

Foreword

Innovation, Agricultural Productivity and Sustainability in Estonia is part of the OECD Food and Agricultural Reviews series. This review was undertaken at the request of the Estonian Ministry of Rural Affairs. We are particularly grateful for the support for this study from the Toomas Kevvai, Deputy Secretary General for Food Safety, Research and Development in the Estonian Ministry of Rural Affairs.

The review examines the conditions in which farms and businesses in Estonia undertake innovation in the food and agriculture sector to become more productive and environmentally sustainable. It starts with an overview of the food and agriculture sector and outlines development challenges and opportunities (Chapter 2). A wide range of policies which influence incentives for innovation are then examined: economic stability, governance and trust in institutions (Chapter 3); a favourable and predictable environment for investment (Chapter 4); capacities and public services enabling business development (Chapter 5); agricultural policy (Chapter 6) and the operation of the agricultural innovation system (Chapter 7).

Estonian policies are analysed following a framework developed by the OECD as part of its work on agricultural innovation and in response to a request from the G20 in 2012 under the Presidency of Mexico to evaluate the extent to which a wide range of policies facilitates productivity growth and sustainability in food and agriculture. The framework has been applied to Australia, Brazil, Canada, the Netherlands, Turkey and the United States and additional reviews are underway or planned.

This review was prepared by Catherine Moreddu and Laura Munro from the OECD Trade and Agricultural Directorate and in close collaboration with the Estonian Ministry of Rural Affairs under the leadership of Helena Pärenson. Karine Souvanheuané and Urszula Ziebinska provided statistical support. Martina Abderrahmane provided editorial assistance and publication support.

The review draws heavily on a comprehensive report prepared by experts from the Institute of Economics and Social Sciences of the Estonian University of Life Science, led by Ants-Hannes Viira, on behalf of the Ministry of Rural Affairs. The review also draws on OECD analysis in various economic and social policy fields and includes cross-country comparable indicators.

At the Institute of Economics and Social Sciences of the Estonian University of Life Science, Anne Põder, Kersti Aro, Katrin Kreegimäe, Helis Luik, Jelena Ariva, Katri Kall, Liis Oper, Birgit Maasing, Katrin Lemsalu, Anu-Ell Visberg, Viia Parts, Raul Omel, Mati Mõtte and Ants-Hannes Viira provided the information for Chapters 2 to 7, with contributions from Külli Kõrgesaar in translating the materials from Estonian to English.

This report has benefitted from detailed comments from Toomas Kevvai, Külli Kaare, Mai Talvik, Kristel Maidre, Reena Osolin, Sille Teiter, Katre Kirt, Eveli Naaris, Marika Ruberg, Reelika Päädam, Reno Paju, Veronika Vallner-Kranich, Ragni Koitmaa, Erkki Miller, Eike Lepmets, Merle Saaliste, Kristi Lember, Tiina Vares from the Estonian Ministry of Rural Affairs, Ants-Hannes Viira and his colleagues from the Institute of Economics and Social Sciences of the Estonian University of Life Science, and Marju Aamisepp, Eduard Matveev from the Rural Economy Research Centre as well as Eneli Viik from the Agricultural Research Centre. It has also received valuable comments from Carmel Cahill, Frank Van Tongeren, Morvarid Bagherzadeh, Olga Melyukhina, Guillaume Gruère, Jussi Lankoski, Emily Gray, Shingo Kimura and Michael Ryan of the OECD Trade and Agricultural Directorate, and Caroline Klein of the OECD Economics Department.

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