

## *Foreword*

This review draws on the experience of the OECD country reviews of innovation policy which, over the past years, have covered both advanced countries recognised as global leaders in innovation as well as emerging economies with fast-evolving capabilities in S&T and innovation.\* It also complements the existing country reviews by providing a first mapping of science, technology and innovation in a major world region. Specifically, the review provides:

- A cross-country, regional synthesis that highlights recent economic developments with special reference to innovation and provides a quantitative and qualitative mapping and assessment of current capacity and dynamics in S&T and innovation in Southeast Asia, including intra- and extra-regional knowledge flows.
- A set of country profiles describing the state and dynamics of national innovation systems of Southeast Asian countries. These profiles draw on the OECD country innovation policy review approach; they cover the performance and institutional profile of national innovation systems and take into account the economic environment and framework conditions for innovation.

This review benefited from, and would not have been possible without, the active support of Southeast Asian countries. It aims at:

- Obtaining a more comprehensive understanding of the key elements, relationships and dynamics of innovation systems in Southeast Asia and the opportunities to enhance them.
- Providing a platform and starting point for launching in-depth reviews of innovation policy of individual Southeast Asian countries. A first in-depth review of this kind, the joint OECD-World Bank science, technology and innovation review of Viet Nam, is currently under way.
- By carrying out and disseminating the results of the review, facilitating mutual learning and helping enhance mutually beneficial S&T and innovation co-operation between Southeast Asian and OECD countries.

The review is intended to be relevant to a wide range of stakeholders in and outside the Southeast Asian region and the OECD, including government officials, entrepreneurs and researchers as well as the general public. It also contributes to the role of the OECD as a communication platform by providing an accessible and comprehensive presentation of innovation in Southeast Asia to a global audience.

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\* [www.oecd.org/sti/innovation/reviews](http://www.oecd.org/sti/innovation/reviews)

This review was initiated by Christoph Elineau, Coordinator of the EU-funded SEA-EU-Net Science Partners Project, with the support of Gerold Heinrichs of the International Bureau of the German Federal Ministry of Education and Research (BMBF), who proposed to the OECD's Directorate for Science and Technology (DSTI) a regional review of innovation in Southeast Asia drawing on the experience of the OECD country reviews of innovation policy. This initiative was subsequently taken up by the BMBF, Germany, and the Japan Science and Technology Agency (JST), which, along with the SEA-EU-Net project, jointly supported the review financially, and the Korean Science and Technology Institute (STEPI) which supported it in kind. Importantly, the initiative was endorsed by the ASEAN Committee on Science and Technology (ASEAN COST) which actively supported the project.

The review was led by Jean Guinet (formerly Country Review and Outlook Division [CSO], DSTI, OECD) until December 2010 and by Gernot Hutschenreiter (CSO, DSTI, OECD) since then. Gang Zhang (CSO, DSTI, OECD) played an instrumental role in its initiation and design as well as in project co-ordination, in particular for external relations.

Fact-finding missions were carried out in seven countries by two teams. One team, led by Gernot Hutschenreiter, consisted of Atsushi Sunami, Associate Professor (in Indonesia), National Graduate Institute for Policy Studies, Japan; Taeyoung Shin, Senior Fellow, Science and Technology Institute, Korea; Ulrike Tagscherer, Researcher, Fraunhofer Institute for Systems and Innovation Research, Germany, and Associate Professor, Chinese Academy of Sciences; and Masahito Yano, Senior Project Co-ordinator at the Singapore Office, JST, Japan. This team carried out interviews in Indonesia, Cambodia (joined by Junko Chapman, Fellow, Centre for R&D Strategy, JST, Japan, and Alexander Degelsegger, Centre for Social Innovation, Austria) and Viet Nam (joined and led by Jean Guinet). A second team, led by Gang Zhang, consisted of Michael Keenan (CSO, DSTI, OECD), Fujio Niwa, Emeritus Professor, National Graduate Institute for Policy Studies, Japan, Takeshi Usami, Chief, Department of International Affairs, JST, Japan, and Atsuya Yamashita, Director of Singapore Office, JST, Japan. This team carried out interviews in Thailand, Malaysia and Singapore. Several members of the two teams (joined by Emi Kaneko Ueda, Chief, Department of International Affairs, JST, Japan) also conducted interviews in Laos.

Numerous experts and stakeholders contributed their insights and time in interviews conducted during the fact-finding missions. Special thanks are due to all those who helped to co-ordinate and facilitate the interviews of the fact-finding missions, and in particular: Makara Khov, Institute of Technology in Cambodia; Franz Gelbke, Advisor at the Ministry of Research and Technology (RISTEK), in Indonesia; Sengchanh Phasayaseng, National Authority of Science and Technology, Department of Science and Technology, Prime Minister's Office, in Laos; Academician Dato' Ir. Lee Yee Cheong, Chairman of the Governing Board, International Science and Technology and Innovation Centre for South-South Co-operation under the Auspices of UNESCO, and Nik Ahmad Faizul Abd Malek, Malaysian Industry-Government Group for High Technology, in Malaysia; Walter Lee, CEO, E-Cop, in Singapore; Simon Grimley, National Science and Technology Development Agency (NSTDA), Ketmanee Ausadamongkol, Thailand Productivity Institute, Nares Damrongchai and Kanchana Wanichkorn, National Science Technology and Innovation Policy Office, in Thailand; and Le Xuan Dinh, of National Agency for Science and Technology Information (NASATI), in Viet Nam.

Supported by national delegates to the ASEAN COST, background reports were prepared by national experts as follows. The background report on Cambodia was provided by Makara Khov, Institute of Technology of Cambodia; on Indonesia by Yanuar Nugroho (lead author), Manchester Institute of Innovation Research, University of Manchester, United Kingdom, and Irsan A. Pawennei and Mirta Amalia, both Centre for Innovation Policy and Governance, Indonesia; on Laos by Sengchanh Phasayaseng; on Malaysia by K. Thiruchelvam, Ng Boon Kwee, and Wong Chan Yuan, University of Malaya, and V.G.R. Chandran of Universiti Teknologi Mara, Malaysia; on Singapore by Poh-Kam Wong and Annette Singh, of National University of Singapore, Singapore; on Thailand by Patarapong Intarakumnerd of College of Innovation, Thammasat University, Thailand; and on Viet Nam by Le Xuan Dinh, NASATI, Viet Nam. Taeyoung Shin contributed a background report based on the findings of the fact-finding missions in Indonesia, Cambodia, Viet Nam and Laos, while Ulrike Tagscherer contributed a background report on science and industry relations in Indonesia and Viet Nam.

Annex A on China-ASEAN relations from a Chinese perspective was drafted by Jianglin Zhao, Institute for Asia and Pacific Studies, Chinese Academy of Social Sciences.

The review report was prepared for publication by Michael Keenan under the overall responsibility of Gernot Hutschenreiter and with contributions and support from Dimitrios Pontikakis (all CSO, DSTI, OECD). Valuable contributions in various forms and at different stages were received from Koen de Backer and Andrea Beltramello with support from Laurent Moussié (Structural Policy Division [SPD], DSTI, OECD) on trade and global value chains, Daniel Kupka (CSO, DSTI, OECD), Emanuel Hassan (consultant to the OECD), and Margot Schüller, Senior Fellow, German Institute of Global and Area Studies, Germany. Candice Stevens (consultant to the OECD), Ken Guy (Science and Technology Policy Division [STP], DSTI, OECD, and consultant at the time of contributing) supported by Richard Scott (STP, DSTI, OECD) made important contributions that brought the country profiles to their final form.

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