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CONFERENCE REPORT 2026

Geo-tech frontiers:

Europe's strategic stakes in the Indo-Pacific

CEIAS
Central European Institute of Asian Studies

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Slovak Foreign Policy Association

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The CEEasia Forum 2026 was fully held under the Chatham House rule; conclusions presented in this report cannot be attributed to any single speaker at the conference.

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

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CEEasia Forum 2026: A snapshot

35

countries represented at the event

2 conference days

8 panel discussions

37

speakers

150

conference participants

Introduction:

Geo-tech frontiers: Europe's strategic stakes in the Indo-Pacific

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

Abbridged version of opening remarks delivered at the conference by ***Matej Šimalčík****, CEIAS Executive Director.*

Europe's relations with partners across the Indo-Pacific region are now more than ever shaped by technological developments, and discourse centered on de-risking and strategic autonomy. This is why the CEEasia Forum 2026 conference focuses on the central topic, **Geo-tech frontiers: Europe's strategic stakes in the Indo-Pacific**.

Over the past year, the EU has responded to the **continuing bifurcation of the global system** and increasing geopolitical volatility by swiftly concluding **free trade agreements** with a variety of Indo-Pacific partners. Like with **India**, thanks to which we gained privileged access for EU exports to the world's most populous country of almost 1.5 billion people. Or with **Indonesia**, facilitating the EU's access to **critical raw materials** like nickel, a key commodity for the battery industry. And after approximately a decade of stalling, negotiations were recently also resumed with other key ASEAN partners—**Malaysia, Thailand, and the Philippines**.

Removing trade barriers has been one of the main tools in the EU's toolkit to speed up the implementation of **de-risking policies** by European businesses, pursuing the 'China plus one' strategy in order to **reduce over-dependence**—and the threat of its weaponizing—on China's manufacturing and materials supply chains. Fostering EU's relations with the members of the ASEAN bloc is central towards achieving this goal.

Across the Atlantic, the US has taken a markedly different approach to reducing dependency on China; one that relies on tariffs. But Europe has also been targeted by these protectionist measures, resulting in an unintended spill-over effect. **Pressured by China's overcapacity and America's mercantilism, Europe's ability to maneuver a two-front trade conflict is significantly constrained.** And the quest to de-risk from China faces headwinds, as some voices started to call for Europe's equidistant position, and a strategy of hedging, vis-à-vis both China and the US. However, despite frictions in the Transatlantic relationship, **none of the challenges that Europe faces with China have miraculously disappeared**. And if the Transatlantic alliance is to survive its 'winter of discontent,' it needs to be able to deliver solutions to shared challenges—like those posed by China.

In the quest to understand Europe's position in the world defined by geo-economics and geo-technology, we cannot avoid talking about **relations with Taiwan**. Facing a series of disruptions brought on by the global polycrisis—from the COVID-19 pandemic, through the Russian invasion of Ukraine, to China's supply chain weaponization—the ties between Europe and Taiwan have quickly expanded.

Our own research at CEIAS has shown a **fivefold increase in mutual interactions** between Europe and Taiwan between 2019 and 2024. New developments were accrued **across all levels of interactions**—political and security relations, trade and investment, as well as subnational relations and academic ties. But if Europe-Taiwan relations are to withstand future shocks, they **need to be futureproofed** to ensure long-term sustainability.

Technological cooperation and associated investment, especially in the semiconductor industry, are contributing towards this end. Developing the **Dresden fab of the European Semiconductor Manufacturing Company**, a joint venture between Taiwan's TSMC and Bosch, Infineon, and NXP, is a case in point. Central Europe is also reaping benefits from associated spill-over effects like the **founding of new startups** focusing on fabless design, as well as new research projects at our universities. These benefits can be further amplified by **relying on our diasporas** that have recently **evolved across key tech hubs of East and Southeast Asia**—in Japan, South Korea, Taiwan, or Singapore.

Securing global semiconductor supply chains is crucial for the sake of **safeguarding access to the mature node chips**, which are a key input for our **automotive industry**. But the importance of secure and resilient semiconductor supply chains goes beyond that.

Advancements in **artificial intelligence**, such as the reported raw power of Anthropic's Mythos model, mean that global power competition will be dictated now more than ever by c**omputing power**, access to **semiconductors**, and **critical raw materials** necessary for producing them.

However, as the global competition is increasingly turning geo-technological, and states in and out of Europe pursue **more pragmatic foreign policies**, we must also keep in mind potential **ramifications and costs**. Powered by advancements in AI, we can assume that **cyberattacks** of our adversaries will become more successful, **FIMI operations** more targeted and faster enacted. And dictators around the world will deploy **surveillance and repression systems** powered by facial and racial recognition software at scale.

Taken together, these developments show that Europe's Indo-Pacific policy is now defined by the need to secure resilience, diversify dependencies, and defend its economic and strategic interests in an increasingly contested global environment. **The EU's future role** in the region will depend on its ability to **combine openness with de-risking**, and **maintaining constructive ties** with a wide range of partners while **remaining vigilant to the actions of adversaries and rivals**. In that sense, the Indo-Pacific is not just a distant theatre of competition, but a central arena in which Europe's future will be shaped.

Panel 1:

The EU and ASEAN in a changing world order: Common challenges, shared responses

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Economic relations lie at the heart of EU-ASEAN ties

Economic ties remain the most concrete and productive dimension of EU-ASEAN relations, with bilateral trade in goods reaching €258 billion in 2024. The EU ranks among the region's largest foreign direct investors. Progress on free trade agreements has accelerated significantly, albeit not at the EU-ASEAN level. Deals with Vietnam and Singapore are already in place, a trade agreement with Indonesia was recently concluded, and agreements with the Philippines and Thailand are expected within the next two years. At the same time, the EU's strategy of "de-risking" rather than decoupling from China further increases the relevance of ASEAN members, as they are positioning themselves as strategic alternative suppliers to European markets amid ongoing global economic volatility.

Security cooperation remains uneven

Security cooperation between the EU and ASEAN is growing, though it remains uneven and largely driven by individual EU member states, in particular France and Germany, rather than a unified approach. The disruption of Russian arms supplies following the war in Ukraine has opened new opportunities for European defense companies in Southeast Asia, where countries are actively diversifying their military procurement. From a *Realpolitik* perspective, however, both regions' interest in freedom of navigation in the South China Sea largely depends on the US, with the European navies' presence mostly symbolic yet important for upholding international law.

Approaches to human rights issues still differ

One of the most nuanced areas of the EU-ASEAN relationship concerns differing approaches to democracy and human rights. The EU consistently links trade and cooperation agreements to human rights dialogues, with results uneven at best. While progress has been made in embedding rights provisions into agreements, implementation remains patchy in many ASEAN countries. ASEAN members, guided by a strong principle of non-interference, tend to favor quiet diplomacy over public condemnation, as illustrated by the ongoing engagement with Myanmar. The recent accession of East Timor to ASEAN is seen as a potentially significant development, introducing a strongly democratic voice that may shift internal dynamics on governance, accountability, and protection of human rights over time.

Panel 2:

Chip alliances: Building resilient semiconductor supply chains with Indo-Pacific partners

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Semiconductors are increasingly central to geopolitical competition

Over the past five years, there has been a rapid transformation in the role of the semiconductor industry in global politics. A series of crises exposed the fragility of highly globalized supply chains. The result has been a dramatic policy shift across major economies, with the US Chips and Science Act, the European Chips Act, and parallel Chinese funding programs all signaling that governments no longer trust markets alone to secure semiconductor supply. The broader direction of travel is clear - efficiency is giving way to resilience as the guiding principle of industrial strategy. In particular, China's ambitious strategy of developing a fully integrated domestic value chain and its growing prowess in legacy semiconductors are creating new pressures on Europe and also its international partners.

Europe is not staying idle, but challenges in the Chips Act implementation remain

Faced with ambitious strategies by key global actors, Europe has made meaningful strides in injecting new impetus into its semiconductor ecosystem, but significant structural challenges remain. The European Chips Act was designed around interconnected pillars with pilot lines, a common chip design platform, and competence centers. Yet implementation has been uneven, with timelines often misaligned. A widely noted gap is the lack of venture capital within the EU, forcing startups to seek funding outside the bloc. The Chips Act 2.0 is expected to introduce new measures that will target the wider supply chain across Europe and support demand creation for chips on the continent from end users.

Czechia and Slovakia bet on Taiwan

On the partnerships front, cooperation with Taiwan has proven to be a productive path in Central Europe, with a flurry of developments in Czechia, Poland and Slovakia. Beyond benefiting from the spillover effects of the ESMC investment in Dresden, R&D and talent development cooperation have seen major progress, helping both countries build on their pre-existing strengths to bolster their roles in the industry. In Czechia, three semiconductor centers supported by Taiwan are operating, spanning research, design, and supply chain research, while Slovak-Taiwan cooperation is developing with focus on power modules and packaging. Meanwhile, the potential for cooperation with Japan and South Korea remains largely untapped but is gaining traction in line with the growing importance of the “trusted partner” concept.

Panel 3:

What's next for transatlantic coordination on China?

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Despite strains, there is still a need for coordination across the Atlantic

The transatlantic community has repeatedly approached China through reactive, issue-by-issue responses rather than a coherent joint strategy. A recurring concern is that Europe risks repeating the mistake it made with Russia, by allowing strategic dependency to deepen until it becomes a liability. Uncoordinated policies on issues such as forced labor in supply chains mean that the EU and US often end up working in parallel on the same issues, risking a less efficient approach. And with the economic consequences of a conflict involving China, particularly over Taiwan, which are estimated to far exceed the already enormous costs of the war in Ukraine, the lack of structured transatlantic cooperation on China seems all the more alarming.

Europe's dependencies beget the need for a stronger position

Europe's dependencies on the United States run far deeper than those with China, spanning security, digital infrastructure, and energy. Meanwhile, China's continued support for Russia through dual-use technologies and financial transfers, its systematic interference in democratic institutions, and its attempts to reshape international organizations in favor of authoritarian norms make genuine strategic rapprochement with Beijing unlikely. The more constructive path is for Europe to strengthen its own position, increasing defense spending, building direct political communication channels with Washington, strengthening ties with other like-minded partners such as Canada, and developing a clearer, more assertive voice in defending its own interests, rather than looking at China as an alternative partner to the US.

Concrete actions can offer a way forward

Coordination on China offers a practical path to rebuilding trust within the transatlantic alliance, but only if it is grounded in shared priorities and a willingness to act. Key areas for swift progress include research and innovation security, critical raw materials and semiconductor supply chains, network security, and the removal of untrusted vendors from critical infrastructure. A framework of "hardened engagement", combining active diplomacy with resilience-building and deterrence, can be the guiding principle for dealing with China. Maintaining stability in the Taiwan Strait and the South China Sea is seen as a strategic convergence point of global importance. Ultimately, confidence-building requires a shared definition of what China represents: simultaneously a threat, a competitor, and a necessary interlocutor.

Panel 4:

Responding to the growing FIMI convergence between China and Russia

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Russia and China align strategically rather than coordinate deliberately

The convergence between Russian and Chinese foreign information manipulation and interference (FIMI) is best understood not as deliberate coordination, but as a strategic alignment of shared interests. Both countries benefit from eroding confidence in Western institutions and from suppressing external criticism of their domestic governance. This alignment is particularly visible in the amplification of narratives of "Western decline," the depiction of NATO as an aggressor, or the supposed instability of democratic systems. Chinese state media, for instance, adopted the Russian framing of the war in Ukraine. The most tangible real-world impacts of this convergence are felt in the Global South, where Russian legacy networks and China's growing economic and diplomatic footprint combine to shift public opinion away from Western democratic values.

The EU is hampered by its lack of competencies

While the EU has built meaningful capacity to monitor and respond to FIMI, including through the EEAS task forces and the newly established European Democratic Resilience Center, the interference dimension of FIMI warrants greater attention. Real-world examples such as Russia's weaponization of energy dependencies or attempts at interfering in Moldovan elections, or China's elite capture of EU policymakers, illustrate that disinformation is only a small component of a much broader destabilization toolkit. The EU's competence limitations prevent it from coordinating intelligence and financial investigations across member states, leaving critical blind spots. Weakened enforcement of the Digital Services Act, which, under pressure from the current US administration, shields major platforms from scrutiny, has left Europeans with limited ability to see how these platforms are being manipulated. Taiwan's "whole-of-society" model offers inspiration, but comes with its own cautionary lessons: widespread awareness of FIMI can itself be weaponized politically, and the work of countering FIMI may inevitably become a target for FIMI itself.

Artificial Intelligence brings new FIMI challenges

Artificial intelligence is fundamentally reshaping the FIMI landscape by drastically reducing the cost and human infrastructure required to produce and disseminate influence operations, opening the door to a wider range of actors beyond Russia and China. Two risks stand out as particularly long-term and structural. The first is data pollution: the possibility that large volumes of AI-generated disinformation, though often too crude to deceive human readers, are deliberately designed to corrupt the training datasets of future AI systems, gradually distorting the information environments they produce. The second is data hoarding: authoritarian actors, especially China, are accumulating vast asymmetric data advantages that will enable increasingly personalized and sophisticated influence operations.

Panel 5:

Friends in need, friends indeed: Where is the Europe-Taiwan cooperation headed?

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Europe's primary role is in peacetime support for Taiwan

Europe has a strong interest in supporting Taiwan, not merely on moral grounds, but as a pragmatic necessity. A conflict over Taiwan would have severe economic and security consequences for Europe. This makes support a rational choice rather than an act of solidarity alone. At the same time, direct European military intervention in a Taiwan Strait scenario would face major practical limitations, given the complexity of the operational environment. The more realistic and impactful role for Europe, therefore, lies in peacetime engagement and deterrence via economic means and sanctions.

CEE countries can be Taiwan's natural partners

Central and Eastern European countries are particularly valuable partners for Taiwan, largely due to their shared history of living under authoritarian rule, an experience that fosters genuine empathy for Taiwan's situation. Overall, there are roughly four kinds of states in Europe when it comes to cooperation with Taiwan: "Old Partners" (such as France, Germany, and the UK), "New Friends" (such as Czechia, Lithuania, Poland), "Pragmatists" (for example, Spain, Hungary, the Netherlands), and "Laggards" who are only beginning to engage. Defense-related economic cooperation, such as joint drone production between Poland and Taiwan, can serve the pragmatic interests of both sides simultaneously. Furthermore, Hungary's anticipated change in government can be an opportunity to gradually realign with the broader European approach to Taiwan and to become more open to engaging with Taipei.

Understanding Taiwan requires abandoning China-centric narratives and analytical models

Sustainable cooperation with Taiwan requires that we conduct rigorous analysis of mutual interests and their overlaps to achieve synergy. However, discussing Taiwan primarily through the lens of China policy risks reducing Taiwan to an afterthought rather than a partner valued in its own right. Many areas of cooperation, from research and development and trade and investment to tourism and cultural ties, have little inherent connection to China and should be pursued on their own merits. At the same time, completely ignoring the geopolitical dimension would be naive. China remains a factor influencing the Europe-Taiwan relationship, albeit not a defining one. Taiwan's soft power, rooted in its democratic values, rule of law, and cultural openness, is a largely untapped asset that could help reshape the narrative and strengthen the relationship on a broader societal level.

Panel 6:

Business opportunities for Central Europe in East Asia

Business opportunities for Central Europe in East Asia

'European' branding can be effective in Asia

Northeast and Southeast Asia offer significant and varied opportunities for Central European businesses, but success requires a focused, country-by-country approach rather than treating Asia as a single market. In terms of trade, good prospects lie in premium food products, baby goods, cosmetics, pharmaceuticals, and production machinery, particularly tailored technologies for recycling, food processing, and energy transition. Branding products as "European" rather than highlighting individual countries of origin tends to be more effective across most Asian markets, as Central European nations remain largely unknown to consumers, with a few exceptions, such as Czechia's or Slovakia's recognition in Vietnam due to long-standing cultural ties.

Singapore as a gateway for CEE businesses

Singapore represents perhaps the most important entry point for Central European businesses and investors looking to access Asia, given its political stability, English-language legal system, and world-class intellectual property protections. Asian financial markets, particularly real estate investment trusts, corporate bonds, and technology equities, offer notably higher returns than European equivalents. And the flow of opportunity runs in both directions; Asian investors, particularly from India and China, increasingly use Singapore-based structures to invest in European assets, making the city-state a genuine two-way bridge between the regions.

While state efforts may not always be successful, diasporas and chambers of commerce can help

Central European countries, however, still differ in their ability to engage with the Asian markets. In particular, Slovakia's economic diplomacy seems to be lagging behind its regional V4 peers such as Poland, Hungary, and the Czech Republic, which maintain far more active and better-resourced networks across Asia. However, simply increasing funding for government trade agencies may not be sufficient; what matters more is placing business-minded people on the ground who understand both commerce and local culture and can build trust-based relationships that drive deals in Asian markets. Diaspora networks and chambers of commerce are highly effective complements to formal state support, with concrete success stories, including Slovak energy drink exports to China, bicycle-component entry into Taiwan's supply chains, and talent exchanges in the automotive and energy sectors, demonstrating what is possible when the right connections are made.

Panel 7:

Europe in the global AI competition

Europe in the global AI competition

US and China lead the AI race; EU lags behind

The US and China represent the two dominant forces in global AI development, with fundamentally different approaches. The US leads at the frontier, driven by massive capital investment in large language models and a strong enterprise software ecosystem, while China focuses on applications, open-source adoption, and domestic chip development to compensate for restricted access to Nvidia hardware. Europe, meanwhile, controls only around 5% of global compute capacity and lags significantly in investment, though its industrial expertise and strengths in semiconductor components offer a credible niche. India occupies a distinct position: talent-rich but not competing at the frontier, instead focusing on cost-efficient models tailored to local languages, sectors such as healthcare and education, and the needs of the Global South.

Europe's AI strategy still faces major bottlenecks

Europe's AI policy landscape is active but fragmented, with numerous overlapping initiatives that can be difficult to navigate. Planned AI factories and gigafactories across the EU represent a significant ambition, yet the EU's compute capacity falls well short of a single major US data center currently under construction. A major structural bottleneck is energy, as European electricity prices are roughly three times higher than in the US, making it difficult to run data centers competitively. Some cities have already halted the construction of new facilities due to insufficient grid capacity. EU-India cooperation in AI, semiconductors, telecom standards, and 6G offers a promising strategic partnership, though the private sector pillar of this relationship remains underdeveloped and requires urgent attention.

Breakneck developments in AI require stricter focus on safety

The advent of more advanced AI systems, which can seemingly identify long-standing software vulnerabilities at scale, has major implications for cybersecurity, as both offensive and defensive capabilities are fundamentally reshaped. Equally pressing is the threat of AI-powered disinformation: synthetic influencer networks, photorealistic bot farms, and AI-generated voice phishing scams are already operational, and current detection methods are inadequate. Europe's lack of a dedicated AI safety institution means it relies entirely on self-reporting by model developers rather than independent testing, a gap that is increasingly hard to justify as model capabilities grow. AI development seems to be outrunning the policy cycle, making anticipatory research, forward-looking scenario planning, and investment in AI safety not optional extras but strategic necessities.

Panel 8:

Do human rights still matter under the pragmatic turn to the Indo-Pacific policy?

Do human rights still matter under the pragmatic turn to the Indo-Pacific policy?

As the EU deepens its Indo-Pacific engagement, a clear pattern emerges: human rights considerations are increasingly calibrated against economic and strategic weight. The EU-Vietnam relationship is a telling example, despite ongoing imprisonment of journalists and environmental activists, and an unfulfilled commitment to ratify ILO conventions on labor rights, trade ties have flourished, and the partnership has been upgraded. With India, the trajectory is more nuanced: what was once a point of tension is gradually evolving into a shared framework built on democratic values and mutual recognition of domestic complexity. The overarching picture is one of selective prioritization: with economic and security interests consistently setting the boundaries within which human rights can be raised.

Human rights are increasingly calibrated against economic and strategic considerations

China represents a structurally distinct challenge for the EU, one where economic interdependence has historically constrained meaningful human rights action. The initial internationalization of the Tibet issue generated genuine political support across Europe, but as EU-China economic ties expanded, high-level engagement with Tibetan representatives gradually receded. The situation in East Turkestan (Xinjiang) prompted stronger EU action, but China's retaliatory measures halved the momentum, even leaving the Comprehensive Agreement on Investments in limbo. Looking ahead, the Dalai Lama's succession may be an imminent flashpoint: with some member states, notably the Czech Republic, taking a principled stance, while others remain reluctant to risk straining their bilateral ties with Beijing.

EU-China economic ties interfering with talk on human rights

The rollback of US foreign aid, most visible in the sharp reduction in USAID funding, has created both a challenge and an opportunity for the EU. In many of the countries where the US was the primary development funder, European nations, led by Germany or France, are already the next-largest contributors, underscoring the potential to step up. The cuts are having immediate consequences for vulnerable communities: funding for civil society, refugee welfare programs, and independent media such as *Radio Free Asia* has already been significantly reduced. Despite the current headwinds, human rights will likely not permanently retreat from EU foreign policy, and the EU's institutionalized dialogue formats, civil society networks, and long-standing normative commitments provide a durable foundation, even if engagement becomes more selective and honest about its limitations in the years ahead.

With the current lapse in human rights funding, the EU can step up

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