

Mapping the Intellectual Structure of Friendshoring Research: A Bibliometric Analysis of Production Relocation Literature¹

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Abstract: Recent geopolitical tensions, pandemic-related disruptions and changes in global value chains have increased academic and policy interest in friendshoring and related production-relocation strategies. This study examines the development, intellectual foundations, conceptual structure and geographical distribution of the literature on friendshoring, reshoring, nearshoring, backshoring and China Plus One through a bibliometric analysis of Web of Science (WoS) and Scopus records. The initial dataset comprised 753 WoS and 1,042 Scopus records. After three repeated titles in WoS and nine in Scopus were consolidated, 750 and 1,033 unique titles remained, respectively. Title-based matching identified 600 publications indexed in both databases, yielding an integrated corpus of 1,183 unique publications. Performance analysis examined publication growth, source productivity, influential publications, citation impact and country participation, while author-keyword analysis of WoS metadata was used to assess the conceptual structure. The findings show that publication activity accelerated substantially after 2020 and that the field remains intellectually rooted in the established reshoring and offshoring literature. “Reshoring,” “offshoring,” “nearshoring” and “backshoring” form the core conceptual structure, whereas “global value chain,” “manufacturing,” “COVID-19,” “sustainability,” “Industry 4.0” and “industrial policy” link production relocation to resilience, technological change and geopolitics. The geographical distribution is led by the United States and several European countries, while Türkiye has limited visibility. Friendshoring therefore appears to be an emerging extension of the production-relocation literature rather than an entirely new research field. The study concludes by outlining directions for future research on friendshoring and Türkiye.

Keywords: Friendshoring; bibliometric analysis; reshoring; nearshoring; global value chains; international trade

I. Introduction

Global production and supply chains have changed substantially in response to economic, geopolitical and logistical disruptions. For several decades, firms developed international production networks around cost efficiency, labour arbitrage and economies of scale. This model has become more difficult to sustain because of disruptions associated with the COVID-19 pandemic, geopolitical tensions such as the US–China strategic rivalry and Russia’s war against Ukraine, and instability in maritime transport, including volatile freight rates and longer shipping distances (OECD, 2023; UNCTAD, 2025a, 2025b). Multinational enterprises have consequently reassessed the geographical configuration of production and sourcing, making manufacturing location strategically important not only for cost efficiency but also for resilience (Contractor et al., 2010; Ellram et al., 2013).

In response, firms have progressively reconsidered traditional international production strategies and explored alternative configurations for global manufacturing and sourcing. For decades, international production relied heavily on offshoring to lower-cost locations (Contractor et al., 2010). The vulnerabilities exposed by recent disruptions, however, have reduced the appeal of purely cost-based location decisions. Firms are therefore considering alternatives such as reshoring and nearshoring, which refer, respectively, to returning production to the home country and relocating activities to geographically closer countries (Fratocchi et al., 2014; Martínez-Mora & Merino, 2021). China Plus One provides a further diversification strategy: firms retain operations in China while adding production or investment in at least one other country to reduce dependence on a single production base (Enderwick, 2011). Friendshoring is the most recent of these approaches and emphasizes trade and sourcing relationships with countries perceived as trustworthy or as sharing similar values (Javorcik et al., 2024). International production strategies have thus evolved from a narrow focus on efficiency toward a balance among efficiency, diversification, resilience and geopolitical considerations.

Türkiye has gained attention in discussions of global supply-chain reconfiguration because of its geographical position and its potential role as a manufacturing, trade and logistics hub (OECD, 2023). Its economic integration with the European Union, including the Customs Union, and the EU's position as Türkiye's largest trading partner further strengthen this potential (European Commission, 2024). These characteristics may make Türkiye attractive to firms seeking shorter, more diversified and resilient supply chains. Nevertheless, indexed research explicitly examining friendshoring in the Turkish context remains limited; most existing studies focus on the broader geopolitical and economic dimensions of friendshoring (Javorcik et al., 2024; da da Rocha et al., 2025). Production-relocation research, by contrast, shows that firms assess candidate locations using multiple criteria, including operational capabilities, logistics performance, institutional quality, market access and the wider business environment (Andy et al., 2024; Tsai & Urmetzer, 2024). Friendshoring should therefore be treated as a multidimensional location decision in which geopolitical trust is one component of a broader assessment. Examining how firms evaluate candidate countries across these dimensions is an important research agenda in international business and supply-chain management.

Although recent studies have advanced the theoretical understanding of friendshoring as a geopolitical and strategic choice, the literature remains fragmented across friendshoring, reshoring, nearshoring, backshoring and related diversification strategies. Limited evidence is also available on how these research streams have developed, which publications and countries are most influential, and how Türkiye is represented. To address this gap, the present study maps the conceptual structure of friendshoring and adjacent production-relocation research and evaluates the implications for Türkiye.

II. Literature Review

2.1. From Offshoring to Friendshoring

The international offshoring of production has been a defining feature of global value chains, as firms distribute activities across countries to improve efficiency and exploit location-specific advantages. Offshoring involves establishing or transferring value-chain activities abroad and may be internalized through foreign direct investment or externalized through outsourcing to third-party suppliers (Contractor et al., 2010; da da Rocha et al., 2025). Although offshoring has historically been driven largely by economic efficiency, it is also connected to firms' internationalization strategies and the geographical organization of global value chains (Ellram et al., 2013; da da Rocha et al., 2025).

With the increasing extent of global value chains, companies have realized that offshoring activities are not final and can be reversed at some point. The idea of reshoring came into being to describe such reversal of offshoring activities. Depending on the new destination, this relocation may involve moving production to another distant foreign country (further offshoring), transferring it to a foreign country closer to the firm's home country (near-reshoring), or returning it to the home country (back-reshoring) (Fratocchi et al., 2014; Martínez-Mora & Merino, 2021). These relocation paths are defined primarily by changes in geographical location and do not necessarily

involve changes in whether production is performed internally or outsourced. Reshoring should therefore not be understood simply as a retreat from internationalization; rather, it represents a possible phase in firms' long-term international production strategies as they reassess previous location decisions in response to changing costs, risks and competitive conditions (Fratocchi et al., 2014; Martínez-Mora & Merino, 2021).

Among these relocation strategies, backshoring has received considerable attention because it involves returning manufacturing activities to the firm's home country. A systematic review by Stentoft et al. (2016) identifies multiple groups of factors influencing backshoring decisions, including cost, quality, time and flexibility, access to skills and knowledge, risks, market-related considerations and other strategic factors. The review also emphasizes that the motivations for backshoring differ from the original drivers of offshoring, indicating that firms reassess manufacturing locations as competitive conditions evolve.

Nearshoring subsequently emerged as an alternative relocation strategy. Unlike backshoring, it transfers activities to countries geographically closer to the home market while retaining some of the cost advantages of international production. The literature presents nearshoring as combining selected benefits of offshoring, such as lower production costs, with advantages associated with proximity, including shorter delivery distances and closer access to target markets (Piatanesi & Arauzo-Carod, 2019). Da da Rocha et al. (2025) similarly define nearshoring as the relocation of value-chain activities to nearby countries and show that recent research increasingly distinguishes it from earlier forms of regional offshoring.

Friendshoring has attracted growing attention amid heightened geopolitical uncertainty and repeated supply-chain disruptions. Da da Rocha et al. (2025) distinguish nearshoring, which is defined primarily by geographical proximity, from friendshoring, which is based on geopolitical alignment or trust. Their review describes friendshoring as the relocation of value-chain activities to trusted countries to reduce exposure to geopolitical tensions and supply-chain disruption. This approach adds geopolitical considerations to the traditional economic criteria used in manufacturing-location decisions.

Overall, the evolution from offshoring to reshoring, nearshoring and friendshoring demonstrates the multidimensional nature of contemporary manufacturing-location decisions. Efficiency remains important, but firms increasingly consider resilience, risk exposure and geopolitical alignment (Broecke, 2024; da da Rocha et al., 2025).

Table 1. Comparison of International Production Location Strategies

Strategy	Primary logic	Geographic orientation	Main objective
Offshoring	Cost and resource efficiency	Distant foreign locations	Lower production costs and access specialised resources
Reshoring	Reconfiguration of previously offshored activities	Home country or an alternative location	Restore control, improve responsiveness and correct offshoring disadvantages
Backshoring	Domestic reintegration	Home country	Return previously offshored activities to domestic production
Nearshoring	Geographic proximity	Nearby or regional countries	Shorten lead times and improve coordination and flexibility
China Plus One	Geographic diversification	China plus at least one additional country	Reduce excessive dependence on a single production location

Friendshoring	Strategic trust and risk reduction	Politically aligned or otherwise trusted countries	Reduce geopolitical exposure and strengthen supply-chain security
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2.2. Drivers of Firms' Friendshoring Decisions

In addition to the increasingly complex nature of global supply chains, the increasing likelihood of political and economic interruptions has affected the set of criteria that businesses use when making decisions regarding international production and sourcing. No longer based solely on production costs, firms have started taking into account a range of strategic factors associated with supply chain reliability and the external environment. As Javorcik et al. (2024) assert, the growing geopolitical instability and frequent disruptions to global value chains have made policy-makers and businesses reconsider traditional offshoring policies and consider partnering with countries viewed as trustworthy sources of products.

A major driver of these decisions is the need to strengthen supply-chain reliability. Christopher and Peck (2004) argue that globally dispersed supply chains have become increasingly vulnerable as firms depend more heavily on distant suppliers. Greater supply-chain complexity exposes firms to a wider range of risks and requires capabilities that reduce vulnerability and preserve operational continuity during disruptions. Ponomarov and Holcomb (2009) define supply-chain resilience as the capacity to prepare for unexpected events, respond effectively and recover to the original or an improved operational state. They further explain that global sourcing, outsourcing and geographically dispersed logistics can amplify disruption, making resilience an essential capability for modern supply chains.

Firms also evaluate the characteristics of potential host countries. Dunning's (1998) eclectic paradigm—commonly described as the ownership–location–internalization (OLI) framework—holds that foreign direct investment cannot be explained solely by firm-specific advantages. Location advantages are one of its three core components and help explain where multinational enterprises create value. Institutional conditions are also important. Henisz (2000) shows that political risks arising from policy changes, regulatory interventions and other government actions can affect investment profitability and firms' market-entry decisions.

Recent evidence further demonstrates that trade policy can influence firms' sourcing strategies. Hsu et al. (2026) examine stricter regional value-content requirements introduced under the United States–Mexico–Canada Agreement (USMCA). They find that US automotive firms increased the share of affected imports sourced from Mexico and Canada, with no comparable change for products not subject to tighter requirements. The study therefore provides direct evidence that rules of origin can reshape sourcing decisions and encourage regional nearshoring.

Taken together, the literature indicates that friendshoring decisions reflect interactions among supply-chain resilience, location advantages, institutional conditions and trade policy. Existing studies identify many factors that shape international production and sourcing, but they devote less attention to how firms evaluate these factors simultaneously when selecting potential friendshoring locations. This gap motivates the present study.

2.3. Country Attractiveness in Supply Chain Relocation

Production and sourcing relocation requires firms to decide both whether to relocate and where the relevant activities should be located. Country attractiveness is therefore central to international business and foreign direct investment research because location-specific factors shape firms' international development and production strategies. Dunning (1998) argues that multinational activity cannot be explained by ownership and internalization advantages alone. Within the eclectic paradigm, location-specific advantages form an integral part of international production decisions because firms compare the costs and benefits of conducting value-adding activities in different places. The interaction of ownership, location and internalization advantages consequently influences the geography of multinational activity and international investment.

More recent research shows that the determinants of location attractiveness evolve with the international business environment. Andy et al. (2024) systematically reviewed 221 articles published between 1999 and 2023. Their analysis confirms the continuing relevance of traditional determinants such as market size, production costs, infrastructure and natural resources, while identifying innovation, digital transformation, human capital and knowledge-related assets as increasingly important in the post-pandemic environment.

The institutional setting is another relevant aspect of country attractiveness. Henisz (2000) suggests that multinational investment decisions are determined by political risks associated with policy changes, regulatory interventions, and other government actions which can affect the profitability of investments. In addition, the study suggests that firms' evaluation of the institutional environment is important in choosing entry modes since political institutions affect risks related to foreign investments.

Recent research continues the analysis of the role of the institutional setting and differentiates between various aspects of institutions. Using the data on foreign-invested enterprises in China, Che et al. (2023) show that institutional differences between home and host countries have an impact on firms' location decisions. Specifically, they find that firms from countries which are institutionally more distant exhibit higher sensitivity to regional economic institutions' quality when choosing investment locations. Besides, they find that institutional proximity may help firms adapt to the institutional environment in the host country while institutional differences make firms more sensitive to institutional quality at the location decision stage.

Similarly, Nayyar and Luiz (2024) suggest that institutional quality and institutional distance should be considered separately. Analyzing outward foreign direct investments in India, the authors find that institutional quality affects destination choice while institutional distance becomes more important after location decision and, specifically, determines investment scale. The growing importance of institutions has also been emphasized in systematic review studies. Silva et al. (2024) note that institutional distance has become an increasingly important construct in international business because institutions affect firms' interaction with host-country actors, influence transaction and coordination costs, and shape strategic decisions regarding foreign market entry. Reviewing the literature on equity-based entry modes, the authors conclude that institutional differences remain a central factor explaining firms' international expansion decisions and identify institutional distance as one of the dominant analytical perspectives in contemporary entry mode research.

Finally, recent relocation research suggests that evaluating country attractiveness requires a broader decision framework than those traditionally adopted in international business. Based on a systematic review of 158 studies, Tsai and Urmetzer (2024) argue that manufacturing relocation decisions are influenced by multiple interconnected decisional elements rather than a single economic rationale. They further contend that established theoretical perspectives, including transaction cost economics, the resource-based view and the eclectic paradigm, provide valuable explanations but do not fully capture newer considerations such as supply chain resilience, geopolitical developments and managerial decision processes. Accordingly, they propose a comprehensive relocation framework that integrates the consideration, decision and evaluation stages of manufacturing relocation.

Taken together, the reviewed literature indicates that country attractiveness in supply chain relocation extends beyond conventional location advantages. While economic conditions continue to influence international investment decisions, contemporary research increasingly highlights the importance of institutional quality, institutional distance, innovation capacity, digital capabilities and broader strategic considerations in shaping firms' location choices. These developments provide an appropriate theoretical basis for examining how firms evaluate Türkiye as a potential friendshoring destination.

2.4. Türkiye's Potential Position in Reconfigured Supply Chains

Recent studies on manufacturing relocation indicate that contemporary location decisions are increasingly shaped by geopolitical developments, supply chain resilience and regional integration in addition to traditional efficiency considerations. da Rocha et al. (2025) note that the recent literature on near-shoring and friend-shoring has

increasingly examined how disruptive events, geopolitical tensions and changing global value chains influence firms' relocation decisions. Their review further shows that studies in this field commonly analyse location decisions through international business perspectives, particularly the Eclectic Paradigm, while emphasizing that geopolitical considerations have become more prominent in recent relocation decisions.

The OECD (2023) identifies the Middle Corridor as an alternative Eurasian transport route that has attracted renewed attention following disruptions to the Northern Corridor after Russia's invasion of Ukraine. The route connects China and Europe through Central Asia, the Caspian Sea, the South Caucasus and Türkiye. The report identifies opportunities for economic development along the corridor but also emphasizes that congestion, fragmented regulation, limited coordination and logistics bottlenecks constrain its competitiveness.

The OECD report emphasizes regional integration, transport infrastructure, trade facilitation and cross-country coordination as prerequisites for realizing the Middle Corridor's potential. It also identifies underdeveloped logistics services in parts of the corridor and recommends harmonized customs procedures, digitalization and stronger regional cooperation.

The OECD Economic Surveys: Türkiye 2025 describes Türkiye as one of the OECD's fastest-growing economies over the past decade but identifies structural constraints on long-term competitiveness. These include weak productivity growth, limited innovation performance, low participation in lifelong learning and insufficient business dynamism. The report recommends measures to strengthen innovation, skills, trade integration and the business environment (OECD, 2025).

The European Commission (2024) describes Türkiye as a strategic partner and reports that it was the EU's fifth-largest trading partner in 2023, with bilateral trade exceeding EUR 206 billion. The same report notes that accession negotiations have remained at a standstill since 2018 and identifies continuing concerns regarding democracy, the rule of law and judicial independence. Nevertheless, the EU and Türkiye continue to cooperate in areas of mutual interest, including trade, transport, research and innovation.

These facts expand the criteria that need to be considered when evaluating the attractiveness of Türkiye as a production and relocation destination. Besides traditional factors such as market access, infrastructure, and costs of production, today the position of Türkiye depends on innovation capacity, digital transformation, human capital, knowledge assets, and ICT infrastructure (Andy et al., 2024).

Rather than attributing manufacturing relocation to a single factor, current research emphasizes the simultaneous consideration of multiple criteria. Based on a systematic review of 158 studies, Tsai and Urmetzer (2024) show that manufacturing-relocation decisions involve interconnected stages and diverse strategic, operational and environmental considerations. Their review confirms the continuing relevance of transaction cost economics, the resource-based view and the eclectic paradigm while identifying newer concerns that require further research.

2.5. Research Gap and Conceptual Framework

Despite substantial progress in manufacturing-relocation research, important gaps remain in relation to friendshoring and country selection. Previous studies have focused mainly on the conceptual and economic implications of friendshoring and the emerging drivers of international production networks (Javorcik et al., 2024; da da Rocha et al., 2025). Manufacturing-relocation research has generally examined location decisions through established frameworks such as the eclectic paradigm, transaction cost economics and institutional theory (Dunning, 1998; Henisz, 2000; Tsai & Urmetzer, 2024). These perspectives explain why firms relocate and which country-level factors influence their choices, but they have not yet been fully integrated into friendshoring research.

Recent reviews associate country attractiveness increasingly with innovation capability, digital infrastructure, institutional quality and human capital, alongside traditional determinants such as market size, production costs and physical infrastructure (Andy et al., 2024). Empirical studies also show that political institutions, institutional quality and institutional distance influence international location decisions (Che et al., 2023; Nayyar & Luiz, 2024;

Silva et al., 2024). These studies, however, generally examine country attractiveness from the perspective of foreign direct investment rather than friendshoring.

International reports identify Türkiye as an important production and logistics location because of its geographical position, manufacturing capabilities and links with European markets (European Commission, 2024; OECD, 2023, 2025). However, these reports focus primarily on macroeconomic and policy conditions and do not examine how firms assess Türkiye when making friendshoring decisions.

The literature has therefore not yet provided an integrated account of the theoretical foundations, major themes and geographical distribution of friendshoring and related relocation research. This study addresses that gap through a bibliometric analysis combining Web of Science and Scopus records. It examines the field's development, influential publications, leading sources and countries, dominant concepts and implications for future research on Türkiye's friendshoring potential.

III. Bibliometric Methodology

The rapid expansion of scientific output has increased the need for systematic methods that can organize, evaluate and interpret large bodies of scholarly knowledge. Bibliometric analysis responds to this need by applying quantitative and statistical techniques to bibliographic data. It enables researchers to examine the distribution of publications across authors, sources, subjects, countries and document types and to identify the development, influential contributions and structural characteristics of a research field (Lawani, 1981; Okubo, 1997). Unlike a traditional narrative review, which relies primarily on the qualitative interpretation of selected studies, bibliometric analysis provides a systematic and reproducible overview of a field based on patterns embedded in publication metadata.

The term *bibliometrics* was introduced by Pritchard (1969) to describe the application of mathematical and statistical methods to books and other forms of scholarly communication. Although the systematic use of bibliometric indicators became more widespread during the twentieth century, earlier attempts to quantify scientific literature can be traced to studies examining the historical development and disciplinary distribution of publications (Okubo, 1997). Contemporary bibliometric studies extend these early applications by identifying influential publications and authors, measuring citation impact, examining the distribution of scientific production and mapping relationships among concepts, institutions and countries (Donthu et al., 2021; Zupic & Čater, 2015).

In the present study, bibliometric analysis was used to complement the narrative literature review and position friendshoring within the broader intellectual development of production-relocation research. This approach makes it possible to evaluate the growth and influence of the literature while also revealing its conceptual and geographical structure. Accordingly, bibliographic records exported from Web of Science (WoS) and Scopus were analysed through performance indicators and science-mapping techniques. The bibliometric findings were interpreted together with the theoretical literature because bibliometric analysis provides a structured representation of a research domain but does not replace conceptually informed scholarly interpretation (Donthu et al., 2021; Zupic & Čater, 2015).

3.1. Data Sources, Search Strategy and Screening

The database searches covered friendshoring and adjacent production-relocation concepts using the query: "friendshoring" OR "friend-shoring" OR "backshoring" OR "nearshoring" OR "reshoring" OR "China Plus One". The exports contained 753 WoS records and 1042 Scopus records. No subject-based record exclusion was applied; therefore, the bibliometric calculations and the WoS network map represent the complete exported search sets. Title normalization identified three repeated WoS records and nine repeated Scopus records within the export files. After these within-database repetitions were consolidated, WoS contained 750 unique titles and Scopus contained 1,033 unique titles. Exact normalized-title matching then identified 600 titles shared by the databases, producing 1183 unique publications for the integrated performance analysis ($750 + 1,033 - 600 = 1,183$).

The database searches were conducted on 25 July 2026. In the Web of Science Core Collection, the search was performed in the Topic field using the query TS = (“friendshoring” OR “friend-shoring” OR “backshoring” OR “nearshoring” OR “reshoring” OR “China Plus One”). In Scopus, the equivalent query was applied to the title, abstract and keyword fields using TITLE-ABS-KEY (“friendshoring” OR “friend-shoring” OR “backshoring” OR “nearshoring” OR “reshoring” OR “China Plus One”). Offshoring was not included as an independent search term because the study focused specifically on friendshoring and subsequent production-relocation or diversification strategies. No restrictions were imposed regarding document type or publication language. WoS records were exported in plain-text format with full records and cited references. The Scopus records were exported separately in CSV format and subsequently integrated with the WoS records through normalized-title matching.

Table 2. Database Screening and Integration

Stage	WoS	Scopus	Integrated set
Initially exported	753	1042	-
Within-database repeated titles	3	9	-
Unique titles after internal consolidation	750	1033	-
Titles shared by WoS and Scopus	-	-	600
Unique publications analyzed	-	-	1183

Note. No topical records were excluded. Matching was performed using lower-cased, punctuation-free titles. The integrated total was calculated as 750 unique WoS titles + 1,033 unique Scopus titles – 600 shared titles = 1,183 publications. WoS metadata were retained for shared records because the WoS export contained cited references, author keywords and affiliations.

3.2. Analytical Procedures

Performance analysis covered annual publication output, document type, source productivity, author productivity, citation impact and geographic distribution. Science mapping focused on author-keyword co-occurrence and country participation. Citation counts are database- and retrieval-date-dependent and therefore indicate visibility within the exported corpus rather than an immutable measure of quality. VOSviewer is suitable for constructing and visualizing bibliometric networks (van Eck & Waltman, 2010); however, because the supplied Scopus export did not contain author keywords, affiliations or cited references, keyword and country analyses were based on the richer WoS metadata, whereas the integrated WoS-Scopus set was used for publication, source and citation indicators.

Science-mapping analyses were conducted using VOSviewer version 1.6.21 and the full-counting method. The author-keyword co-occurrence analysis was based on WoS metadata because the supplied Scopus export did not contain the metadata fields required for network construction. The minimum occurrence threshold was set at five; of the 1,888 author keywords identified in the WoS records, 85 met this threshold. Keyword case was normalized for the descriptive frequency analysis. However, the optional VOSviewer thesaurus field was left blank, and no thesaurus file was used to merge lexical or orthographic variants in the network map. For the country co-authorship analysis, the minimum number of documents per country was set at three and the minimum citation threshold was set at zero. Full counting was used so that each participating country received one full publication count for internationally co-authored documents. The document-citation, author-keyword and country co-

authorship maps were generated exclusively from WoS metadata, whereas the integrated WoS–Scopus corpus was used for publication, source and citation-based performance indicators.

IV. Bibliometric Findings

4.1. Publication Growth and Source Structure

The integrated corpus spans 1974–2026. Publication activity was limited before 2010 but accelerated sharply after 2020. Publications from 2023 onward account for 48.4% of the corpus. The 2026 count should be interpreted as provisional because the search was conducted before the end of the calendar year. This temporal pattern indicates that friendshoring entered an already established reshoring/nearshoring stream and intensified the field’s geopolitical orientation after pandemic-related and strategic trade disruptions.

Table 3. Temporal Distribution of the Integrated Corpus

Period	Publications	Share (%)
1974-1999	25	2.1
2000-2009	30	2.5
2010-2014	111	9.4
2015-2019	216	18.3
2020-2022	228	19.3
2023	140	11.8
2024	137	11.6
2025	176	14.9
2026*	120	10.1

The source distribution is highly dispersed. No single outlet accounts for more than 2.5% of publications, showing that production relocation is discussed across operations management, supply chain management, international business, economics, trade policy and practitioner-oriented manufacturing outlets. Operations Management Research and the Journal of Purchasing and Supply Management are among the most visible scholarly outlets, while the presence of Assembly and Manufacturing Engineering reflects the field’s practice-oriented origins.

Table 4. Most Productive Sources in the Integrated Corpus

Source	Publications	Share (%)
Assembly	28	2.4
Operations Management Research	22	1.9
Manufacturing Engineering	21	1.8
Journal Of Purchasing And Supply Management	16	1.4
Bringing Jobs Back To The Usa: Rebuilding America'S Manufacturing Through Reshoring	13	1.1
Reshoring Of Manufacturing: Drivers, Opportunities, And Challenges	11	0.9
British Journal Of Management	11	0.9
Global Trade And Customs Journal	10	0.8

International Journal Of Production Economics	10	0.8
Mirovaya Ekonomika I Mezhdunarodnye Otnosheniya	9	0.8

4.2. Intellectual Influence and Leading Contributors

The corpus accumulated 16,291 database citations ($M = 13.77$; median = 2), although 437 records had not yet received a citation. The most influential publications are rooted primarily in the reshoring and manufacturing-location literature. Ellram et al. (2013), Gray et al. (2013), Kinkel and Maloca (2009), and Fratocchi et al. (2014) form a central intellectual base concerned with location decisions, reshoring definitions, antecedents and supply-chain implications. Luciano Fratocchi is the most prolific contributor in the integrated corpus, followed by Harry Moser and Per Hilletoft. These patterns show that the literature's intellectual foundation precedes the emergence of friendshoring and is anchored in operations and supply-chain relocation research.

Table 5. Ten Most Cited Publications in the Integrated Corpus

Publication (first author, year)	Source	Citations
Ellram, Tate, and Petersen (2013): Offshoring and Reshoring: An Update on the Manufacturing Location Decision	Journal of Supply Chain Management	307
Gray, Skowronski, Esenduran, Johnny Rungtusanatham (2013): The Reshoring Phenomenon: What Supply Chain Academics Ought to know and Should Do	Journal of Supply Chain Management	249
Kinkel and Maloca (2009): Drivers and antecedents of manufacturing offshoring and backshoring-A German perspective	Journal of Purchasing and Supply Management	248
Fratocchi, Di Mauro, Barbieri, Nassimbeni, Zanoni (2014): When manufacturing moves back: Concepts and questions	Journal of Purchasing and Supply Management	237
Kinkel (2012): Trends in production relocation and backshoring activities Changing patterns in the course of the global economic crisis	International Journal of Operations & Production Management	195
Fratocchi, Ancarani, Barbieri, Di Mauro, Nassimbeni, Sartor, Vignoli, Zanoni (2016): Motivations of manufacturing reshoring: an interpretative framework	International Journal of Physical Distribution & Logistics Management	183
Tate, Ellram, Schoenherr, Petersen (2014): Global competitive conditions driving the manufacturing location decision	Business Horizons	180
Dachs, Kinkel, Jäger (2019): Bringing it all back home? Backshoring of manufacturing activities and the adoption of Industry 4.0 technologies	Journal of World Business	176
Ancarani, Di Mauro, Mascali: Backshoring strategy and the adoption of Industry 4.0: Evidence from Europe	Journal of World Business	169
Faber (2020): Robots and reshoring: Evidence from Mexican labor markets	Journal of International Economics	155

Beyond the citation rankings presented in Table 5, the document-level citation network provides a relational view of the field's intellectual structure. Figure 1 visualizes the citation connections among the most influential

publications in the WoS corpus. Larger nodes represent publications with greater citation weight, whereas the links indicate citation relationships among documents.

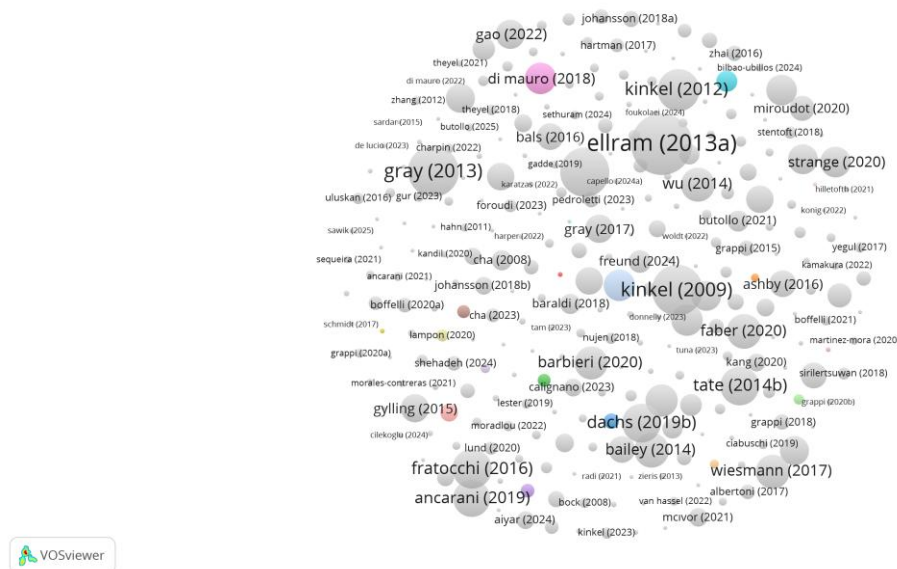


Figure 1. Document Citation Network of the WoS Corpus

The network confirms that the intellectual core of the field is organized around foundational studies on reshoring, backshoring and manufacturing-location decisions. Publications by Ellram et al. (2013), Kinkel and Maloca (2009), Gray et al. (2013) and Fratocchi et al. (2014) occupy prominent positions, whereas more recent studies extend this established knowledge base toward resilience, regionalization and geopolitical considerations. Having identified the field's principal intellectual foundations, the analysis now turns to its conceptual and geographic structure.

4.3. Conceptual and Geographic Structure

After case normalization, the dominant author keywords were reshoring, offshoring, nearshoring and backshoring. Global value chains, manufacturing, China, COVID-19, sustainability and Industry 4.0 also appeared frequently. Friendshoring was less frequent than the older relocation concepts, confirming that it remains an emerging substream rather than a mature, self-contained field. Conceptually, the keyword structure connects three layers: (a) relocation strategy, represented by reshoring, nearshoring and backshoring; (b) operational transformation, represented by manufacturing, outsourcing and Industry 4.0; and (c) systemic risk and governance, represented by global value chains, COVID-19, sustainability, industrial policy and friendshoring. This supports treating friendshoring as a multidimensional location decision embedded in the broader relocation literature.

Table 6. Leading Author Keywords in the WoS Corpus

Keyword	Frequency
Reshoring	273
Offshoring	116
nearshoring	81
Backshoring	67
Global value chains	54

manufacturing	39
outsourcing	34
Sustainability	32
Friendshoring	25
Covid-19	24
Industrial policy	23
China	22

Frequency counts identify the most visible concepts but do not reveal how these concepts are connected. Figure 2 therefore presents the author-keyword co-occurrence network of the WoS corpus. Node size indicates keyword frequency, link strength reflects the intensity of co-occurrence, and colours distinguish thematic clusters identified by VOSviewer.

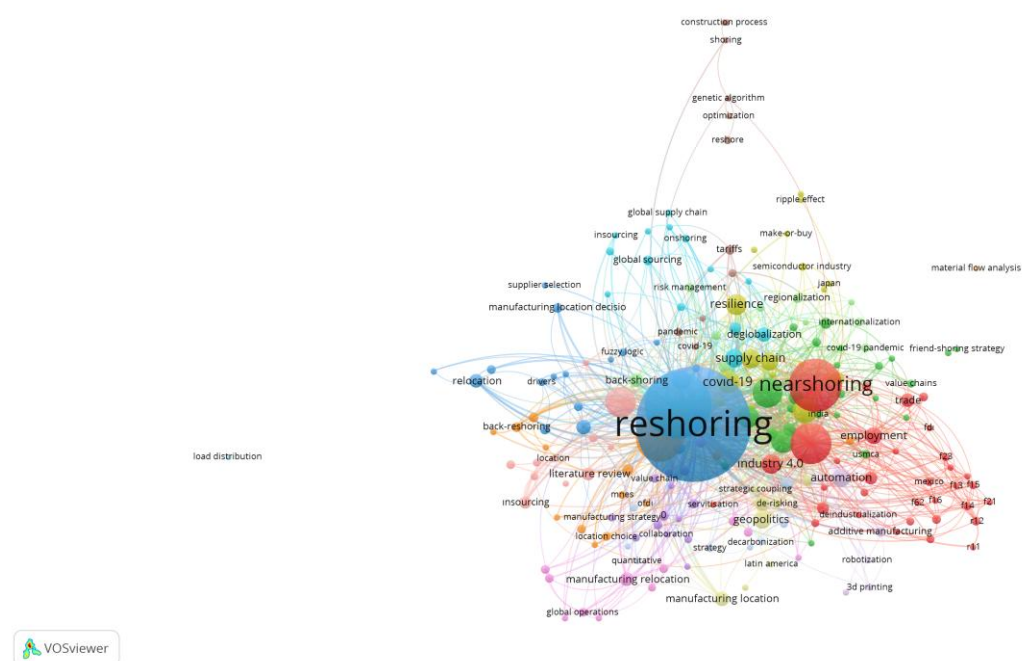


Figure 2. Author-Keyword Co-occurrence Network of the WoS Corpus

Figure 2 shows that reshoring forms the largest and most central node, connecting the principal thematic clusters of the literature. Nearshoring, backshoring, supply chain, global sourcing, resilience, Industry 4.0 and global value chains are positioned around this core. Friendshoring appears as a smaller and more peripheral concept, supporting the conclusion that it has not yet developed into an autonomous research domain. Instead, it is conceptually embedded in the broader literature on production relocation, supply-chain resilience, regionalization and geopolitical risk.

While the keyword network reveals the conceptual organization of the field, institutional affiliations provide evidence on its geographic concentration. The country-level publication and collaboration results are presented in Table 7 and Figure 3.

The geographic analysis of WoS affiliations shows the strongest participation from the United States, Italy, the United Kingdom, Sweden, China, Germany and Spain. Türkiye does not appear among the leading countries. This finding reinforces the empirical relevance of examining Türkiye: despite its manufacturing base, customs-union relationship with the European Union and logistics position, it remains underrepresented in the indexed knowledge structure of friendshoring and adjacent relocation research. Because the full WoS export was retained, the network map also contains a small, peripheral construction-engineering cluster associated with terms such as shoring, reshore and construction process. This cluster reflects the technical homonymy of the search term rather than the conceptual core of production relocation and should be identified as such when the map is interpreted.

Table 7. Leading Countries by WoS-Affiliated Publications

Country	Publications	Share of WoS corpus (%)
United States	167	22.3
Italy	113	15.1
United Kingdom	88	11.7
Sweden	62	8.3
China	59	7.9
Germany	55	7.3
Spain	50	6.7
Mexico	36	4.8
Russia	24	3.2
India	22	2.9

Publication counts indicate the volume of national participation, whereas the collaboration network reveals how countries are connected through co-authorship. Figure 3 presents the country co-authorship network based on

WoS author affiliations. Larger nodes indicate greater publication participation, links represent international co-authorship relationships, and colours identify collaboration clusters.

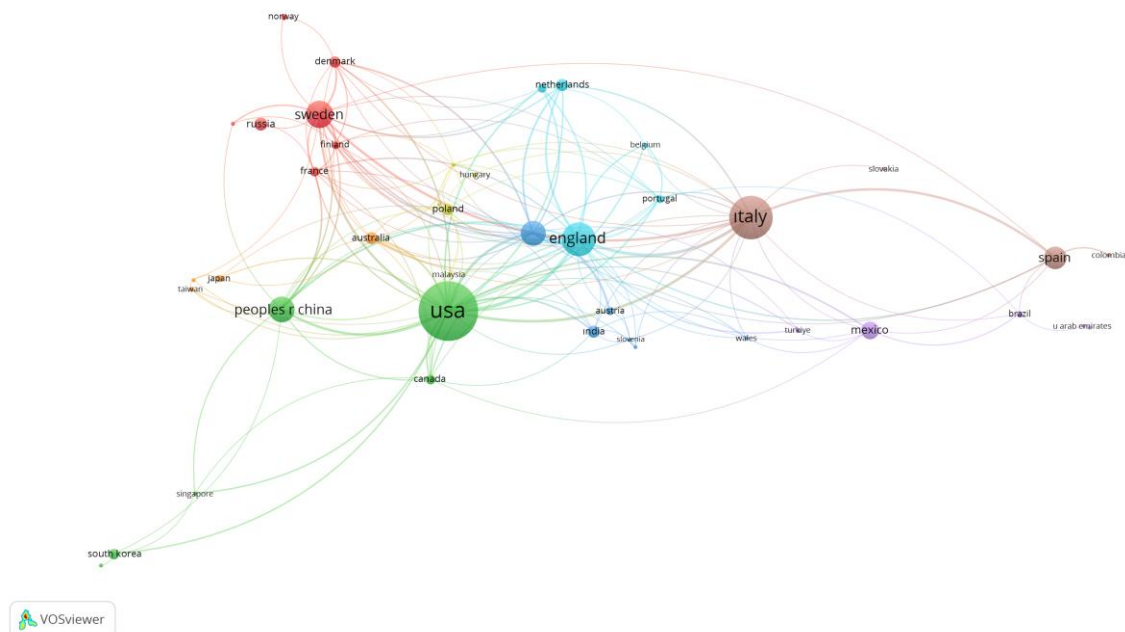


Figure 3. Country Co-authorship Network of the WoS Corpus

The network confirms the central roles of the United States, Italy, the United Kingdom, Sweden and China in the international development of the field. Türkiye appears as a relatively small and peripheral participant, indicating that its practical relevance as a manufacturing and logistics location has not yet been matched by comparable visibility in the indexed research network. Taken together, the citation, keyword and country networks reveal a field grounded in established reshoring research, increasingly connected to resilience and geopolitical themes, but geographically concentrated and still limited in its treatment of Türkiye. These patterns provide the basis for the discussion that follows.

V. Discussion and Implications

The bibliometric evidence refines the conceptual framework in three ways. First, the dominance of reshoring and offshoring shows that friendshoring should be analyzed as part of a family of location-reconfiguration strategies rather than as an isolated geopolitical label. Second, the simultaneous prominence of global value chains, manufacturing, sustainability, technology and industrial policy indicates that firm decisions combine operational capability with institutional and geopolitical considerations. Third, the limited visibility of Türkiye reveals a contextual gap between the country's policy relevance and its representation in indexed research. Accordingly, the conceptual framework retains five interrelated dimensions: geopolitical trust, supply-chain resilience, location-specific operational advantages, institutional and macroeconomic stability, and future competitiveness.

The findings also reveal a disciplinary imbalance in the development of the field. Although friendshoring and related relocation strategies directly affect the geographical organization of trade, investment and production networks, the literature has developed predominantly within operations management, supply chain management and manufacturing studies. The prominence of resilience, manufacturing, sustainability and technological transformation demonstrates the operational orientation of the field, whereas tariffs, rules of origin, preferential trade agreements, customs procedures and trade-facilitation mechanisms remain comparatively less visible.

Consequently, explaining friendshoring solely as a supply chain response to geopolitical uncertainty may overlook the formal trade-policy instruments and logistics conditions through which production relocation is implemented. This imbalance provides the basis for evaluating the bibliometric findings from a more explicit international trade and logistics perspective in the following section.

VI. Evaluation from an International Trade and Logistics Perspective

6.1. Representation of International Trade Themes in the Literature

Although friendshoring and related production-relocation strategies directly concern the geographical reorganization of international trade, the bibliometric findings show that the literature remains predominantly rooted in manufacturing-location and supply-chain management research. In the WoS corpus, the most frequent author keywords are *reshoring* (273 occurrences), *offshoring* (116), *nearshoring* (81) and *backshoring* (67). By comparison, concepts directly associated with the institutional architecture of international trade appear less prominently. *Global value chains* occurs 54 times and *industrial policy* 23 times, whereas tariff policy, rules of origin, preferential trade arrangements, export controls and investment-screening mechanisms do not rank among the leading author keywords.

This distribution reveals an important asymmetry in the literature. Production relocation is extensively discussed as a strategic, operational and supply-chain decision, but the trade-policy mechanisms through which relocation takes place receive less systematic attention. Friendshoring decisions are not implemented solely through managerial preferences for trusted countries. They are also shaped by tariffs, preferential market access, rules of origin, regional value-content requirements, export restrictions, investment incentives and regulatory compatibility. The limited visibility of these concepts in the keyword structure suggests that the literature has not yet fully integrated the analytical instruments of international trade into friendshoring research.

The rapid increase in publications after 2020 further reinforces this interpretation. Publications issued from 2023 onward constitute 48.4% of the integrated corpus, indicating that the field has responded quickly to recent geopolitical and supply-chain disruptions. Nevertheless, the thematic structure remains more strongly associated with resilience, manufacturing relocation and technological transformation than with the formal institutions governing international trade. Future research should therefore move beyond describing geopolitical fragmentation and examine the specific trade-policy instruments through which friendshoring and de-risking strategies are implemented.

6.2. Relocation Strategies and the Reconfiguration of Trade Flows

The four principal relocation strategies represented in the literature have different implications for international trade flows. Reshoring and backshoring involve the partial or complete return of previously relocated production activities to the home country. These strategies may reduce imports of particular intermediate or final goods, but they do not necessarily eliminate international dependence. Relocated production may continue to rely on imported machinery, energy, raw materials and technologically advanced intermediate inputs. Consequently, the effect of reshoring on trade should be evaluated through changes in both gross trade and foreign value-added content rather than through changes in final-goods imports alone.

Nearshoring primarily changes the geographical origin of imports. Production is transferred from a distant location to a nearby or regional economy, but cross-border trade continues. Its principal effect is therefore likely to be trade diversion rather than trade elimination. The strong representation of Mexico in the corpus and the visibility of concepts such as regionalization, the USMCA and manufacturing-location decisions reflect the prominence of the United States–Mexico production system in nearshoring research. Mexico appears in 36 WoS-affiliated publications and is among the ten leading countries in the geographic structure.

The feasibility of nearshoring depends not only on geographical proximity but also on preferential trade arrangements and compliance with rules of origin. A nearby production location may not generate a tariff advantage if its products fail to meet regional value-content requirements. Rules of origin consequently influence supplier selection, intermediate-input sourcing and the distribution of value added across countries. This dimension deserves greater attention in future nearshoring studies.

Friendshoring introduces a geopolitical constraint into the selection of trading partners. Firms and governments may prioritize countries perceived as politically reliable, institutionally compatible or strategically aligned. Such a strategy can reduce exposure to geopolitical disruption, but it may also limit the number of eligible suppliers and increase production or sourcing costs. Friendshoring should therefore be examined as a constrained trade-partner selection problem in which resilience and political alignment are balanced against comparative advantage, efficiency and welfare.

China Plus One differs from complete relocation because it generally seeks to diversify rather than terminate production relationships with China. Its effect may involve the redirection of final assembly to alternative locations while Chinese firms continue to supply intermediate inputs, machinery or components. Gross bilateral trade statistics may therefore exaggerate the degree of disengagement from China. Measuring this transformation requires value-added trade data, multinational production statistics and international input-output tables capable of tracing the origin of intermediate inputs.

6.3. Logistics, Connectivity and Trade Costs

The bibliometric network indicates that logistics-related concepts are central to production-relocation research. Supply chains, global sourcing, regionalization, risk management, material flow analysis and resilience connect reshoring and nearshoring to the organization of international production. Production relocation therefore cannot be assessed solely through wages, tariffs or manufacturing costs; its feasibility also depends on transport networks and logistics capabilities.

Geographical proximity does not necessarily produce low trade costs. Nearshoring may be undermined by border congestion, insufficient port or rail capacity, fragmented customs procedures and regulatory delays. Lead times and transport costs must therefore be assessed alongside customs-clearance times, border-crossing conditions, transport quotas, multimodality and logistics-service quality.

This issue is particularly important for Türkiye. Proximity to European markets can reduce distance- and time-related trade costs, but the benefit depends on the effectiveness of road, rail, maritime and intermodal networks. Border waiting times, customs procedures, transport-document requirements and road-transport permit quotas may partly offset Türkiye's geographical advantage. Nearshoring and friendshoring potential should therefore be evaluated through comprehensive trade-cost indicators rather than physical distance alone.

The Middle Corridor adds a further logistics dimension. Türkiye's position between Asian production centres and European markets makes it both a potential manufacturing location and a transit economy. The corridor's competitiveness, however, depends on multinational coordination, multimodality, digitalized customs procedures and predictable transit times (OECD, 2023). Infrastructure investment must therefore be accompanied by institutional integration.

6.4. Trade Policy and Institutional Implications

The bibliometric analysis shows that industrial policy has entered the production-relocation literature, although it remains less prominent than reshoring, offshoring and nearshoring. Subsidies, local-content requirements, tax incentives, government procurement and public investment increasingly influence production location. Friendshoring can consequently operate both as a firm-level relocation strategy and as a policy instrument that reshapes the geography of production.

Preferential trade agreements can increase a country's attractiveness for production relocation by lowering tariffs, supporting regulatory cooperation and permitting regional cumulation of origin. They are therefore more than conventional trade-liberalization instruments: their rules can influence production location and supplier selection within regional value chains. Countries outside major preferential arrangements may face disadvantages even when they offer low production costs or geographical proximity.

Friendshoring also creates an asymmetric risk for host countries because investment and sourcing decisions become partly dependent on geopolitical alignment. Even economically competitive countries may be excluded when their strategic position is considered uncertain. Emerging economies must therefore complement cost competitiveness and logistics capacity with coherent foreign, industrial and trade policies.

The results therefore point to a research agenda linking friendshoring to tariffs, export controls, investment-screening regimes, economic sanctions, rules of origin and regional trade agreements. These instruments provide the institutional mechanisms through which geopolitical preferences are translated into observable changes in trade and investment.

6.5. Türkiye's Position in Regional Production Networks

Türkiye does not appear among the leading countries in the bibliometric corpus, despite its manufacturing capacity, geographical proximity to the European Union and integration with European production networks. The country's limited visibility indicates a gap between its potential policy relevance and its representation in indexed academic research. The United States, Italy, the United Kingdom, Sweden, China, Germany and Spain occupy considerably stronger positions in the geographical structure.

Türkiye nevertheless possesses several characteristics relevant to nearshoring and friendshoring. Its Customs Union with the European Union, participation in the Pan-Euro-Mediterranean system of cumulation, diversified manufacturing base and proximity to European markets provide an institutional and production-related foundation for deeper participation in regional value chains. These advantages are particularly relevant to automotive, machinery, textiles, household appliances, chemicals and selected intermediate-goods industries.

However, geographical and institutional proximity should not be interpreted as sufficient conditions for becoming a regional friendshoring hub. Macroeconomic predictability, regulatory stability, customs modernization, green-transition requirements, digital infrastructure and logistics performance also influence long-term location decisions. Türkiye's position will therefore depend on its ability to convert physical proximity into predictable delivery times, regulatory compatibility and lower total trade costs.

Future research should compare Türkiye with competing locations in Central and Eastern Europe, North Africa and Mexico. Such studies could examine sector-specific trade patterns, foreign value-added content, logistics performance, preferential market access and investment flows. Comparative analysis would make it possible to determine whether Türkiye's advantages are sufficient to translate friendshoring and nearshoring discourse into observable changes in production and trade.

VII. Conclusion

This study examined the development, intellectual foundations, conceptual structure and geographical distribution of friendshoring and related production-location research by integrating records from Web of Science and Scopus. The findings show that the literature is rooted primarily in the established concepts of reshoring, offshoring, nearshoring and backshoring, while friendshoring remains a comparatively recent and less developed research stream. Friendshoring should therefore not be treated as an entirely independent field; rather, it represents an emerging extension of the broader literature on international production relocation, supply-chain resilience and geopolitical risk.

The bibliometric evidence also demonstrates that the field has expanded rapidly in response to recent global disruptions. Nearly half of the integrated corpus was published from 2023 onward, indicating a substantial increase in scholarly attention following the COVID-19 pandemic, geopolitical tensions and disruptions to international production networks. Nevertheless, the conceptual structure remains dominated by manufacturing-location and supply-chain management perspectives. Although global value chains, sustainability, resilience, technology and industrial policy occupy visible positions in the keyword network, formal international trade mechanisms—including tariffs, rules of origin, preferential trade agreements, export controls and investment-screening regimes—remain comparatively underrepresented.

This imbalance constitutes an important contribution of the study. Friendshoring is not implemented solely through firms' preferences for politically trusted countries; it is also shaped by trade costs, logistics connectivity, institutional compatibility, market access and the regulatory conditions governing international production. Evaluating friendshoring from an international trade and logistics perspective therefore requires attention to changes in trade flows, foreign value-added content, sourcing patterns, customs procedures and regional production networks. The study consequently extends the predominantly operational interpretation of friendshoring by highlighting the trade-policy and logistics mechanisms through which geopolitical preferences may be translated into production and investment decisions.

The findings further reveal a gap between Türkiye's potential strategic relevance and its visibility in the indexed literature. Türkiye's geographical proximity to European markets, Customs Union with the European Union, manufacturing capabilities and position along the Middle Corridor provide a potentially important foundation for participation in reconfigured regional production networks. However, these characteristics alone do not establish Türkiye as a friendshoring hub. Its future position will also depend on macroeconomic predictability, regulatory stability, innovation capability, digital infrastructure, customs efficiency, green-transition readiness and logistics performance. Accordingly, Türkiye should be evaluated not only as a geographically proximate production location but as part of a wider comparative framework incorporating institutional, operational, geopolitical and trade-related dimensions.

7.1. Limitations and Future Research

This study has several limitations. First, differences in the coverage and metadata structures of Web of Science and Scopus meant that the document-citation, author-keyword and country co-authorship networks were constructed using WoS metadata, whereas the integrated corpus was used for performance indicators. Second, database integration relied on normalized-title matching, which may not have identified all duplicate records. The broad search strategy also retrieved a small number of construction- and engineering-related records because of the technical use of terms such as "shoring" and "reshore". Moreover, no VOSviewer thesaurus file was used, meaning that some lexical variants may appear as separate nodes.

The 2026 publication count is provisional because the searches were conducted on 25 July 2026, and citation counts are dependent on the databases and retrieval date. Finally, bibliometric analysis maps the structure of academic knowledge but does not provide direct evidence of firms' location preferences. Future research should therefore combine bibliometric findings with firm-level surveys, interviews and sectoral trade and investment data. Comparative studies involving Türkiye, Central and Eastern Europe, North Africa and Mexico could further assess whether Türkiye's geographical, institutional and logistics advantages translate into observable changes in production, sourcing and trade flows.

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