Insights from IBM Think Circles

The new supply chain equation

Disruption + Autonomy + Ingenuity

"AI is teaching us that how we learned to operate in a supply chain doesn't work anymore. We must change how we think about supply chain as a continuous flow of processes."

At our February 2026 Think Circle event, supply chain leaders made one message unmistakably clear: the operating model that carried the profession through the past decade will not carry it through the next.

Supply chains are entering a new operating reality defined by almost daily global disruption—from macroeconomic volatility and geopolitical instability to accelerating trade and tariff shifts—combined with rapidly advancing AI capabilities and a workforce model that must evolve just as quickly.

Disruption is the new normal

Disruption has become the operating environment. The Think Circle session opened with a candid pulse check of the macroeconomic and geopolitical forces affecting day-to-day supply chain operations. The consensus was unambiguous: disruption is no longer an episodic risk to be managed. It is the baseline condition.

"It's not an 'if' or 'when.' Disruptions are here to stay…We need to be adaptive, flexible, and agile."

Leaders are abandoning the idea of long-term stability and shifting to shorter planning cycles and networks engineered for elasticity. The old formula—predict, plan, optimize—has given way to something more dynamic—sense, adapt, realign.

This is no longer just scenario planning. It is structural redesign. In fact, IBM IBV research shows that 74% of executives report AI is already dissolving traditional geographic and functional boundaries, forcing organizations to rethink the structures those plans sit upon.

Executives increasingly acknowledge that agility now depends on interconnected workflows, not isolated functional responses, a shift reinforced across the broader C-suite. Several Thinkers reported a return to fundamentals such as network redesign, localization, and local-for-local models that prioritize short-term agility over historical cost optimization.

Energy and memory: The hidden structural constraints

"The move toward supporting AI data centers is drastically increasing memory costs and supply pressures for the technology we need."

"Energy is the main bottleneck. To have real advancement in AI, we need a different kind of energy to come into play."

Access to energy and memory components surfaced as underestimated forces that will shape supply chain decisions over the next decade. Both are already being distorted by AI infrastructure demands. These constraints don't just affect operational plans; they directly limit where and how autonomous AI can scale across the enterprise.

Energy is emerging as the hard limit on digital transformation. One Thinker described electrification and automation plans for their truck fleet that stalled not due to budget or technology, but because local grids could not support competing draws from data centers.

The takeaway is that supply chain strategy must now factor in where energy scarcity will determine the feasibility of automation, AI, and network expansion.

Reimagining workflows before deploying technology

Agentic AI requires workflow reinvention, not workflow repair. The discussion turned to the practical realities of AI adoption in supply chain, including where it creates impact, where it falls short, and what it truly takes to scale.

The consensus among the Thinkers was that the biggest risk is applying AI to processes that were never designed for it. Agentic AI, which must operate autonomously across end-to-end workflows, cannot succeed if the underlying process remains fragmented, sequential, or simply outdated.

This challenge is reinforced by IBM IBV research. 82% of C-suite executives reported that siloed functions are no longer tolerable in AI-native enterprise operations. Across industries, leaders are beginning to rebuild processes with end-to-end autonomy in mind, signaling that reinvention is no longer theoretical.

"The conversation we're having is how do we need to change the process to enable AI to do a better job?"

Leaders are moving beyond applying AI to isolated tasks and instead rethinking entire flows. Early trials—from inbound planning to demand-based picking—have shown that AI performs only as well as the process beneath it. The emerging ambition is end-to-end transformation.

This signals a major shift in ambition. Supply chains are moving beyond task automation toward continuous, touchless, cross-functional execution. Looking at processes from end-to-end changes the unit of analysis from the task to the flow.

The question is no longer whether AI improves a single step, but how it can make the entire process continuous, self-correcting, and fundamentally different from the one it replaces. That ambition requires cross-functional alignment, clear data standards, and a willingness to change assumptions that have governed supply chain design for decades.

"Instead of just applying AI to parts of a process, we're looking at how to put it on an end-to-end flow…to make fundamental gains."

The workforce imperative: Ingenuity over execution

"I still don't see the innovation skill of thinking differently coming from AI…We must build efficiency and skills so our people can think innovatively."

While technical skills matter, Thinkers consistently pointed to mindset, adaptability, and creative problem-solving as the true differentiators in an AI-driven supply chain. Speed of change is itself a skill gap. Leadership expectations reflect this shift as 88% say speed, cost efficiency, and adaptive performance are now baseline in an AI-driven operating model.

"Because the pace of disruption is so quick, you are always going to be late. That's a change of mindset we need to build."

"I don't need 50 engineers; I need instant application. That's a different way of thinking. I'm not counting people; I'm counting minutes. It's about speed."

AI optimizes the past; the workforce must imagine what comes next. Beyond change readiness, leaders identified the professional capabilities that AI cannot replicate—most notably, the capacity for genuine innovation.

AI can accelerate execution and elevate insight, but only if organizations invest in the skills that convert that insight into action. Otherwise, the time freed by automation simply fills with more transactional work, and the transformative potential goes unrealized.

Equipping employees to navigate an expanding and rapidly evolving AI landscape is also becoming a core organizational priority. Leaders also surfaced a new requirement of workforce fluency across a broad ecosystem of AI tools. The challenge is less about mastering one tool and more about navigating an expanding ecosystem of AI capabilities.

The supply chain professional of the future will not be a power user of one AI system. They will be a selector, evaluator, and orchestrator of many.

"How do we give our people the competencies to choose the right solution? We need to train our people across the breadth of AI solutions."

Where do AI agents "sit" in the organization?

"People like to personalize AI assistants and agents—even name them—but at the end of the day, it's software algorithms."

"Does it make sense to embed agents into an organizational structure as we would a person, or should they sit outside of that and looked at as a digital application or toolset for the workforce?"

A central design question emerged in the discussion: How should autonomous software agents be architected into the operating model—as embedded workflow technologies or as centrally orchestrated capabilities?

Approaches differed, but the implications are growing clearer. 60% of executives believe agentic AI will bridge organizational silos by 2026, even if teams don't. The fact that this debate is occurring at the operational leadership level reflects how quickly agentic systems are shifting from experimentation to enterprise design.

A profession in reinvention

The insights from this session reveal a profession undergoing its most rapid structural change in decades. Supply chain leaders are not waiting for equilibrium. They are designing for motion—organizations built to sense, decide, and act at a pace traditional models were never expected to handle.

And this reinvention is accelerating: 56% of organizations are already building agentic AI operating models, with 33% in development and 23% already in use.

Agentic AI is not simply a new toolset. It is a forcing function that is redefining workflows, talent models, and operating assumptions.

The supply chains that thrive in the next decade will be the ones that embrace this reinvention today.

What should supply chain leaders do?

Redesign workflows for end-to-end autonomy, not incremental automation.

Leaders should stop applying AI to isolated tasks and instead, rebuild core supply chain flows—planning, fulfillment, logistics, service—as continuous, interconnected processes that AI can execute and optimize in real time.

Engineer supply chain networks for elasticity and structural resilience.

With disruption now the baseline condition, leaders must shift to shorter planning cycles, localized or "local-for-local" designs, and operating models that can sense, adapt, and realign quickly. Energy and memory constraints must be factored into future automation and infrastructure decisions.

Build a workforce capable of orchestrating AI, not competing with it.

Instead of emphasizing technical specialization alone, supply chain organizations should cultivate adaptability, innovation, and the ability to choose and oversee a broad ecosystem of AI tools. Workforce ingenuity becomes the differentiator; AI becomes the accelerant.

For more data and insights, check out:

The enterprise in 2030

The essential guide to agentic AI

Quantum is coming

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