Journal of Cultural Economy

ISSN: 1753-0350 (Print) 1753-0369 (Online) Journal homepage: www.tandfonline.com/journals/rjce20

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To cite this article: Christiaan De Beukelaer (11 Mar 2026): Regulating logistics: *compliance capitalism* or *compliance environmentalism*?, Journal of Cultural Economy, DOI: 10.1080/17530350.2026.2620683

To link to this article: https://doi.org/10.1080/17530350.2026.2620683

Published online: 11 Mar 2026.

JOURNAL OF CULTURAL ECONOMY
https://doi.org/10.1080/17530350.2026.2620683

Routledge
Taylor & Francis Group

REVIEW ARTICLE

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Regulating logistics: *compliance capitalism* or *compliance environmentalism*?

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ABSTRACT

Compliance capitalism offers potential solutions to disruptions and challenges in global trade by aiming to internalize social and environmental concerns into the increasingly required checks and balances along the supply chain. However, the explicit connection between compliance and capitalism risks prioritizing capitalist imperatives over planetary boundaries. This article argues that compliance should primarily align with *geophysical constraints* rather than with economic growth. Drawing on earth system science, doughnut economics, and critical perspectives on global trade, the article challenges conventional economic assumptions about limitless growth within finite systems. It explores the tensions between capitalist extraction and earth system stewardship, arguing that current compliance mechanisms often serve to incrementally improve fundamentally exploitative practices rather than transform the underlying environmental and social problems. The article calls for a reversal of priorities, placing compliance with planetary boundaries above the extractive needs of capitalism. This approach, termed 'compliance environmentalism', is presented as a necessary evolution in our understanding of global trade and logistics, which might come at the expense of capitalism itself.

ARTICLE HISTORY
Received 19 October 2025
Accepted 9 January 2026

KEYWORDS
Earth system boundaries; doughnut economics; global supply chains; ecological economics; climate realism; political ecology

Global supply chains have seen turbulent years of late. Between the COVID-19 pandemic, the *Ever Given* blocking the Suez canal, climate change-induced water shortages that left locks at reduced capacity the Panama canal, reduced navigability of the river Rhine, as well as the hidden costs of both 'free shipping' (Alimahomed-Wilson and Reese 2021) and last-mile delivery contractors (Cant 2020), the global movement of physical goods has entered public awareness (Campling and Colás 2021), as Stuart Kirsch observes in his position paper for this special issue. These compounding challenges expose the sheer scale and importance of globalized logistics for the equally globalized economy (De Beukelaer and Steinberg 2025; Quet 2022). Both geopolitically and environmentally, these flows are increasingly called into question as various pressures upset the Western dominance in material and capital flows. But does an increased focus on *compliance* offer a way through the thicket of these disruptions and challenges?

In their introduction to this special issue, Dua and Kirsch ask *what it would take* for compliance capitalism to emerge from the rubble of neoliberal policies for 'free trade'. As they note, this implies an ethnographic approach to the global economy (what does compliance capitalism look like across

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global supply chains?) and raises questions about the emergence of another way of organizing the global economy.

In my own contribution, I ask a slightly different question: *compliance with what* – or *with whom*? I thereby expose the widening gap between compliance with regulations that 'improve' capitalism (which is critical for the survival and prosperity of capitalists) and compliance with the planet's geophysical boundaries (which is critical for the survival and prosperity of humanity).

The global economy is growing. As it increases in size, its metabolism devours more energy and resources at an accelerating speed (Smil 2019; Steffen et al. 2015). There is some level of relative decoupling of global trade and greenhouse gas emissions, but no decoupling at all between resource use and the economy (European Environment Agency 2021; Wiedmann et al. 2020). The material footprint of the economy has increased to over a hundred billion metric tons per annum. Only a small fraction of this material footprint is circular (Circle Economy 2024).

In this context, earth system scientists have attempted to identify what constitutes a 'safe operating space for humanity' (Rockström et al. 2009) by defining and quantifying critical planetary boundaries. By 2023, six of nine boundaries were crossed (Richardson et al. 2023). In 2025, the tally stood at seven out of nine (Planetary Boundaries Science 2025). Their message is clear: capitalist extraction impedes earth system stewardship (Steffen et al. 2018).

My central argument is that we're at a critical juncture concerning humanity's ability to live in prosperity: major changes to global trade have increased reporting and compliance requirements – both in favor and against environmental and social criteria – in recent years. On balance, the resulting patchwork of regulatory and reporting favors capital accumulation above social and environmental impacts (Whyte 2020). In this article, I argue in favor of reversing the order of importance posited in Kirsch's notion of compliance capitalism. He seeks to address social and environmental concerns without inherently challenging the existing capitalist economy. In contrast compliance should in the first place align with the geophysical boundaries of the planetary environment, which then allows for discussion of the kinds of economic activities that are genuinely sustainable within those constraints.

This raises the question of whether a 'good life' (however subjective that might be) is possible for a population of more than eight billion humans within planetary boundaries. This approach requires a heterodox look at the intersection of humans and the environment. Kate Raworth (2017) developed 'doughnut economics' as a model that proposes a good life for all below the 'ecological ceiling' (her term for 'planetary boundaries') and above the 'social foundation' (a set of quantified human needs) (see also Fanning and Raworth 2025). Since she proposed the idea, empirical research has shown that it is feasible for all human beings to live within these constraints (Gupta et al. 2024; Hickel 2019; O'Neill et al. 2018). This would, however, require reversing material flows that today fuel inequality by dispossessing the many to feed the overconsumption of the few (Campling and Colás 2021).

This makes global supply chains a useful lens for viewing change (De Beukelaer 2023). Can logistics deliver a 'good life' for all by critically engaging with the means and the ends of material flows with a very specific goal in mind: rendering the world equitably prosperous? Throughout the remainder of this article, I will argue that it can. Though to do so, compliance with planetary boundaries needs to take primacy over compliance with the logic of capitalism.

Compliance?

Kirsch defines 'compliance capitalism' as 'a series of transformations in which corporations are increasingly compelled to document and report on their impacts on labor and the environment, especially climate change, expanding requirements for the documentation and disclosure of everything from the conditions of work to greenhouse gas emissions'. It thereby seeks to develop a 'third way' between economic and social-environmental concerns, much like Giddens (1998) sought to

find a middle ground between labor and capital in the 1990s. However, when looking at capitalism through the lens of supply chains, the meaning of 'compliance' gets muddled.

First, compliance as a practice under globalized capitalism mostly serves to rectify a lack of trust. Indeed, complying with formal certification requirements externalizes responsibility in a context where no one can personally trace all of the actors and actions across the lifecycle of any given product within a supply chain. Compliance capitalism thus assumes the need for legal and voluntary requirements with a view to encourage reporting on a range of issues. These requirements serve to ensure accountability and reliability between otherwise anonymized and increasingly distant supply chains that make it impossible for any citizen to be an informed consumer or any company to maintain full oversight. The nature of the resulting relationship – based on trust-by-proxy – between producers and consumers is intended to inspire confidence in companies and their brands. While all steps to improve the social and environmental impacts of production are welcome, suggesting this equates to 'compliance' carries an inherent risk if the bar is set too low.

Second, supply chains will therefore only be as resilient as the principles and metrics to be complied with. This is because 'compliance' is an empty signifier that conceals – rather than clarifies – what we're meant to comply *with*. This enables greenwashing – by pretending to comply with genuine standards or actually complying with very weak ones. Though compliance often means little more than that one is in compliant with the requirement to be in compliance. This makes it a self-referential circular exercise that foregoes its stated intent. More fundamentally, this creates a mirage. One can be fully compliant with existing rules, while still exploiting humans and the planetary environment in wholly unsustainable ways.

If we are indeed witnessing the rise of compliance capitalism, we need to understand what or whom that compliance is with. My normative concern is with the long-term prosperity of all humans, creatures, organisms, and the planet. A useful framework to measure this against is 'planetary well-being', defined by its proponents as 'a state in which the integrity of Earth system and ecosystem processes remains unimpaired to a degree that lineages can persist to the future as parts of ecosystems, and organisms (including humans) can realize their typical characteristics and capacities' (Kortetmäki et al. 2021, 4). I see the use of quantifiable 'planetary boundaries' as used in earth systems science (Gupta et al. 2024; Richardson et al. 2023; Rockström et al. 2009) as an imperfect proxy to measure planetary well-being. It may have its critics, because like the 'Anthropocene' it implies a uniformly shared human responsibility (Biermann and Kim 2020; Malm and Hornborg 2014), but it's the most detailed and nuanced framework available to help unsettle policy interventions that are anthropocentric, growth-focused, and methodologically nationalist (Pyykkönen and De Beukelaer 2025).

Capitalism is a self-referential myth in service of existing power relations, whereas earth system science recognizes the interdependence of human beings with the fauna, flora, and minerals of the planet's critical zone and the genuine quantifiable planetary boundaries of Earth. My argument therefore seeks to move from 'capitalist realism' (Fisher 2009) to 'critical climate [and environmental] realism' (Chaudhary 2024). This calls for a reversal of priorities. I therefore propose to shift the normative focus from 'compliance capitalism' to 'compliance environmentalism' in recognition that economic life requires respect for planetary boundaries.

What are globalized supply chains for?

Textbook definitions of supply chains and logistics focus on the movement of goods within the logic of *applied economics* (Cullinane 2011; Stopford 2013), though they overlook its *political economy*. Two such logistics textbooks (Gleissner and Femerling 2013; Morana 2018), for example, do not contain a single mention of the word 'capitalism'. And yet, while at face value the *function* of supply chains might be getting the right product to the right place at the right time, its actual *purpose* is to serve capital accumulation by exploiting the wage and currency differentials across the planet (see Chua et al. 2018; Danyluk 2018; Stenmanns 2019; Tsing 2009).

Classical economics assumes that trade between friendly people and nations is mutually beneficial because of the comparative advantages that specialization and geographic particularities bestow all parties. This is wonderfully naïve. During the nineteenth century Opium Wars, the British Empire defended its right to force their colonized subjects in India to produce opium to sell in China because the British had nothing else the Chinese wanted. They defended that right under the banner of free trade. This is not a unique case. Globalized trade operations require a constant state of war, both to remind of possible deterrence and to showcase military might. That very same ceaseless warfare then requires massive flows of goods that are delivered just in time and have created not only the language, but also the infrastructure of logistics as we know it, which is grounded in military operations before becoming the basis for civil and logistical arrangements (Cowen 2014; Khalili 2020).

Contemporary logistics companies are no longer predominantly under state control or in national ownership, which was long common (Cafruny 1987). Today, these companies are as globalized and shareholder-controlled as are the corporations they serve. Since logistics forms the critical backbone of globalized capitalism, it is simultaneously its strongest asset ('next day delivery' *is* indulgent luxury, but it is an impressive feat – as are manufacturing processes that rely on just-in-time supply chains) and its weakest link (given the fragility of the infrastructure and the power of workers).

Economists often hail the globalization of supply chains rendered possible by containerization as technological innovation (Levinson 2016) that – as if by accident – created the possibility of 'time–space compression' (Harvey 1989). Charmaine Chua et al. (2018) challenge that assumption by positing that this shift in logistics is actually a counter-movement aimed at maintaining the possibility of exploiting material and human resources of newly independent 'postcolonial' states. What we see now is not really a shift away from free trade or from neoliberalism in any genuine sense of the word, because trade was never free or liberal to begin with. It was always rigged and always exploitative by design – in ways that have been harmful towards both people and planet.

Conventional economics maintains that limitless growth is possible within a finite geographical system or geophysical system, thanks to innovation and efficiency gains (Asafu-Adjaye et al. 2015). Well before the rise of environmentalism, the global development doctrine led by President Harry S. Truman in 1949 (see Escobar 1995) effectively promised that the world can have all the unlimited growth that it wants. The argument has long been that we can collectively do more, and everyone can raise their living standards to join mass consumption as spearheaded by the United States (see Rostow 1959). The environmental pressures of an ever-growing economy, facilitated by global supply chains, are increasingly apparent. Capitalism is overshooting earth system boundaries (Richardson et al. 2023) in search of shareholder value. The promise of 'green' growth – which is necessary for the survival of capitalism – is at odds with the carrying capacity of the planet (Hickel and Kallis 2020; O'Neill 2020; Vogel and Hickel 2023). This has turned erstwhile colonial 'zones of exploitation' into 'zones of sacrifice'. Compliance capitalism could *limit* this process, but it does not inherently alter or reverse it. In a context like this, what does compliance capitalism mean for the billions of people living in geographical and social zones of sacrifice? And what does compliance capitalism mean for the integrity of all forms of life on the planet?

Compliance with what? With planetary boundaries!

Economists like to compare the economy to a cake. The cake, they argue, must grow before it can be distributed to more people. The fundamental issue with their thinking is that they mistakenly frame the economy as the metaphor's referent. If there is a cake, it is not the economy, it is the planet. And that cake may or may not be 'ours' to share, lest we want to consume future generations' share. Unlike the economy-as-cake, which economists want to grow, the planet won't get any bigger.

To make sense of the complex relationship between human societies and earth system boundaries, it is critical to move past the fictions of the global and the local. The myth of 'global progress'

serves modernist fantasies that will never materialize while being the false opposite of 'localism' that serves reactionary nationalisms, which have no historical basis. Bruno Latour (2017, 2018) rejects this false opposition and instead invites a coming 'down to Earth' to the terrestrial as normative horizon that rejects both unreachable 'global' and the imagined 'local'. In what Anna Tsing (2005) calls 'friction', this urges us to look at not just *where* we live, but on whom we depend to live; on whom we depend for our *survival*.

Logistics plays a paradoxical role here: while the conceptual framework of planetary boundaries *flatten* the environmental impacts of extractive capitalism by suggesting they are uniformly planetary, globalized supply chains further *deepen* the inequalities of access to resources and fair income from labor. Though this need not be the case; logistics as a 'servant of trade' *can* also function as a global leveler of prosperity, balancing overconsumption and underconsumption to provide decent living standards for all. Hence what is required today is prioritizing *compliance environmentalism* over *compliance capitalism* – even if it comes at the expense of capitalism itself.

Disclosure statement

No potential conflict of interest was reported by the author(s).

Funding

This work was supported by the Swedish Collegium for Advanced Study.

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