**NOMBRE DEL EVENTO:** Working Party of National Experts on Science and Technology Indicators (NESTI)

**NOMBRE DE QUIEN ELABORA LA FICHA:** Miguel Adolfo Guajardo Mendoza

**Antecedentes**

El NESTI es un grupo de trabajo de gran importancia para discutir temas de indicadores en CTI acorde con los instrumentos metodológicos de la OCDE. En particular, en esta sesión estaba en discusión una nueva versión del Manual de Oslo.

**Posibles temas a tratar en la reunión**

Enlistar los temas que probablemente el solicitante aborde en la reunión. Si se cuenta con la información precisa,ofrecer detalles e información adicional que se tenga. Presentar la información a través de ideas concretas en formato de viñetas

1. Revisión de Manual de Oslo. Los temas a abordar en la revisión del Manual fueron los siguientes:
2. Los temas de discusión de este evento giraron en torno a la plataforma de innovación tecnológica (The Innovation Policy Platform) de la OCDE, los avances del proyecto del triángulo del conocimiento, así como la revisión de políticas de innovación en algunos países miembros de este organismo.
3. Se presentaron los cambios y avances sobre el proyecto The Innovation Policy Platform[[1]](#footnote-1). Esta herramienta contó con algunos cambios en su diseño, como búsquedas personalizadas, acceso a estadísticas por país, entre otros aspectos. Además, a esta plataforma ahora se integrará la información del OECD Technology and Industry Outlook. Algunos de los temas que se discutieron fue la actualización de la información la cual, por su naturaleza, en ocasiones tiene que esperar hasta dos años para ser actualizada.
4. Se tuvieron mesas de discusión para discutir las fortalezas, debilidades, oportunidades y amenazas en los siguientes temas: (1) The future of public Research and Tecnology Organisatios, (2) new technologies in production: economic, environment and policy implications,(3) the future of science policy design and delivery, (4) the future of innovation policy design and delivery y (5) future research careers.
5. Se discutieron algunos avances sobre el proyecto que actualmente implementan algunas delegaciones de la OCDE en el triángulo del conocimiento,[[2]](#footnote-2) el cual se centra principalmente en (1) Las instituciones de educación superior, (2) financiamiento y gobernanza y (3) políticas focalizadas y (4) evaluación de impacto. En todos los puntos anteriores se abordan de manera importante el tema de los indicadores y de la gobernanza. Se discutieron los avances de algunos documentos de investigación que se están elaborando, así como estudios de caso.
6. Se habló sobre la Reunión Ministerial (2015 OECD Ministerial Meeting, World Science & Technology Forum)[[3]](#footnote-3) que se llevará del 19-23 de octubre de este año en Daejeon, Corea, así como su declaración (provisional). Entre los temas de esta declaración se encuentran: STI are major factors of growht and well-being, adapting policies to the digitisation of S&T, strenghtening the monitoring and assessment of research and innovation policies, indicators for assesing the impact of research and innovation policies, STI contribute to sustainable development, sustainable development, health research needs new models, updating international co-operation in S&T, involving developing countries in global knowledge networks, strenghening scientific advice for policy making y the role of the OECD.
7. Se presentaron avances sobre estudios de caso (Chile, Malasia, Luxemburgo) que actualmente está realizando la OCDE en el marco del triángulo del conocimiento. De igual forma, algunos delegados presentaron actualizaciones en sus políticas de innovación.

**Comentarios generales/observaciones**

Valoración del Director Adjunto de la reunión o el evento, recomendaciones y previsiones que habrá que tomar previo a la reunión, alertas, o dudas sobre la pertinencia. Formato libre

**ANEXO**

* **Intervenciones México**

**Point 3. Asessing the impact of public support for business R&D**

*Tema: Microdatos de innovación y ESIDET*

1. In Mexico, the National Institute of Statistics and Geography (INEGI) is the one who provides two forms of access to microdata under a regulatory framework. The first is free download via direct access from their website where the main Survey results are published; the second one is the access through the Microdata Laboratory, where international organizations, experts, researchers and graduate students can get specific information related with the survey.

Microdata files contain the individual statistical data, suitably anonymized, in order to preserve the information confidentiality, especially for Research and Technological Development Survey (Encuesta sobre Investigación y Desarrollo Tecnológico-ESIDET). This survey collects information on Research and Technological Development and Innovation activities, and, in order to protect the companies’ identity that answered the survey has applied confidentiality rules.

The ESIDET survey is biennial and the information available in the Microdata Laboratory is from the 2008-2011 period, the information related to 2012 and 2013 years is about to be delivered. The information on innovation in the ESIDET survey is based in the methodology suggested by the Oslo Manual, in topics about innovative products developed by the company at the global and national or company level; new production techniques, the use of technology and innovation process activities.

*Theme: Public policy background to encourage research in the private sector*

1. In México, the productive sector participates with 25% of R&D expenditure. Strategies to encourage investment in the sector in R&D have been proposed since 1985 through two mechanisms: Tax incentives and financial transfers. In 1999 fiscal stimulus was to implement a 30% tax credit in relation to R&D expenses amount. In 2002 the Law on Science and Technology stimulated the possibility to create sectoral funds to conduct scientific research.

CONACYT has implemented 11 programs from 1995 to 2015. Two of these programs comprise 96% of the expenditure to promote STI activities in private companies: The fiscal stimulus to the Scientific Research and Experimental Development (EFICDE) and the Incentives Program for Innovation (PEI), with approximately 48% of those costs each. The EFICDE was implemented since 2001 and has lasted 7 years, while the second has been discharged during the past 6 years.

We are currently working on redesigning our strategies in favour of private investment escalation but also to increase R&D and innovation activities carry out by the private sector. We look forward to share with you all the updates to these strategies for your feedback.

*Theme: Current strategies to encourage investment in R & D in the private sector*

1. The main strategy to encourage private sector investment in R&D and innovation is the PEI. This program is pointed at all mexican companies that perform STI activities in the country. The objective of the PEI is also encouraging, at national level, business investment in activities and projects related to research, technological development and innovation activities through the granting of complementary incentives, so it can have the greatest possible impact on the competitiveness of the national economy, either individually or in connection with Institutions of Higher Public Sector (national, public or private) and national public research institutes. This program seeks to encourage investment by private companies in R&D and innovation, committing companies to invest a proportion of what is assigned as public support.

Currently this effect, which we have called multiplier, is: for every peso the company receives from the PEI program, the company invests about a peso too.

The National Council for Science and Technology has Funds in which, different government agencies, intend to strengthen infrastructure and raise of innovation and research projects performed by the private sector.

*Theme. Priority research question*

Following the status of information collected we believe that an important question on the policy issue is related to the evaluation of the strategies impact to encourage research in the private sector of our country. This requires recognizing not only economically but in terms of productivity impact. So the priority question may be what is the effect of economic

transfers and fiscal stimulus spending? And what is the effect of economic transfers and fiscal stimulus in the innovative output (patents and intellectual property rights for example)?

Answering this question requires more complex impact assessment methodologies and experimental methods, which require information to have available a control population to know the effect on the population that did receive the benefit. However, the number of available data sometimes does not allow analyse the information from the control population and sometimes is not possible to select a group with these characteristics for its evaluation.

This is the situation in most of our programs. So we are analysing the proposal for evaluation by building control groups obtained from other data sources such as companies reached by the ESIDET survey.

**3 to 4 December 3rd revision of the Oslo Manual**

*2. Perspectives form innovation surveys around the world - main Challenges and Opportunities*

1. Survey Research and Technological Development (ESIDET) is the survey which collects information on Research and Technological Development and Innovation. ESIDET resumed the methodology suggested by the Oslo Manual to apply in topics such as innovative products developed by the company at the global, national and company level; investigates new production techniques, the use of technology and innovation activities.

We are currently working on the redesign of the survey, still, have to work at it to register not only products and processes but organizational and marketing innovation spending, we want to make more robust the sampling design, to modify the response options by years and not by periods so we can collect data annually.

To ensure the capture about marketing, organization innovation requires a discussion in international guidelines.

1. Se recomienda revisar los sitios <https://www.innovationpolicyplatform.org/> y <http://www.oecd.org/sti/outlook/e-outlook/> [↑](#footnote-ref-1)
2. El objetivo de este proyecto es generar información para asesorar a los tomadores de decisiones, para mejorar la integración y vinculación entre la investigación, la innovación y la educación, y lograr con ello el desarrollo regional y nacional de las economías. [↑](#footnote-ref-2)
3. Se recomienda visitar el sitio web del evento: <http://www.daejeon-oecd2015.org/program/main_event.do> [↑](#footnote-ref-3)