

4th KIEL-CEPR CONFERENCE ON GEOECONOMICS

preliminary program as of September 11, 2025

DATE AND LOCATION

October 30–31, 2025

Sciences Po Department of Economics, Paris

ORGANIZERS

Isabelle Méjean (Sciences Po and CEPR)

Moritz Schularick (Kiel Institute, Sciences Po, and CEPR)

Christoph Trebesch (Kiel Institute, Kiel University, and CEPR)

IN COOPERATION WITH

German Embassy in Paris

Sciences Po Department of Economics

CONFERENCE PARTNERS

CEPR RPN on Geoeconomics

CEPR RPN on International Lending and Sovereign Debt

Institute for European Policymaking at Bocconi University

ReCIPE initiative

CONFERENCE PARTNERS



Università
Bocconi

IEP@BU
Institute for European
Policymaking



CEPR GEOECONOMICS

CEPR INTERNATIONAL
LENDING AND
SOVEREIGN DEBT

THURSDAY OCTOBER 30, 2025

Sciences Po Department of Economics
28 rue des Saints-Pères, 75007 Paris

08:30-09:00

Lobby
Doors open & registration

09:00-09:20

OPENING

Lecture hall Simone Veil

Welcome: Isabelle Méjean, Moritz Schularick, Christoph Trebesch

Opening address: Luis Vassy, President, Sciences Po

09:20-10:40

PARALLEL PAPER SESSION I

Lecture hall Simone Veil

The World Trading System

International Trade in an Uncertain World

Ernest Liu (Princeton)

Benny Kleinman (Stanford)

Stephen Redding (Princeton)

Discussant: **Isabelle Méjean** (Sciences Po and CEPR)

A World Trading System For Whom? Evidence from Global Tariffs

John Sturm Becko (Princeton)

Rodrigo Adao (Chicago Booth)

Arnaud Costinot (MIT and CEPR)

Dave Donaldson (MIT and CEPR)

Discussant : **Feodora Teti** (LMU Munich, ifo Institute, and CEPR)

Classroom H405

Geopolitical Spillovers

Foreign Political Risk and Technological Change

Joel P. Flynn (Yale)

Jakob Moscona (MIT)

Antoine Levy (Berkeley)

Mai Wo (Yale)

Discussant: **Ralph Ossa** (UZH and CEPR)

Hegemonic Competition with Carrots and Sticks

Nicolas Wessler (University of British Columbia)

Timothy Meyer (Kiel Institute and University of Bonn)

Discussant: **Mathias Thoenig** (HEC Lausanne and CEPR)

10:40-11:10

Lobby
Coffee break

11:10-12:00

ACADEMIC KEYNOTE

Lecture hall Simone Veil

Keynote: Kenneth Rogoff (Harvard and CEPR)

12:00-12:10

Short break

12:10-13:30

PARALLEL PAPER SESSION II

Lecture hall Simone Veil

Classroom H405

Decoupling and Geoeconomic Pressure

Sanctions

Geoeconomic Pressure

Antonio Coppola (Stanford and CEPR)

Christopher Clayton (Yale)

Matteo Maggiori (Stanford and CEPR)

Jesse Schreger (Columbia and CEPR)

Discussant: **Hélène Rey** (London Business School and CEPR)

Paper tbc

Beata Javorcik (EBRD, Oxford, and CEPR)

Discussant: **Dzhamilya Nigmatulina** (HEC Lausanne and CEPR)

Playing with blocs: Quantifying decoupling

Nitya Pandalai-Nayar (UT Austin)

Barthélémy Bonadio (NYU-Abu Dhabi)

Zhen Huo (Yale)

Elliot Kang (University of Michigan)

Andrei A. Levchenko (University of Michigan)

Hiroshi Toma (University of Michigan)

Petia Topalova (IMF and CEPR)

Discussant: **Dennis Novy** (Warwick and CEPR)

Bypassing Sanctions: Hide 'N Seek in Tax Havens?

Mikael Tovmasyan (Catholic University Eichstätt-Ingolstadt)

Dominika Langenmayr (Catholic University Eichstätt-Ingolstadt)

Sebastian Vosseler (Catholic University Eichstätt-Ingolstadt)

Discussant: **Anastasiia Arbuzova** (Boston University)

13:30 – 13:40

Transit to Cafeteria Saint-Thomas

13:40 – 14:40

Cafétéria Saint-Thomas, 1 Place Saint-Thomas d'Aquin, 75007 Paris

Lunch break

14:40 – 15:00

Transit to Palais Beauharnais

Palais Beauharnais
Residence of the German Ambassador to France
78 Rue de Lille, 75007 Paris



Ambassade
de la République fédérale d'Allemagne
Paris

WELCOME

15:00 – 15:10 **Opening address:** Stephan Steinlein, German Ambassador to France

15:10 - 16:25 POLICY PANEL

**The economics of defense:
Leveraging Franco-German collaboration for efficient defense spending**

16:25 - 16:40 *Short break*

16:40-17:50 BERNHARD HARMS PRIZE 2025

Laudation: Kenneth Rogoff (Harvard and CEPR)

Laureate: Silvana Tenreyro (LSE and CEPR)

17:50-19:00 RECEPTION

FRIDAY OCTOBER 31, 2025

Sciences Po Department of Economics
28 rue des Saints-Pères, 75007 Paris

Lobby

08:30-09:00

Doors open & registration

09:00-10:20

PARALLEL PAPER SESSION III

Lecture hall Simone Veil

Tariffs and Trade

Optimal Tariffs with Geopolitical Alignment

John Sturm Becko (Princeton)

Gene M. Grossman (Princeton and CEPR)

Elhanan Helpman (Harvard and CEPR)

Discussant: **Alberto Martin** (CREI, UPF, and BSE, and CEPR)

Geopolitics and the World Trading System

Robert Staiger (Dartmouth)

Aaditya Mattoo (World Bank)

Michele Ruta (IMF)

Discussant: **Banu Demir Pakel** (Oxford and CEPR)

Classroom H405

Disintegration – Research and Finance

Building a Wall Around Science: The Effect of U.S.-China Tensions on International Scientific Research

Robert Flynn (Boston University)

Britta Glennon (University of Pennsylvania)

Raviv Murciano-Goroff (Boston University)

Jiusi Xiao (Claremont Graduate University)

Discussant: **Carlo Rasmus Schwarz** (Bocconi and CEPR)

Geopolitics and global interlinking of fast payment systems

Massimo Ferrari Minesso (ECB)

Arnaud Mehl (ECB and CEPR)

Olga Triay Bagur (ECB)

Isabel Vansteenkiste (ECB)

Discussant: **Elena Carletti** (Bocconi and CEPR)

10:20-10:50

Lobby

Coffee break

10:50 – 11:20

EXCELLENCE AWARDS 2025

Lecture hall Simone Veil

Laureates:

Rodrigo Adao (Chicago Booth)

Christopher Clayton (Yale)

Lydia Cox (Wisconsin-Madison)

Jacob Moscona (MIT)

11:20 – 12:10

ACADEMIC KEYNOTE

Lecture hall Simone Veil

Keynote: Pol Antràs (Harvard and CEPR)

12:10 – 12:20

Transit to Cafeteria Saint-Thomas

12:20-13:20

Cafétéria Saint-Thomas, 1 Place Saint-Thomas d'Aquin, 75007 Paris
Lunch break

13:20-13:30

Transit to 28 rue des Saints-Pères

13:30 – 14:50

PARALLEL PAPER SESSION IV

Lecture hall Simone Veil

Classroom H405

Military Spending (ReCIPE Session)

Costs of the Trade War

Revisiting Military Keynesianism: Labor Market and Political Effects of Cold War Procurement

The Long-Term Impact of Steel Tariffs on U.S. Manufacturing

Suresh Naidu (Columbia)

Lydia Cox (University of Wisconsin—Madison)

Ilyana Kuziemko (Princeton)

Discussant: **Thierry Mayer** (Sciences Po and CEPR)

Danny Onorato (Columbia)

Discussant: **Ethan Ilzetki** (LSE and CEPR)

The Military Taylor Rule

Sabotage as Industrial Policy

Jonathan Federle (Kiel Institute)

Martin Rotemberg (New York University)

Mathias Thoenig (HEC Lausanne and CEPR)

Jin Liu (University of Pennsylvania)

Christoph Trebesch (Kiel Institute, Kiel University, and CEPR)

Sharon Traiberman (New York University)

Discussant: **tbc**

Discussant: **Claudia Gentile** (University of Geneva)

14:50-15:00

Short break

15:00-16:15

POLICY PANEL

Lecture hall Simone Veil

Global trade at a Crossroads: Economic and Geopolitical Consequences

16:15-16:30

CLOSING

Lecture hall Simone Veil

Isabelle Méjean, Moritz Schularick, Christoph Trebesch

CONFERENCE PARTNERS**Università
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Policymaking