

Foreword

The OECD Review of Innovation Policy: Germany 2022 is the 33rd in a series of OECD Country Reviews of Innovation Policy and is the first to cover Germany, following a request from the Federal Ministry of Economic Affairs and Energy (latterly the Federal Ministry for Economic Affairs and Climate Action, BMWK).

The COVID-19 pandemic and the Ukraine war have revealed vulnerabilities in Germany's economic model: undiversified energy supply, an over-reliance on fossil fuels, delayed digitalisation and disruptable supply chains. Digital technologies may significantly disrupt manufacturing industries Germany has dominated for decades, threatening future competitiveness. The green transition also requires significant industrial transformations. Germany can call upon one of the world's most advanced innovation systems in dealing with these challenges, but a new more agile and experimental approach to STI policy is needed. This Review outlines how to develop such an approach and what STI policies need to focus on: create markets for future innovations, more significant and more risk-tolerant finance for innovation, inter-disciplinary knowledge exchange, improved data infrastructure and capabilities. Given the internationally shared challenges of dealing with transitions, the insights presented in the review will be of interest to policymakers, stakeholders and analysts from Germany and across the OECD.

This Review is relevant to a broad array of stakeholders in Germany, including government officials and policymakers, as well as representatives of the private sector and civil society. Owing to the globally important nature of the German STI system, the findings of this Review is also of interest to policymakers from across the OECD and beyond as many challenges Germany faces are shared and solutions identified can serve as inspiration in other contexts. The Review was launched on the 4th October 2022 at an event in Berlin, hosted by the BMWK.

The Review was led by Caroline Paunov, Head of the OECD-TIP Secretariat and Senior Economist. The main authors of the Review were Caroline Paunov and Luke Mackle, Policy Analyst at the OECD, drawing on various key contributions. The Review draws on an extensive background report prepared by Christian Rammer of the Leibniz Centre for European Economic Research (ZEW) and Stephanie Daimer, Rainer Frietsch, Hennig Kroll and Rainer Walz of the Fraunhofer Institute for Systems and Innovation Research (Fraunhofer ISI). Sylvia Schwaag Serger, Professor at Lund University, provided invaluable inputs to the report, particularly to chapters 5 and 15. Pluvia Zuniga, Senior Consultant to the OECD, contributed in particular to chapters 10, 11, 12 and 13. Erik Arnold, Senior Partner at Technopolis and Honorary Professor at the Manchester Institute of Innovation Research, contributed to chapters 5 and 14. All provided critical research, analytical and drafting support to numerous sections of the Review. Jan Einhoff, external consultant to the OECD, provided valuable research and drafting support to the Review, particularly to chapter 8, and supported the organisation of the two rounds of interviews. Laura Kreiling, Policy Analyst at the OECD, similarly provided valuable and extensive support to chapter 13 and to the organisation of the interviews. Nikolas Schmidt, Policy Analyst at the OECD, provided significant research, drafting, and preparation support in all sections of the Review.

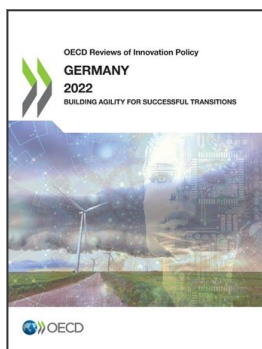
The Review team is grateful to the request from the BMWK to conduct this Review and the support provided by the BMWK throughout the process. In particular Ole Janssen, Deputy Director General of the

Department for Innovation and Technology Policy and Ulrich Romer, Head of Unit and their team, including Rebecca Leinen, Verena Mertins, and Magda Kemper were a constant source of support.

The Review and its eventual publication would not have been possible without the support of colleagues within the OECD Directorate for Science, Technology and Innovation (STI). Andrew Wyckoff, Director of the OECD STI, Dirk Pilat, former Deputy Director, and Alessandra Colecchia, Head of the Division for Scientific and Technological Policy of the OECD STI provided substantial comments. Blandine Serve provided extensive statistical and data visualisation support. The Review team is indebted to Romy de Courtay for her excellent editorial services. Sylvain Fraccola and Sebastian Ordelheide supported on the communications and design elements of the Review process.

The Review also benefited from feedback and comments from numerous colleagues, within the OECD and externally. As part of the Review process, the OECD Working Party on Innovation and Technology Policy (TIP) discussed the Review at its meetings in June 2021, December 2021 and June 2022 and organised several peer group review sessions with TIP delegates. The Review team is grateful to the contributions received from Christian Busch, Jacopo Cricchio, Alberto Di Minin, Göran Marklund, Byeongwon Park, Lennart Stenberg and to participants in TIP sessions on the Review and for the valuable inputs they provided. The Secretariat is also grateful to colleagues from the OECD Economics Department, the OECD Directorate for Trade and Agricultural Policy, the International Energy Agency (IEA) and colleagues from other divisions of the STI Directorate, all of whom provided valuable guidance and feedback on various sections of the Review. Similarly, the Review Team is grateful to the BMWK and the German Federal Ministry of Education and Research (BMBF) for their timely and valuable feedback on all sections of the Review. The Review team is also grateful for the revision and official declassification of the Review by the members of the OECD Committee for Science and Technological Policy (CSTP).

The TIP Secretariat would like to particularly thank the more than 100 people that participated in the fact-finding interviews of this Review in April/May 2021 and November 2021. The participation of those involved helped the Review team to ensure that the Review reflected the experiences and concerns of a diverse range of stakeholders.



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