced faster than integration.

9. INSTITUTIONAL READINESS ASSESSMENT

The survey assessed institutional readiness across five capability dimensions: governance frameworks, digital infrastructure, data quality, workforce capability, and ethics/sustainability.

Figure 6. Respondent Perception on Institutional Readiness



The results reveal a distinctly uneven readiness profile. Governance and policy frameworks perform relatively strongly, suggesting that many organizations have formal structures and institutional intent in place. Workforce capability emerges as the strongest-rated dimension, indicating broad confidence in human skills, adaptability and professional commitment. By contrast, digital infrastructure and systems score more modestly. This suggests partial development, but not full maturity or integration.

Data quality and transparency appear among the weakest capability areas. This is a critical vulnerability, because weak data limits visibility, coordination, predictive capability and informed decision-making. Ethics, sustainability and inclusion perform at a moderate-to-strong level, reflecting growing institutional attention to environmental and social governance, though implementation remains uneven.

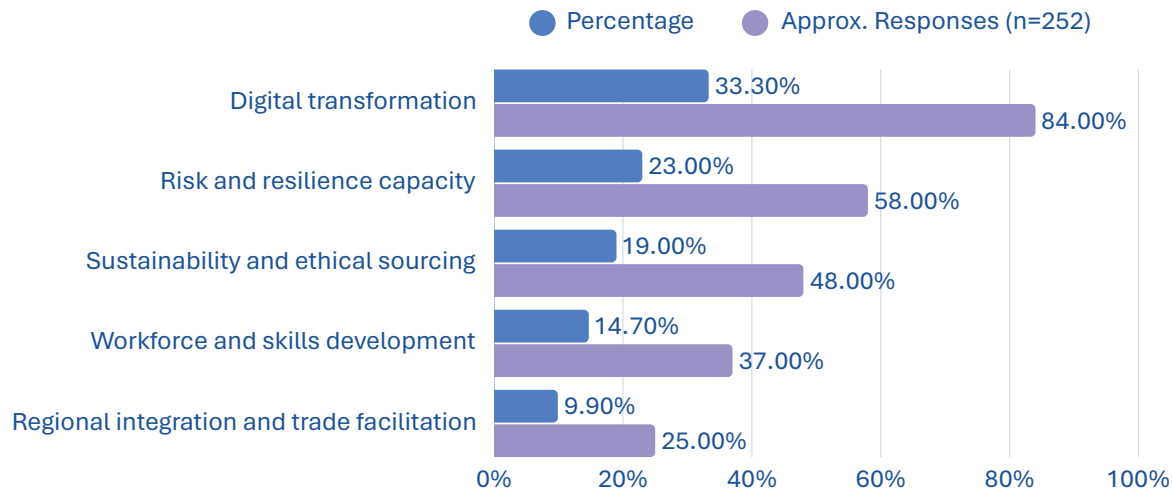
The overall pattern can be summarized simply, many institutions are stronger in policy and people than in systems and data. This imbalance matters. It means that organizations may have the intent, language and leadership framing required for resilience, but still lack the operational infrastructure to act in an integrated and predictive manner.

Readiness is uneven across dimensions. Workforce capability emerges as the strongest area, with approximately 49.2% of organizations reporting strong or very strong capacity, while data readiness remains the weakest, with only 31.3% reporting strong capability and an equal proportion indicating weakness. This reveals a structural imbalance where human capacity outpaces digital and data infrastructure.

10. INSTITUTIONAL PRIORITIES FOR 2026

Respondents were asked to identify the single most important institutional priority for 2026.

Figure 7. Institutional Priorities for 2026



The priority ranking is highly revealing.

Digital transformation emerges as the dominant priority by a clear margin. This shows that respondents increasingly view digital capability as a core enabler of resilience, not merely as a modernization agenda.

Risk and resilience capability ranks second, confirming that organizations understand the need to strengthen their capacity to anticipate, absorb and respond to disruption.

Sustainability and ethical sourcing ranks third, reflecting the continued elevation of environmental and social responsibility within supply chain governance.

Workforce development remains important, but is ranked below digital and resilience priorities. This suggests that respondents recognize the importance of human capability, but increasingly see it as needing to be supported by stronger systems and data.

Regional integration and trade facilitation rank lower, though they remain relevant, especially for African and emerging-market contexts.

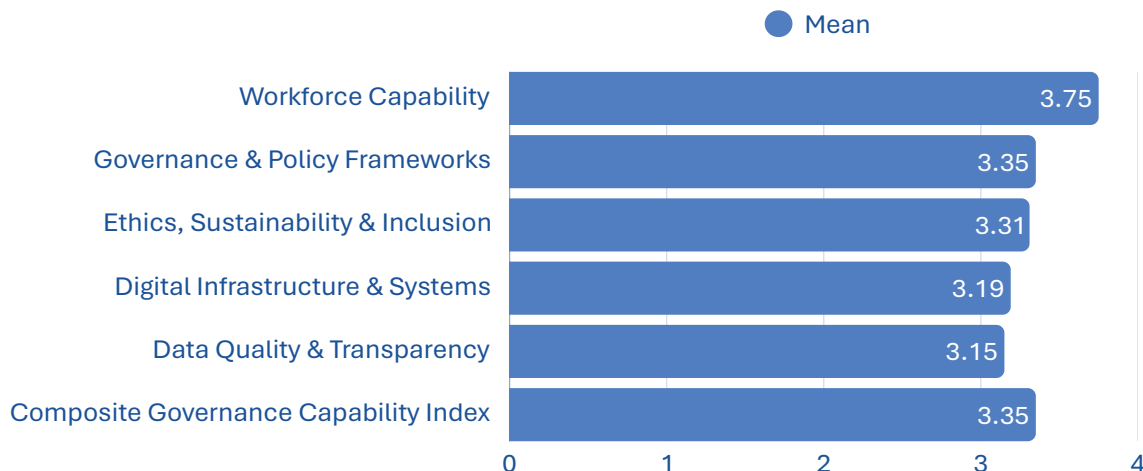
Taken together, the priority profile suggests a major strategic shift. Resilience is increasingly being understood as a function of digital capability, risk management and institutional integration, not policy intent alone.

Organizations are clearly prioritizing transformation. Digital transformation accounts for 33.3% of top strategic priorities, followed by risk and resilience initiatives (23%) and sustainability (19%), reflecting a shift toward long-term capability building rather than short-term efficiency gains.

11. GOVERNANCE CAPABILITY INDEX: MEASURING INSTITUTIONAL MATURITY

To consolidate the institutional readiness assessment, a Governance Capability Index (GCI) was constructed across the five core dimensions of governance capability.

Figure 8. Governance Capability Dimension on Institutional Readiness



The resulting composite score of 3.35 indicates that most institutions are operating at a functional but not fully integrated level of governance maturity.

This is an important distinction.

A functional level of maturity means organizations have foundational structures in place. Policies exist. Skills exist. Governance mechanisms exist. But these elements are not yet consistently integrated into a real-time, data-enabled, enterprise-wide resilience system.

The dimension-level results reinforce this interpretation:

- workforce capability is the strongest area;
- governance and policy frameworks also perform relatively well;
- ethics and sustainability are moderately established;
- digital infrastructure remains weaker; and
- data quality is the most significant constraint.

The central issue, therefore, is not broad institutional weakness. It is incomplete integration. Institutions are not underdeveloped. They are under-integrated. That finding helps explain why many organizations report moderate preparedness despite high levels of risk awareness. They possess pieces of the resilience architecture, but those pieces are not yet fully aligned.

The GCI score of 3.35 indicates that most organizations operate at a moderate level of maturity, functionally capable but not fully integrated. While workforce capability scores highest (3.75), key enabling dimensions such as data quality (3.15) and digital infrastructure (3.19) lag behind, limiting overall system effectiveness.

12. SYNTHESIS: THE RISK–READINESS–GOVERNANCE ALIGNMENT PROBLEM

A central contribution of this report is the identification of a three-part institutional alignment challenge linking risk awareness, organizational preparedness, and governance capability.

12.1 High Risk Awareness

Respondents clearly understand that supply chains in 2026 will remain exposed to geopolitical, digital, environmental and regulatory shocks. Risk is no longer perceived as temporary or exceptional. It is seen as embedded and structural.

12.2 Moderate Preparedness

This awareness is not fully matched by confidence in preparedness. Most institutions appear to be responding, but relatively few appear deeply equipped for systemic disruption.

12.3 Incomplete Governance Integration

Governance capability reflects the same pattern. Strength exists in workforce and policy frameworks, but digital systems and data readiness remain uneven. This limits the ability to convert awareness into coordinated institutional action.

12.4 The Core Tension

The report therefore identifies a defining tension for 2026: organizations have reached awareness maturity, but not integration maturity.

They understand the nature of the risks they face. They recognize the importance of digital capability, sustainability and governance. But many have not yet redesigned their institutions to function effectively under continuous, interconnected disruption.

This produces the report's central diagnosis:

the major challenge for 2026 is not whether organizations understand volatility. It is whether they can govern within it.



13. STRATEGIC IMPLICATIONS

The findings point to a clear strategic conclusion: resilience in 2026 will depend less on reactive operational fixes and more on institutional alignment across leadership, procurement, systems, policy and capability development.

13.1 For Boards and Executive Leadership

Boards and executive teams need to treat supply chain governance as a strategic leadership issue rather than as an operational support issue. Procurement, digital systems, risk management, sustainability and compliance can no longer be governed in separate silos. Executive oversight must shift from tracking performance alone to governing institutional resilience.

13.2 For Procurement Leaders

Procurement leaders must move beyond a narrow cost-control role and operate as strategic governance actors. Procurement now sits at the intersection of suppliers, regulation, contract management, risk, data and institutional accountability. In this environment, procurement is not just a buying function. It is a coordinating function.

13.3 For Public Institutions and Policymakers

Public institutions will play an increasingly decisive role in shaping supply chain systems through regulation, standards, and institutional incentives. As governance expectations expand, regulators themselves must evolve. This requires strengthening regulatory capability, particularly in digital oversight, data governance, and cross-sector coordination. Policy frameworks must move beyond compliance enforcement toward enabling more transparent, resilient, and integrated supply chain systems. In this context, the effectiveness of supply chain governance will depend not only on private sector adaptation, but on the capacity of public institutions to design and sustain coherent regulatory environments.

13.4 For Organizations in Emerging Markets

For organizations operating in Africa and other emerging-market environments, the challenge is not simply adopting new technologies. It is building institutional capability that matches local realities of infrastructure gaps, policy transitions, external volatility and capacity constraints.

The priority is not superficial modernization. It is governance architecture that works under pressure.

THE EXECUTIVE IMPERATIVE

- Supply chains must be governed, not merely optimized
- Procurement and institutions are central to resilience
- Regional integration requires institutional readiness
- Leadership decisions now shape long-term supply chain security

14. CONCLUSION

The AISCR Global Supply Chain Outlook 2026 points to a clear conclusion: supply chains are being reshaped by a new institutional reality.

Volatility is no longer temporary. It is structural.
Risk is no longer peripheral. It is embedded.
Governance is no longer administrative. It is central to resilience.

Respondents consistently expect elevated risk to persist and identify geopolitical instability and cyber threats as the most significant challenges shaping 2026. They also signal that digital capability, sustainability and regulatory oversight are becoming core components of supply chain strategy.

Yet high awareness has not yet translated into full institutional integration.

Preparedness remains moderate. Governance maturity remains uneven. Digital infrastructure and data capability remain weaker than governance intent and workforce strength. The issue, therefore, is not simply that risks are growing. It is that institutional alignment remains incomplete.

The report's central message is therefore straightforward: organizations have reached awareness maturity, but not integration maturity.

The institutions that will succeed in 2026 and beyond will not be those that react fastest to disruption alone. They will be those that build governance systems capable of operating under continuous uncertainty, systems that connect procurement, data, leadership, digital capability, compliance and resilience into a coherent institutional architecture.

In the new supply chain reality, resilience is not just an operational capability. It is an institutional achievement.



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ABOUT AISCR GLOBAL

AISCR Global is an independent research, policy, and capacity-building institute dedicated to strengthening supply chain systems, procurement governance, and institutional capability across Africa and globally. Through applied research, professional education, and strategic partnerships, AISCR works with governments, industry leaders, academic institutions, and development partners to advance evidence-based solutions that enhance transparency, efficiency, and resilience in supply chain systems. AISCR bridges the gap between academic scholarship and real-world implementation, ensuring that research translates into actionable insights, institutional transformation, and sustainable impact.

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