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CONFERENCE REPORT

2025



CEIAS
Central European Institute
of Asian Studies



SFPA
Slovak Foreign Policy Association

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*This document presents the key takeaways
from the panel discussions as understood
by the conference co-organizers.*



CEEasia Forum 2025: A snapshot

17



**countries
represented
at the event**

2 **conference
days**

8 **panel
discussions**

32



speakers

120

**conference
participants**

Introduction:

Back to the future: Reinventing Europe-Asia cooperation in a shifting global order

Back to the future: Reinventing Europe-Asia cooperation in a shifting global order

Abridged version of opening remarks delivered at the conference.

Over the past several months, the world has indeed experienced fast-paced changes unseen in decades. The rules-based international order is embattled from many sides, and old axioms and previously thought ironclad partnerships are challenged on a regular basis.

As Donald Trump's second administration reached its 100-day mark, US foreign policy has shifted towards an approach based on combinations of transactionalism and review of old partnerships - which are in stark contrast to decades of internationalist policy centered around Trans-Atlantic alliance.

Against this backdrop, and just a few hundred kilometers from here, Russian brutal and illegal war of aggression against Ukraine continues unabated. While the conflict may appear as a regional affair at first look, it is actually key evidence proving the intertwined nature of the Euro-Atlantic and Indo-Pacific security.

China's vast support to Russia, as well as cooperation with Iran and North Korea, are key factors enabling the continued killing of Ukrainians by Vladimir Putin's Russia. Should Ukraine loose, future of the entire European continent will be at peril.

European Union's own security is also largely dependent on cooperation with like-minded partners from the Indo-Pacific region. Be it supply of tanks from South Korea, or military-grade semiconductors from Taiwan, EU's plans for rapid re-armament are dependent on relations with Asian partners, and maintenance of robust and resilient supply chains spanning half a globe.

Supply chains, which are under threat by potential flaring ups in maritime conflicts in the Taiwan Strait, or in the South China Sea where China has only last week moved to occupy and assert sovereignty over Sandy Cay bank in the Spratly Islands in an attempt to claim the South China Sea in its entirety, despite the purported historic claim being dismissed by the Permanent Court of Arbitration due to having no grounds in international law.

Nevertheless, here in Central Europe, concerns about China look differently. At the moment, the regions appears to be torn between continued need for de-risking European economies and reducing their exposures to China, and desires for more economic cooperation.

This is especially evident in the automotive industry, which has long been a backbone of Central Europe's economy. The sector seems to be thoroughly caught between a rock and a hard place – Facing unfair competition from Chinese EV producers, as well as pressure of US tariffs. Navigating these pressures is becoming an existential issue for the region.

Concerns about China's presence in Europe go far beyond economic competition. With its global ambitions, it has also entered the race for winning the hearts and minds of Europeans. To achieve this goal China uses a mixed toolkit, relying on both legitimate exercise of soft power, but also on spreading of propaganda and disinformation, and other types of FIMI operations.

As we see the global order and Europe's own security and prosperity going through these rapid changes, understanding their impact on various regions is crucial. EU is moving to adapt to the global transformation. In the words of President Ursula von der Leyen at the Davos conference in January: *"Our values do not change. But to defend these values in a changing world, we must change the way we act. We must look for new opportunities wherever they arise. This is the moment to engage beyond blocs and taboos. And Europe is ready for change."*

A more pragmatic Europe looking to engage with a variety of partners across the Indo-Pacific region is going to be increasingly on the agenda, and we are here to brainstorm what a best course of action can look like.

Long term sustainability of the relationships with partners like Japan, Taiwan, South Korea, but also India and ASEAN states cannot be based on merely declaratory desires to engage. It is more so a matter of identifying overlapping interests and exploring synergies in specific sectoral agendas. This conference allows us to discuss how to turn these ideas into reality.

Panel 1:

Global security changes: Europe and Asia

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Russia's full-scale war in Ukraine and a revived "America-first" trade posture have shaken the foundations of the post-1945 system built on international law, open markets and Western security guarantees. European security is under direct military pressure, while fresh US tariffs and selective aid suspensions signal a retreat from multilateralism. The result is growing strategic unpredictability and a visible shift from rules to raw power as the organising principle of global affairs. For Europe this is a strategic jolt: reliance on American leadership can no longer be assumed, compelling the EU to accelerate defence integration, secure critical technologies and rebuild industrial depth.

Power, not rules, now drives global affairs

To avoid over-dependence on any single great power, European and Indo-Pacific economies are moving to re-wire production networks through "minilateral" formats—trilaterals and quads that link EU members with India, Japan, South Korea and ASEAN. Priorities extend beyond tariff reductions to include joint R&D in digital standards, climate technology, and critical-mineral sourcing. Universities, think-tanks and start-ups are recognised as key nodes in this new connectivity, providing talent pipelines and shared innovation spaces. Engagement with China remains necessary but must be selective and transparent: cooperation where interests align, resistance where strategic assets—such as European port terminals—could become levers of political influence.

European and Indo-Pacific supply chains must be urgently re-engineered

The most likely escalation zones are the Taiwan Strait, South China Sea, and the high Himalayas. Any crisis around Taiwan would reverberate through semiconductor supply chains and global shipping lanes, directly impacting European economic prosperity. While the 2016 arbitration on the South China Sea clarified legal rights, its non-enforcement underscores the need for sustained diplomatic and maritime presence. In parallel, accelerating glacier melt and large-scale infrastructure projects on the Tibetan plateau threaten both regional stability and water security for billions, making climate-security cooperation an emerging priority. NATO's evolving partnerships with Indo-Pacific democracies, as well as EU's presence in the region should therefore integrate conventional deterrence with environmental surveillance, disaster-response planning and resilient infrastructure finance.

Hotspots from Taiwan, South China Sea, to the Himalayas demand joint deterrence

Panel 2:

How we see China: Narratives and perceptions in Central Europe

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CEIAS's longstanding research on perceptions of China and Chinese FIMI, drawing on surveys in 54 countries, indicates that China is not winning the global 'hearts-and-minds' race against the US and EU. China has secured clear public sympathy only in a few states (Pakistan, Russia, Serbia), while many others remain split between it and the West. In developed countries, political issues shape views most; in developing nations, perceptions of China's quality of life dominate. In China's immediate neighborhood, opinion hinges chiefly on its foreign policy. Despite expanded soft-power efforts, domestic factors usually determine how China is perceived.

Central Europe overall views China negatively, mirroring wider European sentiment, though national nuances persist: Czechs are most skeptical, whereas Slovakia hosts a sizable positive bloc. Party politics deepen splits—Hungarian and Slovak governing-party voters regard Beijing far more favorably than opposition supporters, while Czech attitudes remain sour across the board, albeit with differences between government and opposition voters. Such domestic divides contrast with Western Europe, where opinion is more unified. Although shifts in US policy may dent America's image in Europe, Central Europeans take a nuanced stance in the US-China rivalry. The idea of working with China to lessen EU dependence on Washington enjoys some support across the four countries, yet only a tiny minority favors a Beijing-dominated global order.

Managing its image remains a cornerstone of Beijing's foreign policy. However, China largely fails to penetrate Central Europe's media and social-media ecosystems, instead recycling generic positive content and party lines that ignore local sensitivities. The region does not appear to be a priority for targeted soft-power campaigns; narratives used worldwide are simply repurposed. Traction emerges chiefly when Central European politicians, fringe outlets, and influencers adapt Chinese talking points to local agendas. Consequently, Beijing's influence stems less from sophisticated covert operations than from providing ready-made narratives that home-grown actors amplify amid existing polarisation.

China is not winning the global competition for 'hearts and minds', with some exceptions

Negative views of China prevail across V4, but stark differences exist between different political camps

China struggles to penetrate local discourse directly, relying instead on local actors amplifying its narratives

Panel 3:

East Asian investments and the future of the V4 automotive industry

East Asian investments and the future of the V4 automotive industry

The panel discussion brought focus to the electric transition underway in the V4 automotive industry and the important role played by Chinese, South Korean, and Japanese investments in the process. The tracking of the investments undertaken by CEIAS and its partners shows billions of euros invested by East Asian companies across battery and electric vehicle supply chains in the four countries. Whereas Chinese companies are setting up new manufacturing plants for electric vehicles, partly to circumvent recently imposed EU countervailing duties, South Korean and Japanese companies are investing in refurbishing existing production. Poland and Hungary are becoming key European battery hubs, with notable South Korean and Chinese involvement. Beyond the issue of European competitiveness, geopolitical and security considerations, mainly surrounding China, aggravate the current challenges.

Economic factors are key in attracting investments in the sector in the V4, as the region offers a mix of skilled workforce, an existing network of suppliers, good transportation links, access to the EU market, and lavish investment support by national governments hungry for investment to boost employment. Political considerations generally play a secondary role. However, Hungary, which has been one of the closest partners for Beijing in the EU, appears to be an exception, attracting Chinese investment that is not easily explained by the limited resources and endowments of the country. Meanwhile, in Czechia, passive government policy, permitting issues and local pushback limit larger projects in the sector.

Active policymaking is needed on the side of the V4 governments to avoid turning the region into a low-skill assembly hub in the battery and EV supply chains. Speakers urged the need to make future subsidies conditional on R&D cooperation, university ties, and local supplier quotas, and avoid a subsidy race to the bottom that lets investors pit one state against another. Joint ventures and technology transfer requirements can be used to “reverse engineer” China’s own playbook, once employed to reap benefits from European investment in China. Workforce reskilling, expanded STEM programs and streamlined migration channels are equally urgent as domestic labor pools dry up. Finally, trade policy matters and the four countries need to be more involved in the decision-making in Brussels.

China, South Korea, and Japan are investing heavily in EV and battery production in the V4

Economic factors drive investment, with Hungary's China links as an exception

V4 governments must strategically guide the transition to avoid becoming low-skill assembly hubs

Panel 4:

EU policy towards China in the new political cycle

EU policy towards China in the new political cycle

The EU-China relations are undergoing another phase of adjustment in response to the unprecedented policy shifts by the US under the new Trump administration. Although some expect that the EU and China will get closer, there are several disagreements between the two sides that are likely to prevent a significant improvement of relations on a strategic level. As a matter of fact, Brussels' softer tone toward Beijing is largely a tactical hedge—an attempt to dampen Trump-era tariff risks, coax concessions on Chinese over-capacity, and retain leverage in trade-defence proceedings. Meanwhile, the EU's de-risking agenda is moving on as member states discuss a tougher export-control toolbox, new limits on outward investments and further defensive trade measures against Beijing.

Chinese goodwill gestures—lifting sanctions on MEPs, proposing company-level EV price floors, dispatching high-level envoys to Paris, Berlin, and Madrid—have not shifted fundamentals. State-subsidised dumping, alignment with Russia's war economy, persistent cyber-intrusions, and punitive trade tactics keep the relationship firmly in the “systemic rival” lane, despite talk of “smart” re-engagement. A rebooted Comprehensive Agreement on Investments, frozen since 2021, appears remote; any fresh pact would demand strict clauses on over-capacity, safeguards on tech transfer, and reciprocal R&D—difficult amid collapsed trust and US-China tariff escalation. Secondary US tariffs could soon force the EU to curb Chinese imports, which might be looking for a new entry point as the US market closes.

At the same time, China policy remains contested across Europe. Beijing's diplomatic approach to the EU reflects China's preferences, with most attention being paid to the large member states (Germany and France) and the “spoilers” (especially Hungary). Leadership churn in Paris, Berlin, and Warsaw, plus diverging industrial interests, leaves Brussels without a stable core to anchor a cohesive China strategy, enabling Beijing to play capitals against one another.

Deeper issues in EU-China relations will prevent a strategic rapprochement

China's overcapacity and support of Russia will continue to present major challenges

A cohesive EU China policy remains a distant goal

Panel 5:

NATO and the Indo-Pacific

NATO and the Indo-Pacific

Moscow's ground preparations near the Baltic and Nordic borders have pushed frontline allies back to defense spending of 4–6 percent of GDP and revived Cold-War staples such as trenches, bunkers, and minefields. Warsaw, Helsinki, and Tallinn assume that parts of the 100,000-strong U.S. forward presence will depart under a second Trump term, so they are working toward a land defense that can hold until reinforcements arrive—if they arrive at all. Strategists now game out a two-front crisis in which China blockades Taiwan while Russia presses into the Baltic corridor, forcing NATO to split ships, satellites, and stocks. Because Chinese satellites, cyber assets, and dual-use firms already relay intelligence to Moscow, Europe's ports, rail hubs, and undersea cables have become secondary targets, tightening the Russia-China security braid.

Seoul, Tokyo, Canberra, and Wellington view formal NATO links, shared intelligence, and rotational exercise slots as extensions of the U.S. alliance network. South Korea, with a scaled industrial base, is supplying Poland, Norway, and Finland, turning contracts into political opportunities. Japan presses hardest for a permanent NATO contact office, arguing that counter-blockade drills in the Red Sea, Arctic, and Malacca choke point would raise China's costs and expose North Korean logistics to Russia. ASEAN remains cautious: Manila welcomes joint patrols, whereas Jakarta, Kuala Lumpur, and Bangkok hedge to protect Chinese trade. Consensus therefore grows through flexible formats—Track-2 dialogues, cyber workshops, and ad-hoc patrol invites—rather than treaty-style pledges.

Eastern allies want weapons systems delivered within three years, not the five-to-seven-year cycles common to EU schemes. Hence Poland's multibillion-euro orders for Korean K2 tanks, K9 howitzers, interim fighters, and turnkey ammo lines. Brussels' new "Rearm Europe" fund, steering subsidies to EU firms, risks colliding with those deadlines and undercutting the Secretary General's "any qualified source" message. Meanwhile, governments still dodge sanctions on Chinese enablers of Russia's war economy and offer Manila, Taipei, and Hanoi little beyond statements and token port calls. Closing this credibility gap demands mixed consortia—European, Korean, American, and Japanese—to surge production, plus a clear decision to treat Chinese aid to Moscow as a direct strategic threat, not a distant sideshow.

Russia-China alignment forces NATO into Cold-War-scale planning

Indo-Pacific partners seek NATO ties to deter dual contingencies

Europe must balance rearmament with industrial and diplomatic reality

Panel 6:

Civil society and media in Southeast Asia and Central Europe: Shared values, common challenges

Civil society and media in Southeast Asia and Central Europe: Shared values, common challenges

Southeast Asia's public sphere has narrowed to its tightest point in decades, mirroring backsliding in parts of Central Europe. Everywhere the methods rhyme: draconian national-security laws, spyware, visa denials, and weaponised cyberspace aimed at silencing watchdogs. Beijing bankrolls the grip by funnelling surveillance kit and political cover to likeminded regimes, while Moscow trades combat know-how and cheap arms. Across the Baltic-Nordic fringe, frontline EU states warn that Chinese cyber assets already relay intelligence to Russia, and that simultaneous crises—Taiwan strangled at sea, Baltic rail hubs hacked—could immobilise NATO. Yet Washington is slashing Voice of America, Radio Free Asia, and USAID media grants, and Brussels dithers over filling the gap. The result is a widening trust deficit: many in Asia now see Europe's "values-first" rhetoric as hollow, pointing to muted responses on Gaza and the EU's unwillingness to sanction Chinese enablers of the Kremlin.

Since the 2021 coup, 29,000 political prisoners endure torture, and more than 24,000 civilians have been killed, many by over 2,100 junta airstrikes. A devastating March earthquake compounded the misery; formal rescue teams were blocked by curfews and shaken donor confidence. Local civil society is now the state's only substitute—raising relief funds, teaching underground classes, and drafting bottom-up ideas for a future federal constitution. They also ferry intelligence across the Thai border even as Bangkok's police squeeze refugees for bribes and embassy officials refuse passport renewals, a textbook case of transnational repression. Western aid cutbacks risk crippling this ecosystem at the very moment Myanmar's resistance controls ninety-plus townships and starts installing basic services.

Traditional outlets have vanished in Hong Kong, been driven underground in Myanmar, and face bankruptcy if U.S. funding dries up; nineteen Hong Kong newsrooms closed in four years, and exile journalists now file from Taipei, Seoul, London, and Prague. Their survival depends less on grand grants than on visas, safe-haven laws, and satellite or broadband slots that carry their reporting back into censored homelands. European states could lead here—expediting humanitarian visas, underwriting cross-border data pipes, and shielding reporters from Beijing's and Naypyidaw's cyber-harassment squads. Without such lifelines, reliable information will cede even more ground to state propaganda, leaving both regions—and the democracies that claim to support them—dangerously uninformed.

Autocrats throttle civic space across Asia, Europe responds slowly

Grassroots networks sustain Myanmar despite airstrikes and quakes

Diaspora media, not big donors, now anchor free information

Panel 7:

2025: The year of EU-India relations?

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The January visit of the European Commission's full College to New Delhi signalled new urgency in Brussels: India, one of the few sizeable democracies outside the trans-Atlantic orbit, has become central to recalibrating supply chains, energy security, and foreign-policy partnerships shaken by Russia's war, global shocks, and Trump-era protectionism. Leaders on both sides want to revive the long-stalled EU-India FTA by year-end, deepen the new Trade and Technology Council, and connect India's green-hydrogen ambitions to Europe through the IMEC corridor. Central- and Eastern-European capitals, unburdened by colonial history, see chances in IT services, digitalisation, waste management, and clean-energy hardware, but panellists argued that only sustained political will, broader people-to-people links, and tightly focused cooperation will turn optimism into signed contracts.

Strategic urgency pushes Brussels and Delhi together

Everyday frictions, however, remain stubborn. Indian business travellers wait roughly four weeks for Schengen visa slots, while European firms face non-tariff barriers, congested ports, and local rules that can trap technology inside joint ventures. Infrastructure gaps, such as fifty-hour port dwell times and slow rail links, add cost and risk. Negotiators may park the toughest FTA chapters for later, while in parallel pursuing faster visas, mutual-recognition pilots, and an EU-India business platform that plugs smaller Central-European suppliers directly into Indian value chains. Success here would signal that practical fixes can keep momentum alive while bigger issues simmer.

Barriers slow trade, investment, and people-to-people ties

Delhi's "multi-alignment" endures: it buys discounted Russian oil, abstains in UN votes on Ukraine, sends humanitarian aid, and courts Washington and Brussels simultaneously. Panellists agreed India might contribute troops to a UN-mandated peace operation if the mandate were clear but cautioned that New Delhi will not endanger core interests. For the EU, the pragmatic course is to accept this hedging and chase early wins—clean-energy investment, smoother mobility schemes, and joint digital-identity projects—then track them rigorously rather than issuing ever loftier communiqués. Trust, they concluded, will grow from measurable progress, not rhetoric. Trust will grow from measurable progress, and regular scorecards would keep both sides accountable while spotlighting major breakthroughs.

Multi-alignment, not blocs, defines India's stance

Panel 8:

Making Taiwan-EU relations sustainable

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Taiwan now frames Europe not just as a distant “normative power” but as a strategic collaborator across security, technology and public health. An upgraded integrated diplomacy stresses three tracks: sustained high-level visits, active parliamentary outreach, and dense people-to-people exchange. Formal recognition is no longer the litmus test; practical relationships matter more. Central and Eastern European democracies are singled out as natural partners—sharing recent experience with authoritarianism. Achieving long-term sustainability, which would be able to anchor the relationship beyond election cycle is crucial. Stakeholders should be agile and creative, so that they can identify overlapping interests. While rhetoric symbolism is an important aspect of the mutual ties, substance needs to be prioritized. To ensure that substance has upper hand over mere symbolism, all actors must maintain a degree of proactivity.

European digital sovereignty goals hinge on Taiwanese know-how. Semiconductor supply remains pivotal, yet the opportunity space extends to chip design, green energy, aerospace and unmanned systems. Taiwanese investors deliver local jobs and “clean” supply chains that bypass the People’s Republic of China—exactly what Europe seeks for de-risking. Recommended next steps include a modular, legally light trade or investment framework, and targeted incentives that make Europe attractive to Taiwanese high-tech investors and talent, together with deeper, project-based R&D collaboration. A common toolbox to shield firms from political coercion—export bans, customs delays, cyber sabotage—would turn rhetorical solidarity into board-room confidence.

Stability in the Taiwan Strait is now categorised as a core European security interest. Rather than planning only for post-invasion aid, there is need for visible, multilayered deterrence: naval transits affirming freedom of navigation, and expanded civilian-protection cooperation (including dialogue on evacuation planning with interested ASEAN partners). A new EU “preparedness union” strategy could embed Taiwanese expertise in disaster management and hybrid-threat resilience. Trump-era volatility is viewed as an impetus for Europe to act autonomously—breaking long-standing taboos on defence-industrial cooperation with Taipei, especially in drone technology and dual-use components.

Whole-of-society ties must replace symbolic diplomacy

European tech resilience hinges on partnership with Taiwan

Joint deterrence must be a key EU priority





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