

Conference on Geoeconomics: New developments and historical perspectives

Castle Tübingen, 17th – 18th April 2026

Organized by Jörg Baten (U Tübingen & CEPR), Anna Gumpert (U Tübingen & CEPR), Ralph Lütticke (U Tübingen & CEPR), Gernot Müller (U Tübingen & CEPR), and Moritz Schularick (IfW Kiel, Science Po & CEPR)

Friday, April 17th

13:00 – 13:45 Arrival and small lunch

13:45 Opening remarks: Anna Gumpert and Jörg Baten

13:50-15:10 *Session 1 The Long-run*

The Political Economy of Imperial Trade Policies

by **Giovanni Facchini** (Nottingham and CEPR)

Discussion: Cathrin Mohr (Kiel Institute)

The Fragility of the Global Trading System

by **Ferdinand Rauch** (Oxford/St.Gallen and CEPR)

Discussion: Anna Ignatenko (NHH)

15:10-15:30 Coffee break

15:30-16:50 *Session 2 Trade and Subsidy Policy*

Export Subsidies as Industrial Policy: The Case of the 19th Century Sugar Industry

by **Lidia Smitkova** (Oxford)

Discussion: Dorothee Hillrichs (ifo Institute)

Trade Policy Sentiment and Global Corporate Investment

by **Matteo Iacoviello** (FED)

Discussion: Jonathan Federle (Kiel Institute)

16:50-17:10 Coffee break

17:10-18:30 *Session 3 Geopolitics and Emerging Economies*

You Only Weave Twice: Espionage and Industrialization in 1700-1800 France

by **Bruno Caprettini** (St. Gallen and CEPR)

Discussion: Mathias Hoffmann (U Zurich)

Geopolitics and Export Miracles: Firm-level Evidence from U.S. War Procurement in Korea by **Nathan Lane** (Oxford)

Discussion: Manuel García-Santana (UPF and CEPR)

19:00 Conference dinner Restaurant Liquid Kelter.

Dinner lecture by **Moritz Schularick** (Kiel Institute, Science Po & CEPR)



Saturday, April 18th

9:00-10:00 **Keynote lecture**
by **Christoph Trebesch** (Kiel Institute and CEPR)

10:00-11:20 *Session 4 Global Banking and Finance*

Chinese Banks and Their EMDE Borrowers: Have Their Relationships Changed in Times of Geoeconomic Fragmentation?

by **Cathérine Casanova** (SNB)

Discussion: Xiang Li (Halle)

Global Banking and Geopolitics Through Time

by **Arnaud Mehl** (ECB and CEPR)

Discussion: Julia Fisher (Luzern)

11:20-11:40 Coffee break

11:40-13:00 *Session 5 International Relations*

Unequal Decoupling

by **Sergio de Ferra** (Oxford and CEPR)

Discussion: Axelle Ferriere (Science Po and CEPR)

Hegemonic Competition with Carrots and Sticks

by **Tim Meyer** (U Bonn & Kiel Institute)

Discussion: Jan Bakker (Bocconi and CEPR)

Time allocation

Presentation: 25 min; discussion: 10 min; general discussion: 5 min