

The Renaissance of Industrial Policy Worldwide



Productive
planning

Daniel Schteingart
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Paula Isaak
Juan Manuel Antonietta
Matías Ginsberg

Document 1

Series
Industrial policy
in the 21st century

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- Generate Wealth
- Promote Welfare
- Transform the State



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Index

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5	Introduction
6	The different eras of industrial policy
7	Figure 1. Total number of industrial policy interventions (2010-2022)
7	Figure 2. Spending on industrial policy (% of GDP) (2019)
8	Five reasons behind the revival of industrial policy
8	Figure 3. Share of total global exports of manufactured goods (1985-2022)
10	The new consensus on industrial policy
12	References

Introduction

Over the past two centuries, the manufacturing sector has played a central role in the economic and technological development of major economic powers. Several factors explain this: mastering advanced industrial technologies has been crucial not only for enhancing each country's military capabilities but also for strengthening their position in international trade and improving the quality of life for their populations.

The central role of the manufacturing sector on a global scale explains why, throughout history, countries have implemented industrial policies. These policies are a type of public intervention aimed at transforming the productive structure of an economy to achieve specific social and economic objectives. Among these objectives are accelerating long-term economic growth, creating formal and well-paid jobs, improving productivity and competitiveness, promoting exports and generating genuine foreign exchange, fostering technological innovation, reducing territorial inequalities, and, particularly for major powers, ensuring national security. In recent years, industrial policy has also incorporated environmental objectives, such as transitioning production structures toward more sustainable models.

To achieve these objectives, industrial policy employs a wide array of tools that alter market incentives for private companies. These include promotion (through subsidies for exports, investment, research and development, worker training, etc.), financing (via subsidized loans or credit guarantees), trade protection against imported competition, production by public companies in strategic sectors, standards mandating a minimum use of national inputs, and public procurement. Additionally, technological policies—such as infrastructure development for tech centers or labs and intellectual property regulation—labor policies that emphasize training and skill development, educational policies focused on investing in tertiary institutions, and scientific policies that support building science and technology infrastructure, can also be regarded as tools of industrial policy (Chang & Andreoni, 2020; O'Farrell et al., 2021; Rodrik et al., 2023; Hauge, 2023).

In recent years, after being absent from the agenda for several decades, industrial policy has made a 'comeback' in major powers. But why? What characteristics define this new industrial policy? How can it serve as a basis for developing industrial policies in emerging economies? The objective of this document is to address these questions.

Before proceeding, a terminological clarification is necessary. While the term 'industrial policy' may seem to refer solely to the manufacturing sector, it is often used interchangeably with 'productive policy,' thereby encompassing other sectors as well¹. Here, our discussion of industrial policy will focus primarily on the manufacturing sector, though not to the exclusion of other areas.



¹ The concept of "industry" is of Latin origin and, rather than referring merely to manufacturing, it means activity, ingenuity, and know-how, which involves the rest of the productive sectors (Lavarello & Sarabia, 2017).

The different eras of industrial policy

After a major post-World War II boom driven by a dirigiste approach to public policy—not only in communist countries but also in most capitalist ones—industrial policy receded to the background toward the end of the last century. This shift was propelled by a dominant new paradigm that favored economic liberalization and market mechanisms over the interventionist role of the state in productive development (Evans, 1996). The discourse highlighted the virtues of trade and financial liberalization and fiscal austerity, encapsulated in statements like "the best industrial policy is none at all."²

However, this discourse—which peaked in the 1980s and early 21st century—was not uniformly adopted across the globe. While industrial policy was largely sidelined in many developing regions, such as much of Latin America, it gained momentum in several Asian emerging economies, with China as a prime example. In developed countries, certain industrial policies persisted through subsidies, public procurement, and support for advanced technological development, particularly in the military sector. In the United States, initiatives like DARPA projects, the Buy American Act, Defense Department-funded R&D, ongoing NASA support, the Manufacturing Extension Partnership (MEP), and subsidies from the National Institutes of Health (NIH) were among the many efforts by successive administrations to boost innovation in the productive sector. Europe also pursued significant initiatives, such as Germany's Fraunhofer network, a system of research institutes focused on applied science and innovation. In addition, the U.S. and Europe maintained policies to protect sectors like agriculture, through programs like the Farm Bill and the Common Agricultural Policy (CAP), respectively, as well as through non-tariff measures that, in some cases, extended to certain manufacturing industries (Lavarello & Sarabia, 2017; DiPippo et al., 2022; Argentina Productiva 2030, 2023; Andreoni, 2016)³. Beyond these tools, industrial policy in these countries operated at a lower intensity than in the post-war era, focusing more on preserving R&D than on directly supporting manufacturing facilities.

However, following the 2008-2009 financial crisis—and especially in recent years—industrial policy has regained prominence in both discourse and practice. Juhász et al. (2023) highlight a notable surge in industrial policies worldwide between 2010 and 2022, with significant turning points observed in 2018 and 2021 (Figure 1)⁴.

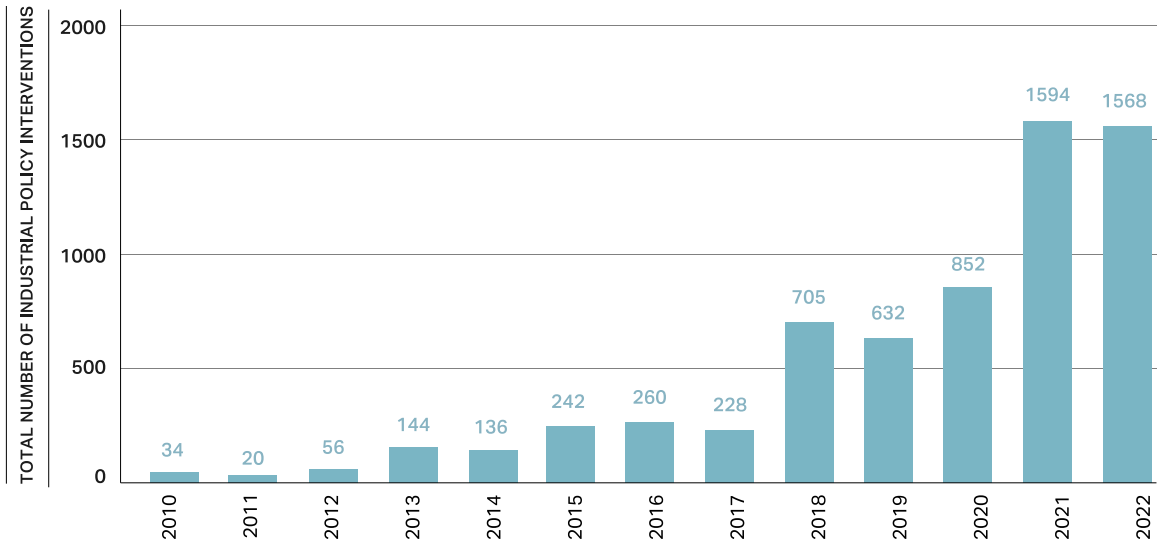
² The phrase belongs to Nobel laureate in economics Gary Becker and dates back to 1985.

³ The Farm Bill consists of a series of laws that define U.S. agricultural policy. DARPA is the U.S. Department of Defense agency that has developed military technologies with civilian applications, such as the internet and GPS. The Buy American Act is a law that promotes local industrial production in government public procurement in the United States. The MEP is a program by the National Institute of Standards and Technology that provides support and technical assistance to small and medium-sized manufacturing companies to improve their competitiveness and efficiency. The NIH are U.S. institutes that provide funding for research in health and life sciences. The CAP is the EU policy that, among other things, subsidizes farmers.

⁴ The authors built a record of industrial policies promoted between 2010 and 2022 using a machine learning algorithm that classifies industrial policies with data from the Global Trade Alert (GTA). Each intervention is counted as an event, regardless of its magnitude.

Total number of industrial policy interventions (2010-2022)

Figure 1

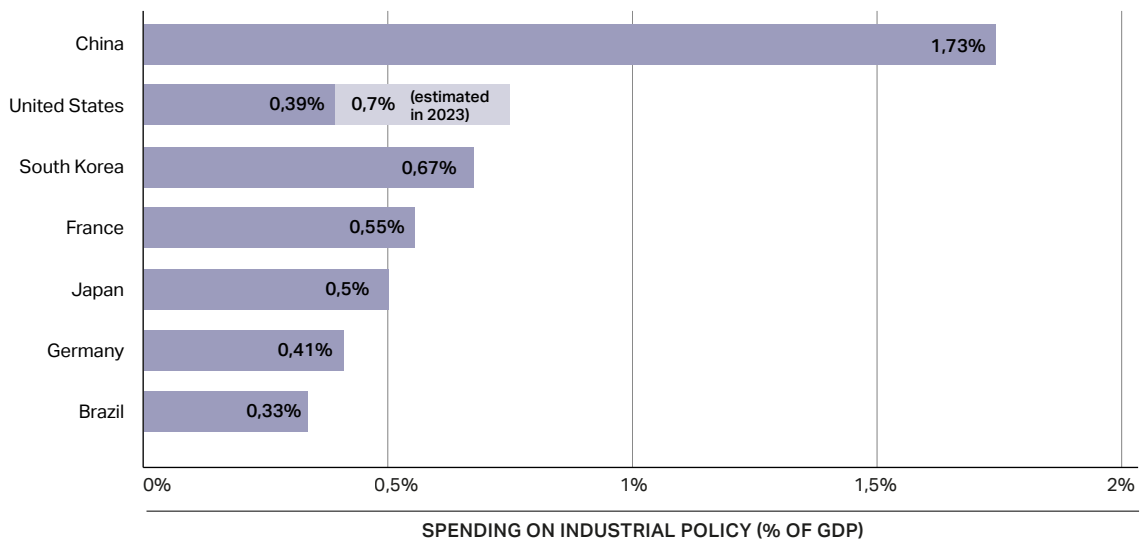


Source: Fundar based on Juhász *et al.* (2023).

The upward trend has intensified notably in recent years, with the proliferation of highly ambitious industrial policy initiatives in both developed countries and several emerging economies. Key examples include the Inflation Reduction Act (IRA) and the CHIPS and Science Act in the United States, launched in 2022, which have increased industrial policy spending as a percentage of GDP from 0.39% to 0.70% in that country between 2019 and 2022 (see Figure 2); the European Industrial Strategy (published in 2021); the Korean New Deal (from 2020); the Made in China 2025 Plan (launched in 2015); and the recent "New Industry Brazil 2024-2026" Plan, published in January 2024⁵.

Spending on industrial policy (% of GDP) (2019)

Figure 2



Source: Fundar based on DiPippo *et al.* (2022) and The Economist (2022).

Five reasons behind the revival of industrial policy



⁵ See for example [Argentina Productiva 2030 \(2023\)](#).

Five reasons behind the revival of industrial policy

Several factors lie behind the revival of industrial policy. One of the main drivers is the growing technological rivalry between China and the United States. In the 21st century, Chinese products have dominated global markets, establishing China as both the world's leading exporter and a key trading partner for much of the world⁶. Initially, during the last two decades of the 20th century, this dominance was limited to inexpensive, low-tech goods such as textiles, apparel, footwear, and toys. However, it has since expanded to more complex and higher-quality products, including a wide array of capital goods, transportation equipment, and chemical and electronic products. China's global influence is particularly notable in manufactured goods, where it now accounts for 22.3% of total global exports (see Figure 3), ten percentage points above its share of total goods and services exports.

Share of total global exports of manufactured goods (1985-2022)

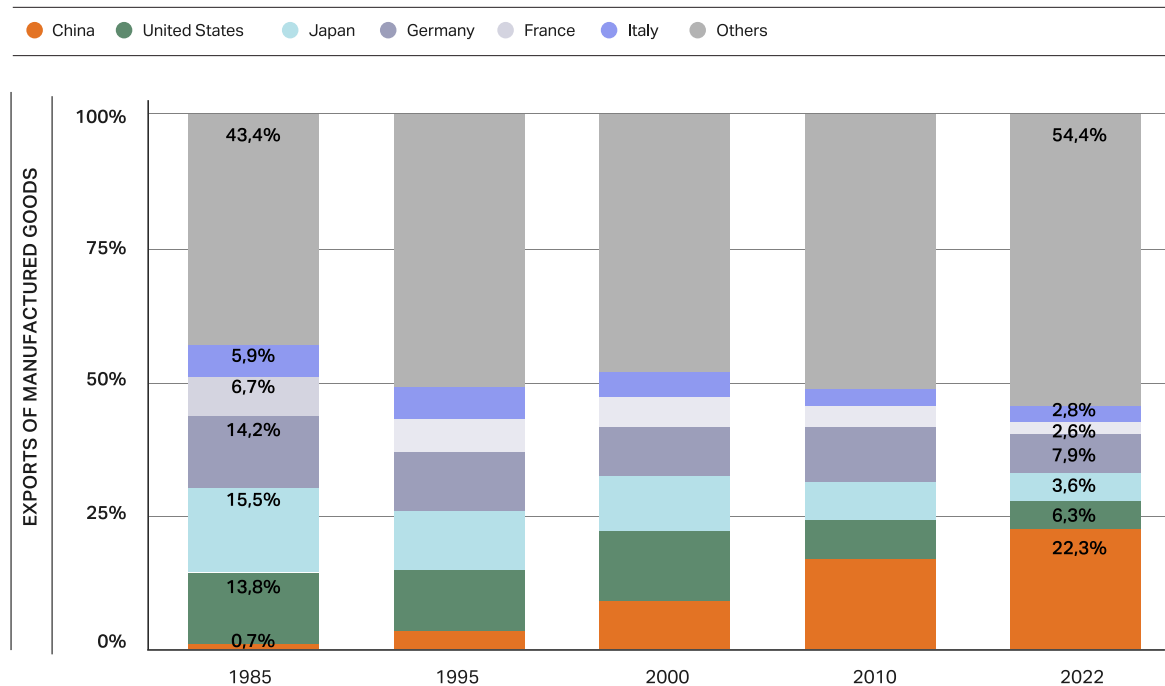


Figure 3

Source: Fundar based on World Bank data.

The offshoring process to China, initiated in the 1970s with the Mao-Nixon agreement and strengthened by Deng Xiaoping's reforms, allowed U.S. companies to reduce production costs by leveraging China's cheap labor force. Through this shift, they retained R&D, design, branding, and marketing functions in the United States while relocating manufacturing to China, either via their own subsidiaries (offshoring) or by subcontracting to local firms (outsourcing). This enabled consumers to access lower-cost imported industrial goods. However, it also led to factory closures in the U.S., contributing to the weakening of the working class and limiting its ability to benefit from productivity gains in subsequent decades. Similar manufacturing relocations occurred in other industrial powers, such as

⁶ In 2020, China became the top trading partner for 79 countries, whereas twenty years earlier, this number was under 10. In comparison, the United States was the primary trading partner for "only" 33 countries, most of them in Latin America and the Caribbean. By contrast, in 2000, this figure stood at 51 countries.

Western Europe and Japan, and extended beyond China to other peripheral countries, particularly in East Asia, Eastern Europe, Central America, and Mexico (Arceo, 2011; Schteingart, 2023).

However, the scale and global impact of China's development have been particularly profound. China seized the opportunity to pursue a rapid process of technological learning, something that did not occur in all peripheral countries that received foreign investment for manufacturing. For China, mastering production know-how was merely the first step in a development strategy that scaled significantly, supported by substantial public investment in infrastructure and a comprehensive set of industrial, scientific, and technological policies.

Today, China ranks as the second-largest investor in R&D globally, trailing only the United States and well ahead of the European Union as a whole⁷. In 2023, China allocated 2.6% of its GDP to R&D—four times its investment levels from the 1990s and, by far, the highest among middle-income countries⁸. At the same time, China has come to dominate production chains in sectors such as wind and solar energy, electric vehicles, batteries, commercial drones, cell phones, active pharmaceutical ingredients, and 5G, among others. It has also emerged as a major player in artificial intelligence⁹. Thus, the magnitude of China's economy, its geopolitical impact, and its control over critical technologies have become a threat to Western hegemony in general and U.S. hegemony in particular.

In recent years, the United States has responded to the Chinese challenge through a range of coordinated initiatives. The Inflation Reduction Act and the CHIPS and Science Act of 2022 are not isolated efforts but part of a broader strategy that includes increased tariffs on Chinese products, sanctions on specific companies (such as Huawei), and alliances aimed at blocking the export of critical technologies to China—such as lithography machines produced by the Dutch company ASML, which are essential for manufacturing advanced chips.

A second factor driving the global resurgence of industrial policy is the pursuit of greater autonomy in an era where growing interdependencies—shaped by the rise of global value chains—have introduced vulnerabilities into national economies. The COVID-19 pandemic, the Russia-Ukraine war, and the intensifying U.S.-China rivalry have underscored the importance of domestic production for national sovereignty, challenging the late-20th-century approach that often underestimated the role of domestic manufacturing. During the pandemic, it became evident that countries with domestic production of medical equipment, pharmaceutical products, and vaccines were better positioned to save thousands of lives. Similarly, the Russia-Ukraine war has highlighted the value of self-sufficiency in energy, food, and fertilizers for bolstering geopolitical and economic resilience. Additionally, both the United States and Europe have expressed growing concern over their reliance on semiconductors—predominantly produced in Taiwan and China—a crucial component for electronics, as well as defense and national security industries.

The COVID-19 pandemic, the Russia-Ukraine war, and the intensifying U.S.-China rivalry have underscored the importance of domestic production for national sovereignty.

A third driver behind the resurgence of industrial policy is climate change. Mitigation efforts are prompting substantial investment in major economies, aimed at developing technologies to decarbonize production. Interest in goods and services related to the energy transition—such as electric vehicles, batteries, carbon capture and storage technologies, renewable energy, green hydrogen,

⁷ Data from OECD at current prices.

⁸ Data from [Statista](#).

⁹ See for example [Special Competitive Studies Project \(2023\)](#) and [Artificial Intelligence Index Report \(2024\)](#).



small modular nuclear reactors, and energy-efficient devices—has been growing rapidly. In other words, strategic markets and technologies are emerging to tackle climate change. Dominating these markets and decarbonizing domestic production will be key sources of competitiveness in the future, which is why current industrial policy incentives are strongly focused on fostering a sustainable economic transition.

A fourth reason for the growing interest in manufacturing-oriented industrial policy is the idea that several branches of manufacturing can create higher-quality jobs compared to the economy's average, with strong multiplier effects on other sectors and, consequently, great potential for promoting upward social mobility (Sullivan, 2023)¹⁰. In both the United States and Europe, the relocation of manufacturing activities to the periphery negatively impacted social cohesion, creating an increasingly dual society, with some groups benefiting from this process (for instance, elites and urban areas tied to a globalized knowledge economy) and others experiencing a decline (or, at best, modest improvements) in quality of life (such as significant segments of the former manufacturing working class, who transitioned to lower-productivity, lower-wage service roles). This dualism has contributed to numerous social issues—such as rising inequality and loss of trust in elites/governments/experts—and has been one of the drivers behind the rise of populism, particularly right-wing populism (Rodrik and Sabel, 2019).

Finally, a fifth factor contributing to the resurgence of industrial policy is the recent emergence of methodologically robust studies, which generally demonstrate positive impacts of industrial policies across areas such as economic growth, exports, innovation, regional development, and job creation, among others¹¹. While these studies have yet to directly influence government practices, their impact is beginning to resonate in academia and the economic mainstream, which has historically been skeptical of industrial policy due to concerns about market distortions¹². Consequently, rather than debating whether or not to pursue industrial policies, the focus today is shifting toward how to implement them effectively.

The new consensus on industrial policy

The resurgence of industrial policy and the increasing academic interest have reached a critical juncture: even economists from institutions that have traditionally criticized its use, such as the International Monetary Fund, are beginning to acknowledge its potential benefits¹³. In this context, a "new consensus" has emerged regarding what industrial policy should and should not entail. This consensus can be summarized in twelve key principles¹⁴:

1. It should contribute to improving the quality of life of the population by creating good jobs.
2. It should be more offensive than defensive, promoting exports, R&D, productivity improvements, and the growth of new high-tech sectors, rather than merely preserving jobs in sectors with low competitive potential that are threatened by foreign competition.

¹⁰ In a highly influential 2023 [speech](#), Jake Sullivan, National Security Advisor to the Biden administration, noted that one of the key drivers behind the resurgence of industrial policy in the United States is the creation of quality jobs in industries that are strategic for the transition to a green economy. The idea is that climate change can be a powerful catalyst for innovation in clean technologies, generating jobs that contribute to rebuilding a more equal and cohesive middle-class society.

¹¹ See [Lane \(2020\)](#) and [Juhász et al. \(2023\)](#) for a literature review.

¹² Mainstream economics has historically been skeptical of industrial policy, primarily due to its trust in the power of markets to allocate resources optimally without state intervention. This skepticism largely emerged from the free-market paradigm promoted by neoclassical theory, which holds that markets, when in equilibrium, maximize efficiency and welfare. From this perspective, any intervention that favors specific sectors over others—as is typical in industrial policies—could distort resource allocation and create inefficiencies. Additionally, there was concern that governments not only lacked sufficient information to correctly identify which sectors to support but were also vulnerable to lobbying and corruption, potentially leading to poor decisions and waste of resources.

¹³ Regarding the works by IMF economists on industrial policy, see Cherif and Hasanov (2019), Ilyina et al. (2024), and Evenett et al. (2024).

¹⁴ Several of these ideas stem from classic works from the '80s and '90s, such as those by Johnson (1982), Chang & Amsden (1994), Amsden & Hikino (1995), and Evans (1996). Meanwhile, others are drawn from recent contributions, such as those by Chang & Andreoni (2020), Juhász et al. (2023), Juhász and Lane (2024), and Mazzucato & Rodrik (2023).

3. It should be co-created with the private sector rather than unilaterally imposed by policymakers. Dialogue with the private sector is essential for policymakers to gain the insights needed to better identify opportunities and understand how companies actually operate. However, industrial policy should remain independent of private sector lobbies to prevent capture by interest groups that ultimately secure rents at the expense of genuine structural transformation and, consequently, the broader society.
4. It should be selective, with clearly defined and focused objectives. If an industrial policy pursues too many goals simultaneously, it is unlikely to achieve them.
5. It should establish clear, enforceable conditions for beneficiary companies, requiring them to meet specific performance goals. The state, in turn, must have the authority and mechanisms to withdraw benefits from companies that fail to meet these goals and to reward those that succeed.
6. It should be structured as a portfolio of projects, similar to how venture capital operates, where a few successful projects can more than compensate for the failures. Therefore, industrial policy should aim to select winning sectors but also recognize when to withdraw if something doesn't work. The worst industrial policies are those in which the state continues to invest resources in poor investments.
7. It should include mechanisms for rigorous cost-benefit impact assessments. Such evaluations are essential for generating institutional learning, enabling policymakers to revise ineffective tools and strengthen those that prove effective.
8. It should be temporary and include clear, enforceable exit mechanisms. The norm should not be the indefinite extension of promotion regimes under the notion of "acquired rights" but rather the effective fulfillment of the established timelines.
9. It should incorporate the environmental dimension, seeking to reduce the environmental impacts of existing productive sectors and promote those that contribute to building a more sustainable productive matrix.
10. It should consider the local political economy. Industrial policymakers should carefully assess how policies align with the domestic political context: who will benefit, who might lose, and what political incentives are needed for the proposed policies to gain support. They should also consider how today's policies could reshape the political economy in the future and which policies are most likely to endure across political cycles.
11. It should be coordinated among institutional leaders from various government sectors. Effective coordination ensures that efforts from areas directly or indirectly involved in industrial policy (such as Production, Economy, Education, Science, Labor, Infrastructure, and Environment) reinforce one another, optimizing resources and enhancing the effectiveness of state action.
12. Industrial policy should be supported by the development of local administrative capacities. The success of such policies largely depends on the bureaucratic capabilities responsible for their design, implementation, and monitoring. When these capacities are weak, implementing sophisticated and ambitious industrial policies becomes impossible, and state action may even worsen existing issues. Therefore, building state capacities for effective policy design, implementation, evaluation, and monitoring is essential. This requires investment in a professional and stable public sector bureaucracy that can engage with the private sector while remaining autonomous in its decision-making.

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