

EASTERN EUROPE: A KEY NEARSHORING HUB FOR SECURE WESTERN SUPPLY CHAINS

Georgeta ILIE⁸,

Institute for World Economy, Romanian Academy

ABSTRACT: *Amid ongoing global disruptions (including geopolitical tensions and trade fragmentation), businesses are increasingly prioritising supply chain security and flexibility. Eastern European countries, members of the European Union, have emerged as strategic nearshoring destinations for Western companies seeking to strengthen supply chain resilience and security while maintaining efficiency. The present analysis tries to identify the ongoing trends revealed in the specialised studies investigating the challenges of global supply chains following the COVID-19 pandemic, confirmed by the recent data of the Regional Integration and Value Chains Analyser (RIVA) developed by the United Nations Economic and Social Commission for Asia and the Pacific. The Eastern European region's advantages (including geographic proximity to Western Europe, cost-competitive labour, and a highly skilled workforce, particularly in manufacturing, engineering, and IT services) enable shorter lead times, lower transportation costs, and improved coordination compared with offshore locations in Asia. As a consequence, the robust industrial ecosystems, supported by investments in infrastructure and digitalisation, and strengthened by foreign direct investment, can enable Eastern European countries to become a nearshoring hub within the reconfiguration of global supply chains, offering Western European companies a balanced alternative that mitigates risk while maintaining competitiveness.*

Keywords: *Global Supply Chains, Nearshoring, Eastern Europe, Resilience, Geopolitical Tensions*

JEL Classification: *F23, F43, F51, O14*

1. INTRODUCTION

Driven by the compounding impact of the COVID-19 pandemic and escalating geopolitical tensions, the global supply chains are undergoing a fundamental transformation (Eurostat, 2025). The recent climate of instability has served as a stress test, revealing the inherent vulnerabilities within long-distance supply chains. Consequently, companies are fundamentally rethinking the global operating models that prevailed for thirty years (OECD, 2021; Liu et al, 2022). The dominant business paradigm historically centred on lean, efficiency-oriented frameworks; specifically, the *just-in-time* model was widely adopted to optimise costs by minimising inventory holdings. However, the pandemic and subsequent geopolitical tensions (including Russian-Ukrainian and Middle East conflicts, as well as new United States trade policy changes) exposed the inherent risks of this optimisation-heavy approach. By creating critical single points of failure, these models ensured that localised disruptions, such

⁸ PhD, Scientific Researcher III, georgeta.ilie@iem.ro.

as factory access in Asia, could paralyse the global production cycle. Consequently, companies are adopting *just-in-case* strategies. By increasing safety stock, they are better equipped to mitigate supply chain volatility and remain responsive to sudden market fluctuations (Banton, 2025). By shifting the focus *from cost-efficiency towards resilience and security*, businesses are increasingly adopting inventory-heavy models to insulate operations against future shortages and market instability.

A key component of this shift is the adoption of *nearshoring* as a strategic risk hedge (Eurostat, 2025). By relocating production closer to the final consumer market, companies can considerably reduce transit times, lower freight costs, and simplify logistics. This approach has gained significant momentum as companies recognise the vulnerability of long-haul routes, such as the Suez Canal or trans-Pacific lanes, to geopolitical and environmental disruptions. Consequently, companies are moving towards regionalising their operations, with businesses in the United States (US) investing in Mexico, which surpassed China as the US's top trading partner in 2023, while European firms increasingly turned to Eastern Europe and North Africa to shorten their supply loops (Maihold, 2025; Brainhub, 2025).

2. NEARSHORING AMONG THE RECONFIGURATION STRATEGIES IN THE TENSIONED GEOECONOMIC CONTEXT

In the post-pandemic geoeconomic climate, characterised by intensifying geopolitical tensions, supply chain fragility, and a focus on national security, multinational corporations and governments have reconfigured global trade and investment through their strategies and policies. Consequently, the traditional just-in-time model, which prioritised cost efficiency above all else, is replaced by a just-in-case approach that emphasises resilience, reliability, and security.

Among the reconfiguration strategies, the shifting of manufacturing or service operations to countries geographically closer to the target markets has emerged, namely, *nearshoring* (Platas-López & Cruz-Mejia, 2025). The main drivers of this strategy are maintaining cost advantages while significantly reducing shipping times and transit risks. However, besides its benefits, such as easier management of logistics, faster response to market demand shifts, and lower carbon footprints associated with long-distance freight, the nearshoring strategy is accompanied by challenges related to the necessity of significant infrastructure capacities in the new host countries, as well as investments to ensure reliability and the complexity of local regulatory environments.

As a response to concerns about economic coercion (including export controls and trade sanctions) and to mitigate the risk of geopolitical leverage by adversaries, *friendshoring* (or ally-shoring) has emerged as a strategy concentrating on supply chain networks within countries that share similar political, economic, and security values (Canosa, 2024; Guhathakurta, 2022). Among the friendshoring benefits are increased stability, alignment on labour and environmental standards, and reduced risk of sudden trade disruptions caused by diplomatic fallout. At the same time, this strategy comes with challenges, the most important being related to the limits of the pool of potential partners and suppliers, which can lead to higher prices and possibly slower innovation cycles due to a more closed ecosystem.

The aims to reduce logistical vulnerability, gain control over critical technologies, and the need to protect intellectual property have created the conditions for *reshoring* strategies, the movement of business operations, primarily manufacturing, back to the company's home country (Fane, 2023). The shortened supply chains, increased oversight, and potential alignment with national industrial policy incentives (as is the case with the US Chips Act) (Kurilla, 2024) are the main benefits of this strategy, also accompanied by the higher labour

and operational costs compared to offshore locations, and a potential shortage of domestic skilled labour or raw materials as its major challenges.

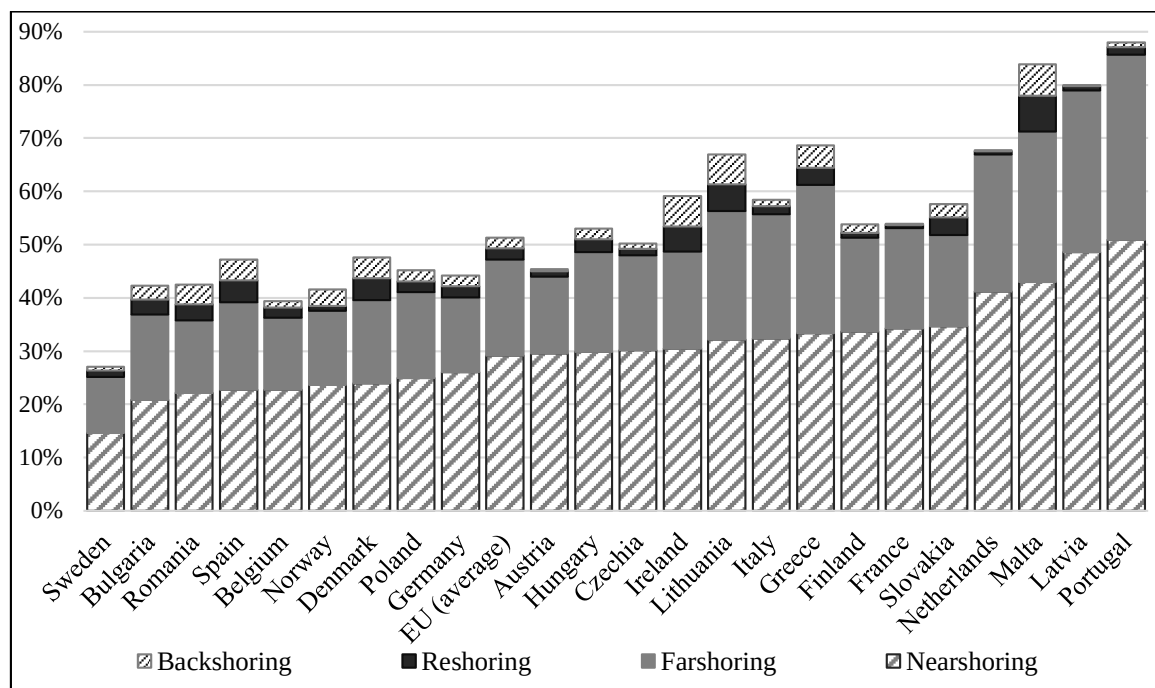
All these strategies are seen as a structural shift toward *glocalisation*, a term created to describe the current fragmented global trade system in which security takes precedence over efficiency (Chhaya, 2026). In terms of fragmentation, global trade tends to move increasingly towards regional blocs sharing common ideologies. At the same time, governments are increasingly acting as architects of supply chains through subsidies, tariffs, and trade agreements, as is the case with the Regional Comprehensive Economic Partnership (ASEAN, 2021) and the European Union - Mercosur Agreement (EC, 2026a), signalling an end to the era of purely market-driven globalisation with policy intervention. Another strategy followed by companies has been the *China Plus One*, where many firms are not fully exiting global markets but are diversifying by maintaining a presence in China while adding capacity in countries such as Vietnam, India, or Mexico to hedge against systemic shocks (FedEx, 2026).

Summarising, the landscape of global supply chain reconfiguration starting with the end of the pandemic crisis has been defined by a *transition from efficiency-first to security-first operations*. Driven by the new US tariff regimes since 2025, geopolitical instability, and the artificial intelligence-led infrastructure boom, companies are actively diversifying their business footprints.

3. NEARSHORING AMONG THE RECONFIGURATION STRATEGIES OF THE EUROPEAN COMPANIES

The European Union's industrial landscape is undergoing a significant reconfiguration of its value chains. Companies are moving away from traditional, *high-distance models* in favour of strategies designed to *strengthen security*. This shift is characterised by a concerted effort to fortify key maritime and land routes while simultaneously cutting back on the logistical risks inherent in relying on distant suppliers (Eurostat, 2025). Faced with constraints in their global value chains, European companies are pursuing a range of strategic pivots. As highlighted in Figure 1, *the most significant shift is towards regionalisation and nearshoring*. This approach involves reorienting production and strengthening supply-side partnerships with countries in closer geographic proximity. The implementation of a *nearshoring* strategy acts as a direct replacement for the more geographically distant, traditional far-shoring frameworks that historically defined external European business partnerships. As companies move to repatriate critical functions, two more strategies have emerged: *reshoring* (returning outsourced activities to domestic partners) and *backshoring* (bringing outsourced activities back to the company). While these practices remain a smaller share of overall activity, they denote a crucial pivot in the way companies approach the management and domestic control of their core operations. Beyond mere cost considerations, European enterprises are increasingly focused on *resilience*, strengthening supply chains by diversifying reliable partners and maintaining larger inventory buffers. Furthermore, they are integrating advanced digital technologies to foster a more transparent and efficient value chain infrastructure (Eurostat, 2025).

Figure 1. Comparative analysis of nearshoring and alternative strategic models, adopted by European companies, during 2021-2023 (% of total companies)



Note: Countries are ordered by the value recorded for nearshoring.

Source: Author's representation based on Eurostat (2025).

As shown in the data in Figure 1, from 2021 to 2023, *European companies prioritised nearshoring* over far-shoring, with the former accounting for 29.2% of strategic implementations compared to just 18% for the latter. A distinct trend has emerged among companies headquartered in Western Europe, marked by a clear strategic move toward nearshoring operations. Evidence suggests a structural transition in European supply chain management, as nearshoring increasingly displaces far-shoring as the preferred strategy for regionalising operations. The increasing preference for nearshoring over far-shoring signals a strategic shift as firms prioritise supply chain resilience and risk management. The strategic relocation of supply bases, closer to points of origin or end-market demand, serves as a critical buffer, shielding businesses from the compounding pressures of logistical bottlenecks and geopolitical uncertainty. Furthermore, the cautious adoption of backshoring and reshoring underscores the logistical complexity and capital requirements associated with repatriation. The transition of specialised functions, whether to internal operations or domestic partners, represents a major structural undertaking that necessitates extensive long-term planning (Eurostat, 2025).

In response to recent economic disruptions and heightened geopolitical instability, European firms have increasingly adopted nearshoring strategies. Their effects are driving a structural realignment, fundamentally altering the investment and trade environment throughout Europe and beyond. Navigating this era of global instability has led companies to prioritise security over pure efficiency. This trend marks a critical recalibration, where the once-dominant focus on low-cost global sourcing is increasingly balanced against the necessity of a stable, secure supply chain (WB, 2025).

Data examining the strategic orientation of European companies, between 2021 and 2023, was primarily determined by their response to external shocks, specifically the pandemic, geopolitical instability, and the energy crisis, as they sought to strengthen the robustness of their global value chains (Eurostat, 2025). The evidence reveals a multifaceted set of pressures

reshaping industry, including heightened costs for energy and raw materials, significant transportation and logistical delays, and chronic material shortages. Compounding these are the long-term disruptions from the pandemic, the operational impact of EU environmental policy, and the economic fallout resulting from sanctions against the Russian Federation.

4. NEARSHORING IN EASTERN EUROPEAN COUNTRIES - A STRATEGIC DECISION CONSIDERING THE GLOBAL VALUE CHAINS' CONSTRAINTS

Despite the challenging post-pandemic economic landscape, Eastern European economies have demonstrated significant resilience. Characterised by strong growth (EC, 2026b) and a three-decade commitment to free trade and international investment, their economic environment provides a stable foundation that significantly enhances their appeal as a *nearshoring hub*. A significant strategic transformation is currently defining the Eastern European economic landscape. The region is steadily distancing itself from its historical reliance on Western industrial sectors, such as the German automotive and manufacturing core, in favour of higher-value-added activities. Through the development of competitive finished goods, these economies are evolving to challenge established markets on the global stage (Bonin, 2025). While Eastern Europe has seen substantial real convergence with Western European economies since European Union (EU) accession, maintaining this growth trajectory will require sustained structural reform to reinforce the region's competitiveness for long-term investment.

An analysis of the operations of Western European multinational enterprises within global value chains offers critical insights into the nature of European integration. Specifically, it reveals the extent of the EU's reliance on extra-EU linkages, which have historically been driven by cost-competitiveness. As firms adopt new corporate strategies, the resulting economic implications will be profound. These findings provide a framework for EU member states to better align their investment, trade, and sustainability policies with the realities of modern global production networks.

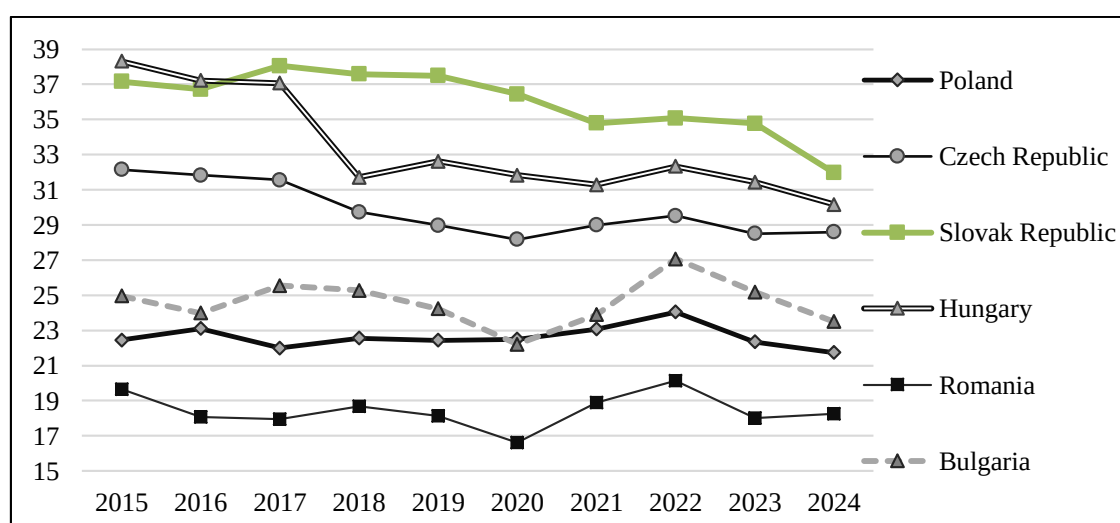
The regional integration and value chains analyzer (RIVA) developed by the United Nations Economic and Social Commission for Asia and the Pacific (UNESCAP) provides critical insights into how countries integrate into global value chains, highlighting how national strategies are evolving in response to current geopolitical pressures.

Our analysis focuses on six Eastern European EU member states, namely Poland, the Czech Republic, the Slovak Republic, Hungary, Romania, and Bulgaria. These countries have achieved a spectacular catch-up process since joining the EU (2004 for the first four, 2007 for Romania and Bulgaria). They have significantly narrowed the gross domestic product (GDP) per capita gap with Western European peers, with Poland, in particular, having emerged as the regional growth leader, with its economy doubling in size since its accession (Kalasopatan Antoine, 2024; Kulbacki, 2026). The region has also transformed from a low-cost manufacturing base to a hub of cognitive and high-skilled labour. Today, the percentage of high-skilled workers in these countries is comparable to that of Western Europe, supported by strong performance in science, technology, engineering, and mathematics (STEM) and information technology (IT) sectors (Gajewska, 2026). In terms of their integration into international trade and global value chains, countries like the Czech Republic and the Slovak Republic are among the most open economies in the EU, with exports accounting for a massive share of their GDP, often driven by the automotive sector. Poland and Romania, by contrast, maintain more balanced models where domestic demand plays a larger role in driving growth (Kalasopatan Antoine, 2024). Historically, these economies established themselves through fabrication and assembly tasks within European value chains (often led by German, Austrian,

and French companies). While this provided the foundation for their industrialisation, a key current challenge is moving up the value chain from simple assembly to research and development, innovation, and higher-value services to escape the middle-income trap.

Considering the RIVA database, these countries are currently adapting to a new strategic environment characterised by nearshoring, leveraging geographical proximity to Western Europe to attract production shifts away from Asia. At the same time, they are focused on increasing the role of the IT sector to move beyond traditional assembly-line manufacturing. Available data up to 2024 does not yet reflect the full impact of recently announced nearshoring initiatives (Figure 2). Accordingly, between 2015 and 2024, all six Eastern European economies experienced slight fluctuations in their *foreign value-added* shares, ultimately trending downward by the end of the decade. Despite these adjustments, relative rankings across the region stayed unchanged. The Slovak Republic presented the highest reliance on foreign inputs in 2024, with foreign value-added representing 31.97% of gross exports, marking a notable decrease from the 38.05% peak observed in 2017. At the other end of the spectrum, Romania reported the lowest figure, with foreign value-added comprising 18.24% of its gross exports. The data reveal a distinct regional split, with the Slovak Republic and Hungary exhibiting a much greater dependence on imported inputs for exports compared to the more self-contained production models of Romania and Poland (Figure 2).

**Figure 2. Foreign value added in CEE exports, during 2015-2024
(% of gross exports)**



Source: Author's representation based on UNESCAP (2026).

The foreign value-added (FVA) component of exports, a key metric for assessing backward linkages, quantifies *the extent to which imported inputs are integrated into domestic production*. This measure further identifies which specific export sectors maintain the highest dependence on foreign-sourced intermediate goods. Moreover, the source of these inputs reveals which economies are most central to the value-added composition of Eastern Europe's export sectors (UNESCAP, 2026). The foreign value-added component of exports provides critical insight into the upstream structure of domestic industries. It captures the value of imported intermediate inputs embedded within Eastern European exports, thereby measuring the intensity of these sectors' dependence on global supply chain linkages (WTO, 2026). Quantifying foreign value-added serves to characterise the integration of Eastern European economies as assembly and processing hubs. Although this status cements their role as critical links in global production networks, it simultaneously exposes a structural weakness; their

downstream position renders them particularly vulnerable to shocks within upstream supply chains.

Regarding the foreign value added embedded in exports, data in Table 1 illustrates the sectoral representativeness for the analysed Eastern European economies, alongside their principal trade partners, in 2024. An analysis of RIVA database metrics *highlights the persistent dominance of transport and electrical equipment within the FVA structures of Eastern European exports*. This pattern is consistent across the region, excluding Bulgaria, where basic metals emerge as the most significant contributor to export value. The data presented in Table 1 underscores the role of these economies as essential nodes within European value chains (EVCs) across the identified sectors. *Germany's structural dominance* is evident in the RIVA data, where it emerges as the top trading partner for every analysed Eastern European economy, contributing the highest share of foreign value-added through backward trade linkages.

Table 1. Eastern European countries: foreign value added in exports, top positions, by sectors and partners, in 2024 (%; USD million)

Countries	Sectors			Partners		
	Sectors	Share of foreign value-added in sectoral gross exports (%)	Value (USD billion)	Partners	Share of gross exports (%)	Value (USD billion)
Poland	Electrical equipment	15.6	16.2	Germany	3.3	15.6
	Transport equipment	13.1	13.6	China	2.2	10.3
	Food and beverages	9.7	10.0	The United States	1.6	7.8
Czech Republic	Transport equipment	38.1	26.2	Germany	5.1	12.4
	Electrical equipment	17.9	12.3	China	2.7	6.4
	Chemicals	9.3	6.4	Poland	2.2	5.3
Slovak Republic	Transport equipment	41.3	16.0	Germany	4.7	5.7
	Electrical equipment	12.4	4.8	Czech Republic	2.5	3.1
	Basic metals	8.2	3.2	China	2.3	2.7
Hungary	Transport equipment	27.4	13.8	Germany	5.5	9.1
	Electrical equipment	22.6	11.4	China	2.3	3.8
	Food & beverages	9.8	4.9	The United States	1.9	3.1
Romania	Transport equipment	19.3	4.8	Germany	2.7	3.7
	Electrical equipment	12.4	3.1	Italy	1.4	1.9
	Inland transport	10.6	2.6	China	1.1	1.5
Bulgaria	Basic metals	14.8	2.2	Turkiye	2.0	1.3
	Petroleum and nuclear	11.7	1.7	Germany	1.7	1.1
	Food & beverages	9.1	1.3	China	1.6	1.0

Source: Author's representation based on UNESCAP (2026).

The quantitative assessment of foreign value-added offers a critical lens on Eastern Europe's integration into global production networks. As Table 1 shows, *these economies remain deeply reliant on European value chains, strengthening their strategic position to navigate and benefit from the accelerating trends of nearshoring and regionalisation*. Amid heightened geopolitical instability and disrupted Asia-Europe trade corridors, the imperative for supply chain resilience has intensified. Against this backdrop, the deep integration of Eastern European economies with Germany, which serves as a vital bridge to Asian markets, underscores the region's growing strategic importance within contemporary global production networks.

The strategic expansion of nearshoring initiatives within Eastern Europe necessitates a granular approach that accounts for the region's diverse industrial specialisations, measured

through domestic value-added, and the geographic orientation of their existing trade linkages (Table 2). An analysis of the RIVA database underscores a *sectoral heterogeneity within the domestic value added of Eastern European economies*. The regional composition is marked by a reliance on basic metals in Bulgaria, Poland, and the Slovak Republic; transport equipment in Hungary and the Czech Republic; and business services in Romania, which stands out as the primary contributor to its export value. According to the RIVA database, *Germany maintains a position of structural dominance* across the region. It consistently serves as the principal trading partner for all analysed Eastern European economies, representing the most significant destination for their domestic value-added via forward linkages (Table 2).

Table 2. Eastern European countries: domestic value added in exports, top positions, by sectors and partners, in 2024 (%; USD million)

Countries	Sectors			Partners		
	Sectors	Share of domestic value-added in sectoral gross exports (%)	Value (USD billion)	Partners	Share of gross exports (%)	Value (USD billion)
Poland	Basic metals	14.5	15.1	Germany	5.0	24.0
	Business services	12.0	12.5	Netherlands	1.6	7.4
	Wholesale trade	9.8	10.1	Czech Republic	1.4	6.6
Czech Republic	Transport equipment	12.8	8.8	Germany	4.5	10.7
	Basic metals	7.3	5.0	Slovak Republic	1.7	4.2
	Electrical equipment	6.8	4.7	Poland	1.2	2.9
Slovak Republic	Basic metals	7.9	3.1	Czech Republic	2.6	3.2
	Business services	5.8	2.2	Germany	2.4	2.9
	Real estate	5.7	2.2	Austria	1.8	2.2
Hungary	Transport equipment	9.0	4.5	Germany	3.4	5.7
	Business services	7.1	3.6	Austria	1.2	2.0
	Electrical equipment	6.7	3.4	Italy	1.0	1.7
Romania	Business services	21.6	5.4	Germany	3.8	5.2
	Inland transport	15.8	3.9	Netherlands	1.8	2.5
	Transport equipment	13.3	3.3	Italy	1.8	2.5
Bulgaria	Basic metals	15.0	2.2	Germany	3.4	1.2
	Business services	10.7	1.6	Italy	1.3	0.84
	Wholesale trade	7.5	1.1	Romania	1.3	0.79

Source: Author's representation based on UNESCAP (2026).

In evaluating the region's potential for nearshoring relocation, our investigation identifies specialised industrial advantages underpinned by the foreign and domestic value-added profiles shown in Tables 1 and 2. Leveraging the benefits of EU integration, regulatory alignment, and proximity to Western European markets, the six economies are differentiated by the following key particularities. (i) Functioning as a central economic pillar for the region, Poland possesses a multifaceted value proposition characterised by advanced logistics, significant market scale, and an evolving reputation as a strategic focal point for innovation, specifically within the domains of research and development, artificial intelligence, and digital infrastructure (Cushman & Wakefield, 2023; Dębska-Pastakia, 2024; Nazarevich, 2025). (ii) Characterised by its profound integration into the European automotive and high-tech value chains, the Czech Republic maintains a strong competitive advantage, driven by its advanced industrial ecosystems and high-calibre engineering expertise (Savills News, 2024; Prague Daily, 2026). (iii) The Slovak Republic serves as a specialised node in the automotive sector, distinguishing itself as a highly competitive location for industrial activities characterised by

high-precision requirements and a reliance on advanced technical labour (EBRD, 2026; Orka Group, 2025; EC, 2026c). (iv) Hungary's industrial profile is characterised by a significant concentration in electronics and battery technologies, a position reinforced by strategic government incentives and a policy framework aimed at supply chain diversification (Bennett, 2026; REFU Hungary, 2024). (v) Romania has emerged as a highly competitive destination, distinguished by its robust IT and business process outsourcing sectors alongside expanding industrial capacity, particularly for firms seeking cost-efficient, EU-integrated talent (Sima, 2024; Arnia Software, 2026; Orka Group, 2025). (vi) Bulgaria is becoming an increasingly attractive destination for businesses seeking lower operational overheads within the European Union, driven by its highly competitive cost structure and a rapidly expanding tech-services sector (EU Legal Gateway, 2026; Ganswindt, 2026).

5. CONCLUSIONS

The strategic shift toward nearshoring in Eastern Europe is founded on value-added integration, characterised by sustained Western companies' investment in local supplier ecosystems and human capital. Beyond the benefits of logistical proximity, the region provides a buffer against supply chain volatility. Nevertheless, this transition is constrained by emerging structural pressures, most notably wage inflation and intensified competition for skilled labour. To remain competitive in the current landscape, European companies are increasingly prioritising automation, digitalisation, and specialised manufacturing, supported by investments in AI-driven production lines and sophisticated, tech-enabled services.

The present reconfiguration of global value chains signifies an evolution toward regionalised and resilient production networks rather than a contraction of global trade. Eastern Europe is uniquely positioned at the centre of this transformation, offering a strategic pathway to bolster European industrial and digital infrastructure. As the focus shifts from basic nearshoring to an era defined by strategic partnerships, high-level technical specialisation, and systemic resilience, the Eastern Europe region is effectively moving from a marginal participant to a primary driver of long-term European competitiveness. In conclusion, from a business perspective, Eastern Europe has become a core component of the European footprint rather than just a peripheral support location. For the region itself, its economic integration provides a mechanism to climb the value chain, shifting from simple assembly to more complex technical roles, which ultimately reinforces its economic strategic relevance within the EU.

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