2026 PhD Summer School on Operations and Supply Chain Management & the 1st OSCM Early Career Researcher (ECR) Conference

(*Jointly delivered event week — Summer School students are automatically registered for the OSCM ECR Conference*)

Call for Applications

Objectives

The 2026 PhD Summer School on Operations and Supply Chain Management (OSCM) aims to provide a platform for PhD students to learn different research methodologies and their applications in the OSCM context. It will include several sessions delivered by faculty members from the Department of Operations and Supply Chain Management and the Centre for Supply Chain Research at the University of Liverpool Management School. Two external speakers, including Professor Haitao (Tony) Cui from the University of Minnesota (https://carlsonschool.umn.edu/faculty/tony-haitao-cui) and Professor Zhaohui Wu from the Oregon State University (https://business.oregonstate.edu/faculty-and-research/faculty-directory/zhaohui-wu#background), will also visit Liverpool and contribute to this year's Summer School. Professor Cui's session will focus on "Operations Management on Social Media and Platforms" while Professor Wu will share his insights into "Case Research Method". PhD students will have an opportunity to present their research at the Summer School and to seek advice from relevant faculty members and their PhD peers. The Summer School can contribute to formal doctoral training requirements and ECTS-recognised study components and will also enable PhD students to meet and network with each other and to explore future research collaborations.

The Summer School is jointly delivered with the 1st OSCM Early Career Researcher (ECR) Conference on the final day of the Summer School. All registered Summer School students will be automatically registered for the Conference, providing extended opportunities for networking, academic exchange, and engagement with early career researchers and senior scholars in the OSCM community. A dedicated session will be organised during the Conference to invite Summer School students to participate in a presentation competition, further enhancing their research development and visibility.

Dates

The Summer School will run from 8th June 2026 (Monday) to 12th June 2026 (Friday) and is jointly delivered with the 1st OSCM Early Career Researcher (ECR) Conference on 12th June.

Venue

The Summer School will take place at the main campus of the University of Liverpool, Liverpool, UK.

Target Students

The Summer School is open to any PhD students who are interested in learning OSCM-related research methodologies.

Application Procedure

PhD students interested in attending the Summer School need to submit the following documents via (Google Form) by 29th March 2026 (Sunday). A Google account is needed for application submission. Applicants will be notified of their application outcomes by 6th April 2026 (Monday). Successful applicants will receive a payment link for the summer school fee. Registration will be confirmed only upon receipt of payment. Maximum 50 students will be selected to attend the Summer School. Successful applicants will also receive automatic registration for the 1st OSCM Early Career Researcher (ECR) Conference on 12th June 2026.

- A cover letter explaining your motivation to attend the Summer School.
- Your up-to-date CV.
- A support letter from your PhD supervisor.
- An abstract (within 300 words) about your research to be presented at the Summer School.

Registration Fee

The registration fee for attending the Summer School is **£225.00**, which will cover all teaching materials, attendance certificate, coffee, tea, and lunch on each day, as well as a welcome dinner on 9th June 2026 (Tuesday). The registration fee also includes automatic registration for the 1st OSCM Early Career Researcher (ECR) Conference held on 12th June 2026. Please note that the registration fee will **NOT** cover your own travel and accommodation costs. Students who are selected to attend the Summer School will be provided instructions on how to pay the registration fee.

ECTS Credit Recognition

Participants who successfully complete the Summer School will receive an official attendance certificate issued by the University of Liverpool Management School. Based on the workload and learning hours, the Summer School corresponds to approximately **3–4 ECTS credits** under the European Credit Transfer and Accumulation System (ECTS).

Please note that the transfer and formal recognition of ECTS credits are subject to approval by the participant's home institution. We will be happy to provide supporting documentation (programme details, contact hours, and learning outcomes) to facilitate credit transfer applications.

Contact

Please contact Dr Daniel Xing at X.Xing3@liverpool.ac.uk if you have any questions about the Summer School.

Preliminary Programme

There will be 10 sessions in the 5-day Summer School. Students need to attend at least 8 of the 10 sessions in order to receive an attendance certificate. Attendance certificates as well as winner certificates for the research presentation competition will be given on the ECR conference day. To enable more interactions and discussions between students and speakers, all students will be divided into a few small groups, with each group assigned a speaker. Students are expected to attend a small group meeting and discuss their research with the assigned speaker during the Summer School.

Date	Time	Speaker	Content
8 June 2026 (Monday)	8:45-10:45	Professor Andy Lyons and Dr Daniel Xing	**Opening and Programme Introduction**
	10:45-11:00	Coffee break	
	11:00-13:00	Professor Andy Lyons	**Researching Complex Phenomena Using Case Studies** Case studies can provide the means for researchers to explore and analyse knotty, multi-faceted, business and management phenomena. This session concerns the use of case studies as tools to conduct empirical investigations of contemporary Operations Management research problems. In additional to practical guidance for choosing case studies for PhD research and for conducting such studies effectively, recent examples from a range of industry collaborators and research projects will be used to demonstrate the operationalisation of case study research and its strengths and weaknesses as a research methodology.
	13:00-14:00	Lunch	
	14:00-17:00	Professor Tony Cui	**Topic 1: Talking without Speaking: Paid Trolls on Social Media and other international platforms** With the massive growth of social media and other informational platforms that businesses and individuals may use to share their opinions, a society's perspectives of certain contentious issues may be influenced significantly. At the same time, it has been noted that various parties have used paid trolls (i.e., fake comments made by bot accounts) to sway public opinions concerning some hotly debated issues or legal proceedings. This article aims to investigate how public opinions and paid trolls may affect the outcome of legal disputes between opposing parties. Our research indicates that firms involved in lawsuits with social media engagement may purchase paid trolls to influence public opinions, and they do so more significantly when the truth does not match the prior expectation of the public. We also discover that social media users' sophistication may be a pitfall for the involved parties, including the competing firms and the judge who is adjudicating the

			case. Additionally, the court may be either constrained or aided to identify the truth by having a tendency to render decisions that align with prevailing public opinions, depending on the stake of the lawsuit. **Topic 2: How to generate research ideas** In this talk, Prof. Cui will discuss several ways of generating research ideas. The talk is helpful for PhD students to generate research ideas.
9 June 2026 (Tuesday)	8:45-10:45	Professor Jo Meehan	**Designing impactful SCM research** In this session, you will learn about the importance of 'impact' in academic research and be given practical advice of how your research can contribute to changing business practice, government legislation, professional standards, and influence attitudes towards responsible supply chain management. The session will be interactive and centred around developing an impact plan for your own research.
	10:45-11:00	Coffee break	
	11:00-13:00	Professor Zlatko Bodrožić	**Expanding the possibility space of analysis and development in OSCM research** The interaction between innovations in technology and organisational processes has played an important role in operations and supply chain management for decades. More recently, some scholars have gone beyond this two-way interaction and explore the three-way interaction of technology, organisation and public policy to expand the "possibility space" of their research. In this interactive session, you will learn how to apply this new perspective to your own research.
	13:00-14:00	Lunch	
	14:00-17:00	**Campus and Liverpool City Tour** As part of the summer school experience, participants will be invited to join a guided tour of the university campus and key facilities, offering an opportunity to become familiar with the academic environment and resources. This will be complemented by a visit to Liverpool city centre, where participants can explore the city's rich cultural heritage, waterfront, and vibrant urban atmosphere.	
	17:00-19:00	All	**Welcome Dinner** The welcome dinner will be attended by Summer School students, speakers, and also other academic staff from the Department of Operations and Supply Chain Management and the Centre for Supply Chain Research.
10 June 2026 (Wednesday)	8:45-10:45	Professor Hugo Lam	**Using Secondary Data in OSCM Research: The Good, the Bad, and the Ugly** In recent years, secondary data have been increasingly used in operations and supply chain management (OSCM) research, particularly for quantitative analysis. In this session, I will provide an overview of current practices of using secondary data in OSCM research, drawing on examples from recent papers published in top OSCM journals as well as

			my own research over the past ten years. I will also discuss the good (the advantages), the bad (the limitations), and the ugly (the confusions) of using secondary data in OSCM research. This session will also enable participants to share their own experiences of using secondary data and to discuss possible solutions to some encountered limitations and confusions.
	10:45-11:00	Coffee break	
	11:00-13:00	Professor Jason Choi	**The Six-Step Methodology for Analytical Modeling Research in Operations Management** In operations management (OM), through building the analytical model, researchers try to capture the critical elements of the problem under exploration. The analytical model should neither be too complex nor too simple. The analysis should demonstrate a high-level of research rigor and the derived managerial insights should be robust. As a result, to conduct a good OM study using the analytical modeling approach requires the support of a solid methodology. In this session, we examine a six-step methodology for conducting analytical modeling research in OM. We discuss each step in details and share the corresponding tips.
	13:00-14:00	Lunch	
	14:00-17:00	Professor Zhaohui Wu	**Understanding Case research method in supply chain management: Perspective of a practitioner and reviewer** We will discuss the best practices in crafting case-based research manuscript for OSCM journals. More specifically, I will discuss the norms in our discipline in terms of structure of the paper, claims of grounded research methods, and the structure of a research paper among others. I will also discuss the pitfalls new scholars encounter from the perspective of a reviewer.
11 June 2026 (Thursday)	8:45-10:45	Professor Tolga Bektas	**Logistics and Transportation Modelling in Supply Chains** This session will cover various conceptual models of logistics and transportation often employed within supply chains, ranging from vehicle routing, facility and hub location, network design, and last-mile logistics. The session will also describe a range of optimisation problems that these models give rise to, and introduce two main types of analytical methodologies developed to address these problems, namely exact and heuristic solution techniques.
	10:45-11:00	Coffee break	
	11:00-13:00	Professor Dongping Song	**Stochastic Dynamic Programming and Its Applications** Logistics, transport, and supply chain systems are often characterised by dynamic operations and uncertainty. This means we must make sequential decisions over time while anticipating the impact of future unpredictable factors. Such optimal sequential decision making problems can be addressed using a stochastic dynamic programming

			approach. In this session, I will introduce the stochastic dynamic programming technique, covering the fundamental concepts and illustrative applications. We will discuss solution methods and the structural properties of optimal policies. In addition, I will outline its extension to stochastic games involving multiple agents.
	13:00-14:00	Lunch	
	14:00-17:00	**Summer School Social Event** A dedicated social event will be organised by our student ambassadors, featuring a range of fun and interactive activities. This session is designed to help participants get to know one another in an informal setting, build connections across cohorts and institutions, and create enjoyable and lasting memories of the summer school experience.	
12 June 2026 (Friday)	9:00-17:00	**OSCM Early Career Researcher (ECR) Conference** (Details of this event can be found here) A dedicated PhD Presentation Competition session will be organised at the OSCM ECR Conference, enabling Summer School students to present their research and compete for presentation awards. Summer school students are not required to register separately to attend the OSCM ECR conference. However, if you wish to attend the conference only, please follow the above link and complete your registration accordingly.	

Speaker Bio (in alphabetical order of surnames)

Professor Tolga Bektas is Professor of Logistics Management at the University of Liverpool Management School. He has a PhD in Industrial Engineering (2005) from Bilkent University and held academic posts at the University of Montreal and the University of Southampton. His research interests are in the planning and optimisation of operations arising within freight logistics and distribution, including vehicle routing and scheduling, railway timetable optimisation, maintenance planning in sea vessels and last-mile distribution in cities, with an emphasis on reducing environmental externalities from transport.

Professor Zlatko Bodrožić is a Professor of Digital Enterprise at the University of Liverpool Management School. He is interested in the interaction of technologies, organisational paradigms and public policy (see, for example, his research published in '*Administrative Science Quarterly*', 2018; '*Organization Science*', 2022; '*Production and Operations Management*', forthcoming). Zlatko's current research focuses on the evolution of these three spheres in response to grand challenges such as digital transformation or climate change.

Professor Jason Choi is currently Chair in Operations and Supply Chain Management (OSCM), and Director of the Centre for Supply Chain Research at University of Liverpool Management School (ULMS). He has published extensively in leading journals in OSCM. He is currently serving the profession as the Editor-in-Chief of *IEEE Transactions on Engineering Management*, and Senior Editor of *Production and Operations Management*. He has been listed as a highly cited researcher by Clarivate (Web of Science) since 2022.

Professor Haitao (Tony) Cui is the Ecolab-Pierson Grieve Chair in International Marketing, Professor of Marketing, and Deputy Associate Dean for Global DBA, at the Carlson School of Management, University of Minnesota, and an Affiliated Professor at the Industrial Engineering Department of U of Minnesota. Cui is also the Marketing Science Institute Inaugural MSI Scholars, the Chang Jiang Scholars by Ministry of Education of China, and the Chair of the Academic Committee of the Behavioral Operations Research and Management Chapter of Operations Research Society of China. Cui serves as Departmental Editor of Marketing-OM Interface area at Production and Operations Management and serves on the editorial boards of Journal of Operations Management and other academic journals. Professor Cui has been devoted to applying behavioral and experimental economics to business decision making. Cui is among the small cohort of pioneers in this emerging academic area. His research has been published on top tier business journals including JM, JMR, JAMS, JEBO, Management Science, Marketing Science, POM, and SMJ. Cui has been named the Marketing Science Institute Young Scholars in 2011, 3M Non-Tenure Faculty Award, Management Science Meritorious or Distinguished Service Awards from 2009 until 2019 and 2022, Marketing Science Service Award in 2013 and 2014,and was selected as an AMA-Sheth Doctoral Consortium Fellow in 2004. He was named the Marketing Science Institute Young Scholars in 2011 (to scholars whose work suggests they are "potential leaders of the next generation of marketing academics"), the Marketing Science Institute Inaugural MSI Scholars in 2018 (the award recognizes "individuals' excellence in scholarship and top scholars who are setting the research agenda in their field"), selected by Carlson CHEMBA EMBA students as the "Popular Professor of The Year" in 2017, 2018, 2019, 2023 and 2025, "Carlson Teaching Award" in 2020, the "Carlson Outstanding Research Award" in 2017, Carlson DBA Teaching Award in 2023 and 2024, and was awarded for Outstanding Teaching and Dedication to Helping Students Learn by the Center for Educational Innovation, University of Minnesota in 2019, besides other awards and achievements. Dr. Cui received a B.Eng. in Industrial Engineering, a B.Eng. in Fluid Machinery and Fluid Engineering, and an IMBA, all from Tsinghua University. He also received an M.A. in Operations and Information Management and a Ph.D. in Managerial Science & Applied Economics, both from the Wharton School, University of Pennsylvania..

Professor Hugo Lam is Chair in Operations Management and Director of Research (Operations and Supply Chain Management) at the University of Liverpool Management School. He obtained his PhD in Operations Management from The Hong Kong Polytechnic University. Hugo's research focuses on operational implications of emerging technology adoption and sustainable supply chain management, with relevant papers published or forthcoming in *Management Science*, *Journal of Operations Management*, *Production and Operations Management*, and *International Journal of Operations & Production Management*, among others. He is serving the Operations Management community as a Co-Editor-in-Chief of *International Journal of Operations & Production Management* and an Associate Editor of *Journal of Operations Management*.

Professor Andy Lyons is Professor of Operations & Supply Chain Management and Head of the Operations & Supply Chain Management Department at the University of Liverpool Management School. He has significant and varied experiences in research, teaching, leadership and knowledge exchange and has published over sixty journal articles and one book. He has been awarded over £4M of direct research and knowledge exchange funding. He is a member of the School Management Committee and was a former Interim Head of the Marketing Department and Head of the Marketing & Operations Department at the University. His expertise and research interests are broadly in the area operations and supply chain management and design. This includes supply strategy and the design of

supply chain performance measurement systems, the scrutiny of supply chain practices through innovative mapping and modelling techniques, the examination of the effectiveness of lean practices, digital strategy development and analytics to support growth in SMEs, and the examination of sustainable and regenerative supply chain practices. Professor Lyons has supervised over 25 PhD students.

Professor Jo Meehan is a Professor of Responsible Procurement and the Director of the Centre for Sustainable Business at the University of Liverpool Management School. Jo's research centres on modern slavery in supply chains, social value in public procurement, and corporate power. Her work explores the commercial practices that allow social inequalities and environmental harm to persist, and crucially, what might be done to enable systemic change. Her work has won numerous international awards and she has been described in the business press as "one of the UK's most influential procurement academics". She is a regular public speaker on responsible business and has extensively published in world-leading academic journals and in the professional press. Jo's research has been referenced by the World Health Organisation, the United Nations Environment Programme, the UK's National Health System, the UK Government's Crown Commercial Service, and the Chartered Institute of Procurement and Supply, as well as numerous corporate organisations. Jo is an Associate Editor for the *Journal of Purchasing and Supply Management* and champions the journal's 'business-not-as-usual' research.

Professor Dongping Song is a Chair of Supply Chain Management in the University of Liverpool Management School. He obtained his PhD at Newcastle University and previously served as a Professor of International Logistics at Plymouth University Business School. He is a Senior Member of IEEE and a member of CILT. Currently he serves as an Associate Editor for *Transportation Research Part E* and for *International Journal of Shipping and Transport Logistics*. His research interests include applying mathematical modelling, data analytics, artificial intelligence, and simulation-based tools to various supply chain, maritime transport and logistics systems, especially in the presence of uncertainty and risk, with the goal to advance knowledge and assist industries in improving operational efficiency and reducing emissions. He has managed a number of research projects funded by EPSRC, ESRC, Royal Society, British Council, European Commission, and Chinese Research Councils. He has published five monographs in the areas of supply chain, transport, and logistics, including "Optimal Control and Optimization in Stochastic Supply Chain Systems" by Springer in 2013, and "Container Logistics and Maritime Transport" by Routledge in 2021.

Professor Zhaohui Wu is a Professor of Supply Chain Management at Oregon State University. He is also an Honorary Professor at University of Exeter. Currently he serves as Associate Editors of Journal of Operations Management and Journal of Supply Chain Management. He also served as visiting professors at various universities including Aarhus University and China Shanghai Marine University. He is also a receipt of multiple research grants from National Science Foundation (US), US Department of Agriculture (USDA), Agriculture of the Middle and The Leverhulme Trust Visiting Professorship (UK). He is currently teaching and conducting research on supply networks, industry policies, alternative food systems, agricultural cooperatives, informal economy concerning migrant workers and refugees.

Dr Daniel Xing is an Associate Professor in Operations and Supply Chain Management in the University of Liverpool Management School. He obtained his PhD from the same institution, focusing

his research on enhancing the profitability of tank container operators through optimized container network design, efficient decision-making in job fulfillment, and cost-effective empty container repositioning. Before pursuing his studies in England, Daniel accrued nearly four years of experience at various companies, including Toyota and SpecTec (a shipping management consultancy), in China. His academic pursuits and professional background synergize adeptly, enabling him to bridge theoretical research with practical business applications seamlessly. Daniel's expertise lies in maritime logistics, road transport, and supply chain management, with a keen interest in emerging technology applications in supply chain management (e.g. AI and blockchain). His research articles have been published in esteemed business journals such as *Journal of Operations Management*, *European Journal of Operational Research*, *International Journal of Operations and Production Management*, T*ransportation Research Part E: Logistics and Transportation Review*, and *Annals of Operations Research*, among others. Currently he serves as an editorial board member for *Transportation Research Part E* and for *IEEE Transactions on Engineering Management*.