

3rd Kiel-Göttingen-CEPR Conference

China in the Global Economy

Date and Location

30 June – 1 July 2026

Berlin Representation of the State Government Schleswig-Holstein

[In den Ministergärten 8, 10117 Berlin](#)

Organizers

Andreas Fuchs, Holger Görg, Lei Li, Wan-Hsin Liu, Moritz Schularick, Christoph Trebesch and Xiaohua Yu

Preliminary Program as of May 18, 2026

Tuesday, 30 June 2026

09:00 Registration and Coffee

09:30 **Opening**

Andreas Fuchs and **Christoph Trebesch**

09:45 **Keynote Speech**

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

Where is China Heading?

Chang-Tai Hsieh (University of Chicago and CEPR)

10:45 Coffee Break

11:00 **Global China Conversation #50**

China Shock 2.0: How Can the German Automotive Industry Respond?

Manuel Kallweit (Head of Economic Intelligence, German Association of Automotive Industry (VDA))

Karoline Rogge (Professor of Sustainability Innovation and Policy, University of Sussex Business School)

Sander Tordo (Chief Economist, Center for European Reform and CEPR)

Moderated by **Julia Fiedler** (Table.Briefings)

Organized in partnership with KOF Zurich, PRIF and Table.Briefings

12:00 Lunch

13:00 **Research Session 1**

1 A: Trade War and Impact

Chair: Wan-Hsin Liu, Kiel Institute

The U.S.-China Trade War and the Geography of Global Production

Lei Li (University of Göttingen)

Co-authors: Harald Fadinger (University of Vienna and CEPR), Jan Schymik (University of Mannheim), Sophia Praetorius (University of Geneva)

Discussant: **Holger Görg** (Kiel University and Kiel Institute)

1 B: Trade War and Environment

Chair: Alina Mulyukova, University of Göttingen & Kiel Institute

From Tariffs to Toxins: The U.S.-China Trade War and Drinking Water Quality in Brazil

Tarah Ramthun (University of Göttingen)

Co-author: Josefin Sünemann (University of Göttingen)

Discussant: **Hendrik Mahlkow** (Kiel University, Kiel Institute and Austrian Institute of Economic Research)

The Remains of the Trade: The U.S.–China Trade War and Its Aftermath

Andrea Presbitero (International Monetary Fund and CEPR)
Co-author: Pol Antràs (Harvard University and CEPR)

Discussant: **Julian Hinz** (Bielefeld University, Kiel Institute and CEPR)

“Polluted” Export Restrictions: The Unintended Consequences of China’s Rare Earth Quota Policies

Yang Jiao (Singapore Management University)
Co-authors: Tuo Chen (Tsinghua University), Yonghan Zhao (Fudan University)

Discussant: **Johannes Binder** (Kiel Institute)

Market Contraction and Innovation Divergence: The Impact of the US–China Trade War on Chinese Innovation

Yueyuan Ma (University of California, Santa Barbara)
Co-authors: Xiao Ma (Peking University), Hanyi Tao (ShanghaiTech University), Yiran Zhang (Fudan University)

Discussant: **Philipp Boeing** (Goethe University Frankfurt and ZEW Mannheim)

Do Pollution Halos Survive Takeover? MNE Acquisitions, Divestments, and Water Pollution in China

Aoife Hanley (Kiel University and Kiel Institute)
Co-authors: Limin Du (Zhejiang University), Lars Hecker (Kiel Institute), Holger Görg (Kiel University and Kiel Institute)

Discussant: **Kampui Tsang** (KU Leuven and UC Louvain)

14:30 Coffee Break

15:00 Research Session 2 2A (Leibniz Network Session): Industrial Policy and Consequences

Chair: Pascal Abb, Peace Research Institute Frankfurt

The Misuse of China’s R&D Subsidies: Noncompliance and Its Impact on Policy Effectiveness

Philipp Boeing (Goethe University Frankfurt and ZEW Mannheim)

2B: Institutions and Development

Chair: Andreas Fuchs, University of Göttingen and Kiel Institute

Bottom-Up Institutional Change and Growth in China

Bingjing Li (Hong Kong University)
Co-authors: Heng Chen (Hong Kong University), Xiaodong Zhu (Hong Kong University)

Co-author: Bettina Peters (ZEW Mannheim and University of Luxembourg)

Discussant: **Tianyu Fan** (Yale University)

Discussant: **Chenzi Xu** (University of California, Berkeley and CEPR)

China Shock 2.0: The Impact of Increased Competition in Third Markets

Julian Hinz (Bielefeld University, Kiel Institute and CEPR)

Co-authors: Sonali Chowdhry (DIW Berlin and Kiel Institute), Katharina Erhardt (Heinrich Heine University Düsseldorf, Kiel Institute and CEPR)

Discussant: **Lei Li** (University of Göttingen)

A Few Bad Apples: Academic Dishonesty, Political Selection, and Institutional Performance in China

Shaoda Wang (University of Chicago)

Co-authors: Zhuang Liu (Hong Kong University), Wenwei Peng (Harvard University)

Discussant: **Soo Yeon Kim** (University of British Columbia)

International Spillovers of China's High-Tech Industrial Policies: Evidence from Germany

Yuxuan Wu (University of British Columbia)

Discussant: **Katharina Erhardt** (Heinrich Heine University Düsseldorf, Kiel Institute and CEPR)

Land Rights Insecurity and the Persistent Misallocation of Talent

Yun Xiao (University of Gothenburg and CEPR)

Co-authors: Zichen Deng (University of Amsterdam), Yunyi Jin (Lund University)

Discussant: **Felix Turbanisch** (University of Göttingen)

16:30 Coffee Break

17:00 **Kiel-MERICS Policy Panel**

China Shock 2.0: How Can Europe Shape Its Strategic Response to Goeconomic Disruption?

Jens Eskelund (President, European Chamber of Commerce in China)

Katharina Erhardt (Professor, Heinrich Heine University Düsseldorf; Research Director & Head of Industrial Policy Lab, Kiel Institute and CEPR)

Mikko Huotari (Director, Mercator Institute for China Studies)

Ditte Juul-Joergensen (*Director-General, Director-General for Energy, European Commission*), *invited*

Moderated by **Finn Mayer-Kuckuk** (Head of Team Geoeconomics, Süddeutsche Zeitung)

Organized in partnership with the Mercator Institute for China Studies

18:15 End of Day 1

Wednesday, 1 July 2026

08:45 Registration and Coffee

09:15 **Keynote Speech**

Chair: Holger Görg, Kiel University and Kiel Institute

China's Unbound Prometheus: Growth and Structural Transformation

Fabrizio Zilibotti (Yale University and CEPR)

10:15 Coffee Break

10:45 **Research Session 3**

3A: Global Supply Chain Disruptions

Chair: Lei Li, University of
Göttingen

**Tracing Sanctions through the
Value Chain: Evidence from the US
Cotton Ban**

Johannes Van Biesebroeck (KU
Leuven and CEPR)

Co-authors: Jean-Francois
Maystadt (UC Louvain, FNRS
Belgium, Lancaster University),
Kampui Tsang (KU Leuven and
UC Louvain)

Discussant: **Yueyuan Ma** (University
of California, Santa Barbara)

**Mild Deglobalization: Foreign
Investment Screening and Cross-
Border Investment**

Feicheng Wang (University of
Groningen)

Co-author: Vera Z. Eichenauer
(ETH Zurich)

Discussant: **Jürgen Matthes**
(German Economic Institute, IW)

3B: Energy, Food and Transition

Chair: Holger Görg, Kiel University
and Kiel Institute

**Mining the Energy Transition:
Chinese Critical Mineral Investment
and Protest in Sub-Saharan Africa**

Kampui Tsang (KU Leuven and UC
Louvain)

Discussant: **Xiaohua Yu** (University of
Göttingen)

**The Rise of Viet Nam's Solar Panel
Industry: Inputs, FDI, and Spillovers**

Pierre-Louis Vezina (King's College
London and Université Paris 1
Panthéon Sorbonne)

Co-authors: Meng Yu Ngov (King's
College London), Trang Thu Tran
(International Finance Corporation),
Gaurav Nayyar (World Bank)

Discussant: **Yuxuan Wu** (University of
British Columbia)

Quantitative Trade with Ships

Hendrik Mahlkow (Kiel University, Kiel Institute and Austrian Institute of Economic Research)
Co-authors: Sonali Chowdhry (DIW Berlin and Kiel Institute), Inga Heiland (NTNU Trondheim and CEPR)

Discussant: **Jonas Casper** (LMU Munich)

Trade Competition and the “Great Migration”: The Impact of Soybean Import Shock in China

Fa Qin Lin (China Agricultural University)

Discussant: **Rainer Thiele** (Kiel Institute)

12:15 Lunch

13:00 Research Session 4

4A: Geopolitics and Economic Outcomes

Chair: Christoph Trebesch, Kiel University, Kiel Institute and CEPR

The Geopolitical Determinants of Economic Growth, 1960 – 2024

Tianyu Fan (Yale University)

Discussant: **Andrea Presbitero** (International Monetary Fund and CEPR)

4B: Firms and Productivity

Chair: Sonali Chowdhry, DIW Berlin and Kiel Institute

Unproductive Exporters

Jonas Casper (LMU Munich)

Discussant: **Feicheng Wang** (University of Groningen)

Geopolitical Blocs in Trade War

Jiandong Ju (Tsinghua University and CEPR)

Co-authors: Hanwei Huang (City University of Hong Kong), Qingqing Niu (Tsinghua University), Zi Wang (Hong Kong Baptist University)

Discussant: **Bingjing Li** (Hong Kong University)

Export Control and Import Diversion: Chinese Firms’ Responses to the U.S. Entity List

Wei Tian (Peking University)

Co-authors: Kailin Gao (University of International Business and Economics), Xinhong Wu (Peking University)

Discussant: **Johannes Van Biesebroeck** (KU Leuven and CEPR)

The Geopolitics of Industrial Policy: Evidence from Export Credits

Chenzi Xu (University of California, Berkeley and CEPR)

Money or Monitoring: Evidence on Improving Worker Effort

Sai Luo (Shanghai University of Finance and Economics)

Co-authors: Karsten Müller (National University of Singapore and CEPR), Adrien Matray (Federal Reserve Bank of Atlanta and CEPR), Zekai Shen (Bocconi University)

Discussant: **Rolf J. Langhammer** (Kiel Institute)

Co-authors: Jing Cai (University of Maryland), Shing-Yi Wang (University of Pennsylvania)

Discussant: **Faqin Lin** (China Agricultural University)

14:30 Coffee Break

15:00 **Research Session 5**

5A: Finance and Adjustment

Chair: Paulina Alibhai, Kiel Institute

The Other China Shock: Chinese Finance and Bond Markets

Layna Mosley (Princeton University)
Co-authors: Avi Ahuja (New York University), B. Peter Rosendorff (New York University)

Discussant: **Jiandong Ju** (Tsinghua University and CEPR)

The Politics of Procurement at the AIIB

Soo Yeon Kim (University of British Columbia)
Co-author: Jesslene Lee (University of Toronto)

Discussant: **Christoph Trebesch** (Kiel University, Kiel Institute and CEPR)

Financing Urbanization in China
Jian Zou (Cornell University)

5B: Political Influence

Chair: Cathrin Mohr, University of Hamburg and Kiel Institute

Public Displays of Alignment

Zi Yang Kang (University of Toronto)
Co-authors: Joris Mueller (National University of Singapore), Jaya Wen (Harvard University), Cheryl Wu (Yale University)

Discussant: **Shaoda Wang** (University of Chicago)

Shifting Influence? China and the 2025 U.S. Aid Retrenchment

Andreas Fuchs (University of Göttingen and Kiel Institute)
Co-authors: Valentin Lang (University of Mannheim), Andrea Presbitero (International Monetary Fund and CEPR), Johannes Rosenbusch (International Monetary Fund)

Discussant: **Pierre-Louis Vezina** (King's College London and Université Paris 1 Panthéon Sorbonne)

The Role of Chinese Panda Ambassadors in International Trade
Mattia Longhi (University of Milano-Bicocca)

Discussant: **Yun Xiao** (University of
Gothenburg and CEPR)

Co-author: Caterina Morelli
(University of Milano-Bicocca)

Discussant: **Aoife Hanley** (Kiel
University and Kiel Institute)

16:30 **Closing Remarks**
Wan-Hsin Liu (Kiel Institute)

16:45 End of Conference

IMPORTANT NOTES:

- Plenary sessions and research sessions A will take place in the room “Großer Saal.”
- Research sessions B will take place the room “Fehmarn.”
- 30 minutes are devoted to each paper in a research session. We aim for short initial presentations of 15 minutes. Discussants should use 3-5 minutes to open the discussion (no slides). The remaining time is for Q&A. We will try to be strict on timekeeping.
- Both the Global China Conversation and the Kiel-MERICS Policy Panel will take place in a hybrid format, with online participation available via Zoom.
- During the event, we take photos and videos for our public relations work online and in print media, including social media channels, and in individual cases pass them on to third parties for reporting purposes. If you do not wish to be photographed, please inform one of our local employees or send an email to events@kielinstitut.de.

Financial Support

We are grateful for the financial support by the Fritz Thyssen Stiftung in the framework of the project “Global Producers in China: Empirical Evidence on FDI, Product Mix, and Emissions” and the VolkswagenStiftung in the framework of the Momentum project “Tapping innovative data sources to analyze the impact of authoritarian states on global development.”

