From Reactive to Proactive: Greening Germany's Regional Policy

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Introduction

Germany's economic engine is sputtering – and the warning lights are flashing. Deep-seated shifts are reshaping the very foundations of its manufacturing strength. Domestic demand and exports have stagnated for more than five years, and key industrial sectors are bearing the brunt. Reports of factories cutting jobs at home are mounting. While overall industrial employment remains above the 2010s average, job losses – particularly in North Rhine-Westphalia, Baden-Württemberg, and Bavaria – are real. The evidence suggests these cuts are not simply the product of cyclical downturns, but the result of structural weaknesses and profound changes in the global economic landscape - with the climate crisis and the efforts to curb it among the most powerful forces driving this transformation.

Although Germany has significantly reduced its CO_2 emissions in recent years, the country is unlikely to meet its self-imposed climate targets if current trends continue. Ongoing regulatory uncertainties – in sectors such as transport and buildings – are making households and businesses hesitant to invest, slowing the pace of the green transition. Germany's Council of Experts on Climate Change has also criticized current climate policy for paying too little attention to low- and middle-income groups. If left unaddressed in these uncertain times, this oversight could not only hamper economic progress but also seriously undermine social cohesion, a risk made more pressing by Germany's already pronounced regional disparities.

Germany is already far from meeting its constitutional mandate of ensuring equivalent living conditions across the country. Regional disparities – whether in per capita income, unemployment rates, or public infrastructure – remain stark (Gohla und Hennicke 2023, SVR 2025). Without comprehensive regional policies to support the transition to climate neutrality, Germany faces the risk of increasingly widening inequalities. This is because local factors, such as existing industrial specializations, shape both the starting point and trajectory of transformation. Ergo, the push for decarbonization will not impact all German regions equally.

Ignoring these regional differences could undermining both economic outcomes and public support for climate policies, as the actual and anticipated effects of the green transition may trigger political and social grievances—grievances that can carry electoral consequences. Populist parties have been shown to benefit from such growing disparities, and early empirical evidence from Germany suggest that far-right populist parties with climate-skeptic positions are already gaining support in areas facing disproportionate transformation pressures. Recent scholarship has increasingly positioned the green transition—and, with it, the long-term phasing-out of brown jobs—as a key emerging factor behind the rise of right-wing populism. Support for these parties tends to surge in response to structural disruptions and economic shocks. (Heddesheimer, Hilbig and Voeten 2024).

That's why an effective climate and transformation policy must adopt a spatially sensitive approach. While they have likely always existed in some form, place-based policies have, in recent years, gained renewed attention, particularly among OECD countries. Policymakers are increasingly seeking to leverage their potential to address contemporary challenges, including regional inequality, asymmetric shocks, and major transitions such as climate change and its mitigation. (Südekum 2023; OECD 2025).

While Germany's federal system has long embraced place-based policies, these efforts have primarily been reactive — kicking in only when a region's economic indicators fall significantly below the national average or when it faces severe structural disruptions. They are typically aimed at stabilizing local economies and preventing further decline. Economically weaker areas receive funding, while stronger regions effectively subsidize them through taxation. (Südekum 2023).

As the green transition advances, however, even regions with currently above-average economic performance will come under increasing pressure. Neither policymakers nor society at large has any interest in seeing today's donor regions become tomorrow's recipients. Waiting until local labor markets deteriorate before taking action is not only economically unwise—it also risks political destabilization. Instead, priority should be given to identifying regions likely to face acute challenges in their ongoing or upcoming transformation processes. Supporting these regions early and decisively—so they can sustain their economic vitality—not only reduces long-term costs but also strengthens public support for decarbonization.

In light of these risks, this policy brief proposes reforming Germany's regional policy along proactive lines, focusing on reorienting its central instrument for regional economic development: the Joint Task for Improving Regional Economic Structures (GRW). It begins by identifying the regions most exposed to pressures from the transition to a climate-neutral economy and by assessing the political risks of maintaining a reactive policy stance.

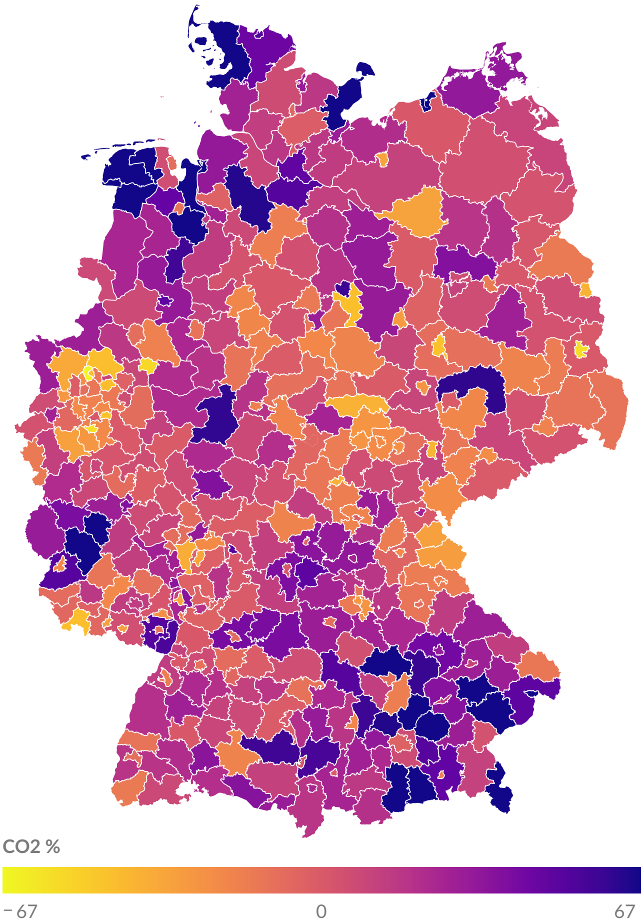
The push for decarbonization will hit German regions with varying intensity

A thorough analysis is needed to identify which German regions are likely to be hit hardest by the transition to a climate-neutral economy. Such an analysis draws on early empirical studies showing that prevailing patterns of industrial specialization, along with other local factors, play a key role in shaping both the starting point and trajectory of regional transitions (Südekum and Posch 2024; Südekum and Rademacher 2024; Maucorps et al. 2022).

Over the past two decades, aggregate absoulte CO_2 emissions from firms outside the energy sector in Germany have remained relatively stable, despite significant economic expansion. However, at the sectoral level, emissions trajectories diverge markedly. Between 2000 and 2019, many sectors exhibited a clear decline in CO_2 emissions per employee. Nonetheless, Südekum and Rademacher (2024) also identify sectors with increasing emissions intensity—notably shipping and aviation, paper and cardboard manufacturing, and metal production and processing.

These differing sectoral emission trends are reflected in the CO2profiles of individual districts, depending on local patterns of industrial specialization (see Figure 1a). On average, there is a positive correlation between regional emissions and economic growth: in regions such as the Ruhr area, Lusatia and Saarland, CO_2 emissions have fallen, in parallel with economic decline

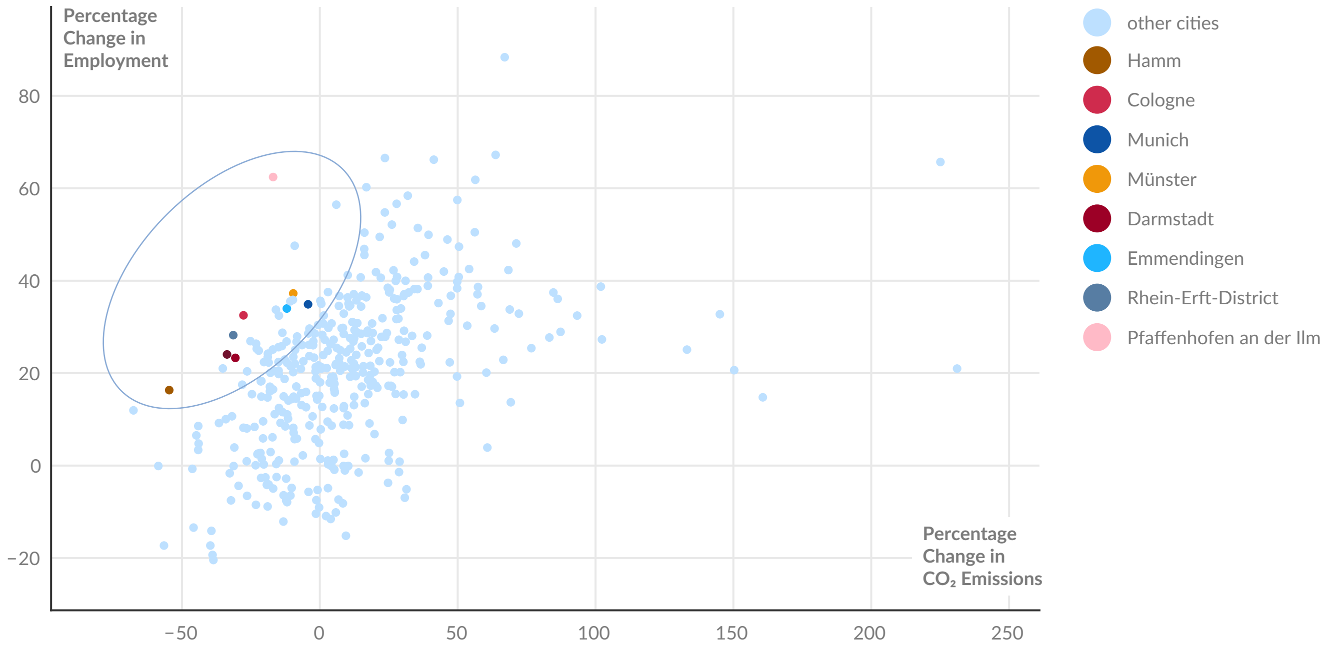
FIGURE 1a **Change in CO2intensity between 2000 and 2019**



Source: Südekum und Rademacher 2024 | BertelsmannStiftung

Conversely, higher regional economic growth generally went hand in hand with stronger emissions growth (see Figure 1b). However, some outlier regions – such as Cologne, Munich, Münster, Hamm, Darmstadt, Emmendingen and Rhein-Erft-Kreis – demonstrate that decoupling is indeed possible. In these places, job losses in emissions-intensive industries were more than offset by employment growth in less carbon-intensive service sectors. In other words, these regions combined strong economic growth with declining emissions – decarbonization was achieved through deindustrialization (Südekum and Rademacher 2024)

FIGURE 1b **Regional employment and emissions growth between 2000 and 2019**



Source: Südekum und Rademacher 2024

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Economic restructuring will demand a monumental effort across German regions

While this strategy may be feasible in some regions, it cannot be justified for the economy as a whole – neither on climate grounds nor from an economic perspective. Decarbonization through deindustrialization would effectively shut down Germany's most important innovation engine, which currently accounts for nearly a quarter of total gross value added and employs more than 7.5 million people. At the same time, the climate benefits would be limited. Most likely, emissions-intensive production would simply move abroad (– a phenomenon known as carbon leakage –) doing little to reduce global emissions (Leipprand et al. 2025).

A successful transition policy must achieve decarbonization while preserving, or even expanding, the industrial base. This requires investments that drive the shift from "brown" to "green" technologies. Initially, these investments mainly replace existing capital stock rather than expanding it, so the immediate growth effects remain modest. Over the medium term, however, these effects can materialize as "green" business models – helped along by rising CO2prices – begin to operate with lower operating costs. To safeguard industrial value creation during this critical transition, industrial policy support for this investment push is essential. The ulitmate goal is the widespread adoption of green technologies.

Put simply, Germany faces the monumental task of rebuilding its industrial sector while keeping it running. Current evidence suggests that this transformation won't happen on its own – it will require a major collective effort. The key question now is: Where in Germany will these challenges be the most significant?

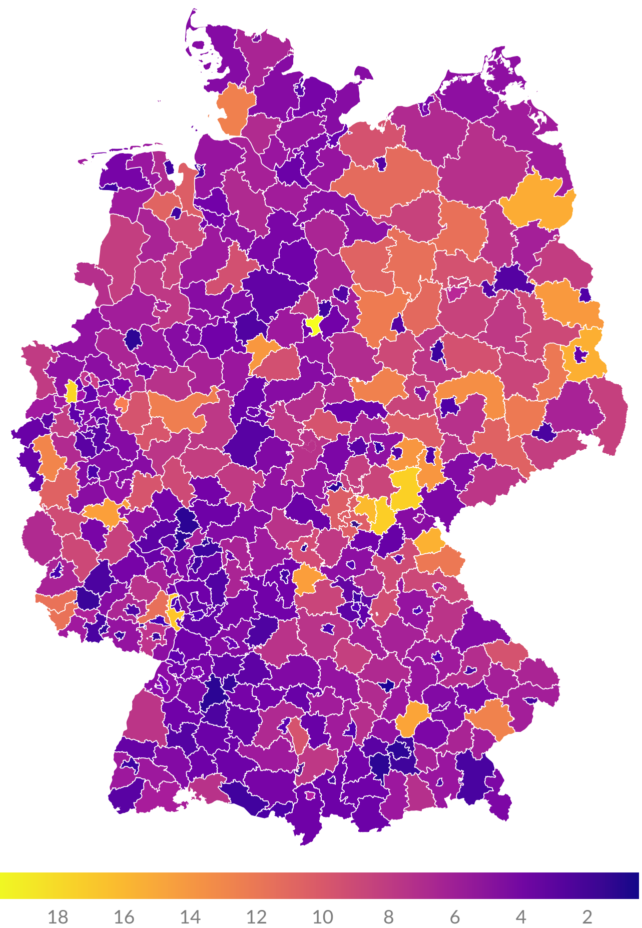
Where action is likely needed most in Germany

Figure 2 offers a clue. The regions marked in yellow have particularly high employment shares in industries where emissions intensity per job has - contrary to the national average - not decreased since 2000, but has instead risen significantly above the average. In these "problem sectors," efforts to decouple production from emissions have so far fallen short. However, if these economic sectors are to remain the core of the region's value creation, this sectoral "transformation stress" will translate into regional "transformation stress."

Regions facing the greatest transformation stress include Freising, Hochsauerlandkreis, Wolfsburg, Tirschenreuth, Duisburg and Rhein-Pfalz-Kreis. However, southeastern Bavaria's so-called chemical triangle, the south of Thuringia, and the south of Baden-Württemberg are also under high adaptation pressure due to their existing regional specialization patterns.

As the transition progresses, these cities and districts are likely to draw special attention because they face the greatest investment needs for technology shifts. Yet the challenges go well beyond purely economic factors.

FIGURE 2 **Regional transformation stress**



Source: Südekum und Rademacher 2024

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Transformation stress fuels populism

High levels of economic transformation stress, if not addressed by targeted regional policy support, can undermine social cohesion and exacerbate social and political tensions. This is particularly true when actual job losses, and the associated economic hardship—as well as a widespread sense of "losing out" in the evolving economic landscape—are likely to be heavily concentrated in specific areas (Dijkstra, Poelman and Rodríguez-Pose 2020; Doukas et al. 2020). Such dynamics, whether grounded in present realities or in expectations of relative decline, are critical in shaping the extent to which populations are willing to support the broader process of transformation (Rodríguez-Pose and Bartalucci 2023). This is especially pertinent in the case of the green transition, which—unlike globalization or automation shocks—is a deliberately planned process with a pronounced normative dimension in political discourse (Heddesheimer, Hilbig, and Voeten 2024).

Recent studies have shown that (far-right) populist parties—particularly those skeptical of climate action—can, inter alia, leverage transformation pressures by mobilizing narratives of social stigmatization and perceived lower social status among communities most affected by the green transition (Colantone et al. 2022; Kim and Yang 2021; Voeten 2024).

For Germany, there is already initial empirical evidence for this: the higher the share of emissions-intensive employment in a district in 2013, the greater the vote gains for the AfD in the 2017 and 2021 federal elections. Heddesheimer, Hilbig and Voeten (2024) also build on the concept of transformation stress from Figure 2, finding a positive correlation with increased AfD support. As Bergmann, Diermeier, and Kempermann (2025) demonstrate, this trend is likely to have continued in the most recent federal election at the end of February 2025. The AfD was able to expand its electoral gains particularly in those regions where the future of substantial industrial employment is uncertain due to decarbonization—so-called looming-decline regions.

What proactive regional policy can do about it

Localized economic insecurity, perceptions of relative deprivation, and experiences of social stigmatization have been identified as important drivers of populist support (Heddesheimer, Hilbig, and Voeten 2024; Kurer and Staalduinen 2022; Schraff and Pontusson 2023). Empirical evidence, however, shows that place-based policies that create new job opportunities, increase wages, and strengthen local infrastructure can help curb the rise of populist movements (Crescenzi, Di Cataldo, and Giua 2020; Albanese, Barone, and De Blasio 2022; Rodríguez-Pose and Bartalucci 2023; Gold and Lehr 2024, Heddesheimer, Hilbig und Wiedemann 2024).

With regard to the physical and transitional risks of the climate crisis, one might therefore argue that investments in regional economies and local infrastructure, as well as tailor-made measures for those most affected, can help cushion the impacts of future economic shocks—whether stemming directly from the climate crisis or from efforts to address it. Such measures would not only better prepare local economies for climate-neutral production but also mitigate political resistance to the transformation. In short, proactive regional policy can play a central role in ensuring the broader success of transformation efforts.

Proactive regional policy to ease transformation stress: Reforming the GRW

In its coalition agreement (CDU, CSU and SPD 2025: 28 ff.), Germany's recently formed federal government has explicitly reaffirmed its commitment to climate goals, emphasizing that decarbonization must be achieved while preserving the industrial base. The coalition agreement (ibid.: 12) also underscores the importance of regional policy and pledges a reform to better allocate funding across regions based on "socioeconomic indicators."

This announcement specifically concerns the central instrument of regional policy in Germany – the Joint Task for Improving Regional Economic Structures (GRW), which is jointly managed by the federal and state governments. It also has implications for the Gesamtdeutsches Fördersystem (GFS),), a comprehensive framework of funding and policy measures designed to promote balanced regional development across Germany. The framework includes about 20 other regionally oriented funding programs that often follow the GRW's allocation criteria.

Introduced in 1969, the GRW is Germany's largest and most important regional investment support program. It funds commercial investments as well as investments in municipal infrastructure, and it also supports projects that strengthen regional ecosystems. Guided by the constitutional mandate to create "equivalent living conditions" in all regions, the program has been continuously adjusted over the decades, with its last major reform taking place in 2022.

The new coalition's explicit commitment to the GRW is particularly welcome. It has a well-established administrative framework and, unlike many other programs, it permits direct investment cost grants for businesses within the scope of EU state aid rules. This feature is especially critical for a successful transformation policy, as it heavily depends on private investment.

However, the coalition agreement's pledge to reform the GRW leaves open which specific socioeconomic indicators will guide future funding allocations. It also does not explicitly link regional policy with climate policy, even though such a connection already exists. This stems from a fundamental change in the GRW's objectives made during the 2022 adjustment – hailed by the previous federal government as "the biggest reform of the GRW in over fifty years" (BMWK 2023a). Until then, the main aim of the GRW was to promote job creation in eligible regions by providing investment cost grants. Since the reform, supporting emissions reduction has been elevated to an equally important goal. Regional policy is now explicitly intended to help Germany achieve its climate targets.

This reform has already had some tangible effects on funding practice. For example, the previous government clarified (see BMWK 2023b) that, going forward, the GRW would prioritize investments in structurally weak regions that are strategically important for the transition to a climate-neutral economy. In practice, this includes key components such as solar panels, battery cells, wind turbines, heat pumps and electrolyzers – technologies that can foster value creation and skilled jobs in renewable energy, thereby unlocking local economic potential.

So far, however, this new dual focus in the GRW's objectives has not been reflected in a fundamental reorientation of funding logic. Regional policy in Germany remains reactive: A region only becomes eligible for GRW funding if its economic indicators (currently including GDP per employee, underemployment rate, demographic trends and an infrastructure indicator; see BMWK 2021 or Alm and Weyh 2025) fall far enough behind the national average.

Put simply, regional policy kicks in only when "the child has already fallen into the well." Its goal then is to stabilize local structures, compensate for deficits and counter further economic or social decline (Südekum 2022).

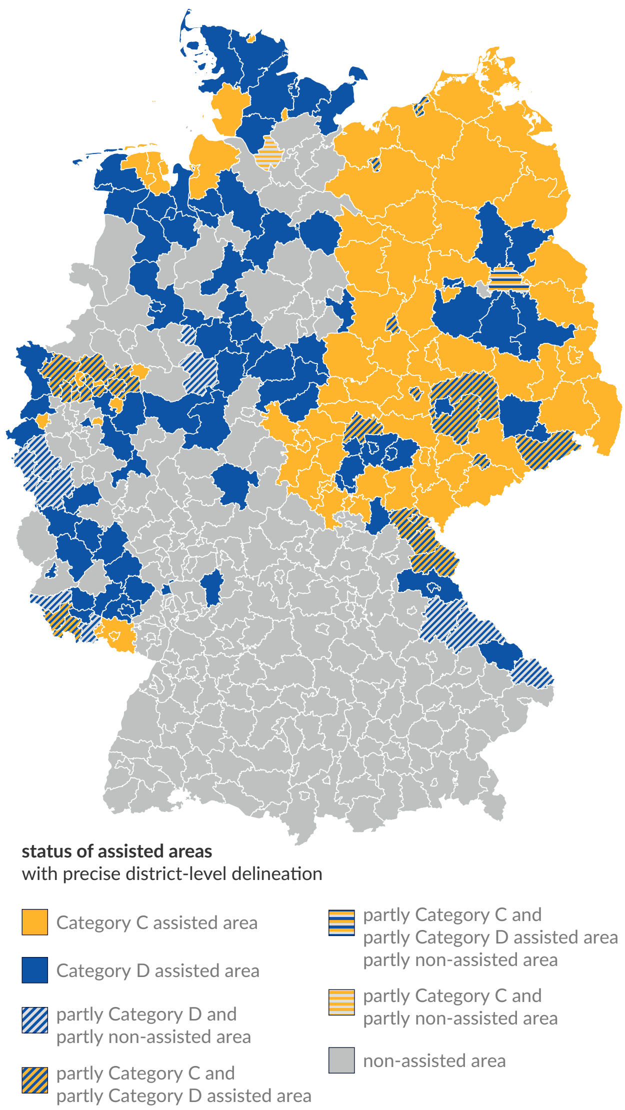
In the context of the green transition, however, this reactive approach falls short. Neither policymakers nor society can be content to support regions only once they have already become recipients rather than contributors in fiscal equalization systems. The focus should instead be on proactively helping all regions – including those currently performing strongly – maintain and expand their economic strength throughout the process of transformation.

Changing and expanding the scope of eligible regions

Despite the shift in the GRW's objectives, the actual map of eligible funding regions has not yet been updated. For the funding period through 2027, the scheme shown in Figure 3, which is aligned with the European Union's cohesion policy, remains in place. Under this system, the highest investment cost grants are paid in so-called Category C funding areas, which are almost entirely in eastern Germany – historically the areas most affected by labor market challenges.

In short, the GRW's new goal – supporting decarbonization – has so far been scarcely reflected in actual funding practice. This is evident, among other things,

FIGURE 3 **GRW assisted area map 2022–2027**



Source: BMWK

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in the fact that there is virtually no correlation with the transformation stress indicator shown in Figure 2.

Many of the regions that, according to our analysis, will be most heavily affected by the challenges of decarbonization fall entirely outside the current map of eligible areas and are thus excluded from GRW funding and the related GFS programs.

This situation points to two fundamental reform tasks for the new federal government, which should preserve the GRW as the central tool of regional policy:

1. A reorientation of the funding logic – moving away from a purely reactive model toward a more proactive approach.

2. A redefinition of the map of eligible funding areas to better reflect the revised GRW goals and leave room for a proactive policy approach.

To ensure that a fundamentally revised funding logic and an updated funding map are in place by the start of the new funding period in 2028, the reform process should be launched promptly. At the core of this effort should be an expansion of the current four indicators used to define funding categories to include additional elements that adequately capture the expected transformation stress in each city and district.

This adjustment of the indicators should not be done on an ad hoc basis. Instead, it should be grounded in solid empirical research and aim to operationalize the constitutional goal of regional policy – creating equivalent living conditions – as realistically as possible. The stronger the empirical foundation, the greater the social and political acceptance will be – and the more effectively policymakers can navigate the political economy of the process.

Any changes to the funding map will inevitably face political resistance, particularly in regions that might see their funding priority downgraded. A more transformation-oriented, proactive deployment of funds in currently economically strong regions could also mean that less funding goes to traditional GRW recipient regions overall. This distributional challenge could be at least partially offset by increasing the overall funding available to the GRW. The coalition agreement (CDU, CSU and SPD 2025: 12) states that the GRW's "financial resources will be maintained at a high level." However, the GRW's total annual funding currently amounts to only around €2 billion – split equally between the federal and state governments. As a standalone tool, it will therefore not be enough to meet the task at hand.

Instead, it will be essential to embed the economic policy support for the transformation – across its many spatial dimensions – beyond the boundaries of classic regional policy.

Beyond regional policy: Coalition agreement sets the stage for investment

Germany's 21st legislative period began with a dramatic move even before the new government officially took office: The debt brake was reformed, and a special fund totaling €500 billion was written into the constitution. Under this arrangement, the federal government will allocate €300 billion over the next 12 years for additional infrastructure investment. Another €100 billion will be transferred to the states for municipal investments, while the final €100 billion will be channeled into the Climate and Transformation Fund (KTF) to help meet climate targets by 2045.

The new government also agreed on key principles for its economic and fiscal policy in the coalition agreement. For the first three years of the legislative term, improved depreciation rules will apply to encourage private investment. After that, the government plans to begin a corporate tax reform, gradually lowering corporate tax rates and offering additional relief on income taxes.

A so-called Germany Fund will provide further investment stimulus by taking equity stakes in private-sector projects – structured to comply with the debt brake as a financial transaction outside the core budget. This could include venture capital for start-ups, the expansion of (energy) infrastructure via public-private partnerships, or government stakes in commercially viable private investments.

The specific design of these policies remains to be seen. Greater clarity is expected with the 2025 federal budget, financial planning through 2029 and the special fund's economic plan. Core budget initiatives – such as the planned tax cuts – are especially constrained by limited fiscal space, which remains tight due to weak economic growth.

Even so, it is already clear that boosting both public and private investment will be a central priority for the new government. Beyond increased funding, this push will also rely on complementary structural reforms – such as reducing bureaucratic hurdles and speeding up planning and permitting procedures – to ensure faster and more targeted spending.

Recent simulation studies suggest this goal is within reach. The German Economic Institute (IW 2025) concludes that this fiscal-cum-reform package could spark an investment boom in Germany. According to model calculations, annual investments of €50 billion sustained over a decade could lift real total investment by almost 7% by 2034. Other studies have reached similar conclusions.

This surge in investment is likely to coincide with a shift toward new technologies, helping to lower the emissions intensity of production. Depending on how policies are ultimately designed, these efforts could also address the unevenly distributed transformation stress across Germany's regions – through both direct and indirect channels.

Shaping the investment agenda with indirect regional effects

Our analysis began with sector-specific emissions dynamics. Regional transformation stress arises when troubled industries are heavily concentrated in certain areas and lag in decoupling production from emissions. Solving this regional challenge requires first addressing it at the sectoral level: developing and widely deploying new technologies to decarbonize production within these industries. As explained above, the private investments needed for this must first be supported and guided through (industrial) policy. Only then does the genuinely regional dimension come into play – namely, ensuring that these technological innovations diffuse broadly across regions, reaching smaller towns and small and medium-sized enterprises (SMEs) as well.

Put another way, the economic policy support for the transformation is not limited to direct regional policy in the narrow sense (as represented by the GRW). It also encompasses a broader investment-driven industrial policy that is spatially aware and has indirect regional effects.

The investment agenda of the new federal government (the fiscal-cum-reform package) mainly addresses this indirect channel. Its aim is to promote private investment and the development and adoption of new technologies. The tools being deployed for this purpose are spatially neutral and available across the entire country. This applies to improved depreciation rules and tax incentives, as well as the planned structural reforms and the Germany Fund. The same spatial neutrality applies to potential additional measures that might be financed through the KTF portion of the special fund. For example, there are current discussions about introducing a subsidized industrial electricity price to boost electrification in emissions-intensive industries. Similarly, specific purchase incentives for electric vehicles are under discussion to accelerate decarbonization in private transport. Both initiatives are likely to reduce emissions in the industrial and transport sectors and make it more likely that Germany will meet its 2045 climate targets. As such, KTF funding would be a logical fit. Both initiatives would be deployed nationwide without spatial differentiation. However, they would still indirectly ease regional transformation stress because firms in emissions-intensive sectors would take advantage of the tax incentives and ramp up private investment in response.

Regional allocation of the special fund and direct spatial impacts

Beyond these indirect effects, there is also the question of how the special fund will be directly allocated across Germany's regions. A major share of the funding is earmarked for additional infrastructure investment, especially from the federal share of €300 billion. However, the federal government is directly responsible only for certain types of infrastructure – such as the German rail system, federal highways and large-scale transmission networks.

In practice, this means that spending decisions will always involve regional and temporal prioritization: How much money flows where, and when. The same distributional question arises for the €100 billion allocated to the states. In principle, this money is meant to be passed on to municipalities for investments – such as schools, daycare centers and public buildings. Here, too, the regional allocation within and among states will need to be worked out politically.

One possible solution is the so-called Königstein Key, already used in various other contexts. Under this formula, investment budgets would be distributed across regions based on two metrics: tax revenue (weighted at two-thirds) and population (weighted at one-third).

Other allocation formulas are also conceivable. For instance, the reformed GRW funding map – or specific subcategories within it – could be considered when allocating the special fund.

The special fund was established in response to Germany's inadequate infrastructure and the widely recognized need for investment. Supporting structurally weak regions was not a primary driver in this context. Therefore, relying solely on the GRW map to allocate the special fund would likely be inappropriate. At the same time, there is strong empirical evidence (e.g., DIW 2015) showing that infrastructure in structurally weak regions is in worse condition and requires greater investment. A blended approach – drawing on both the GRW map and the Königstein Key – could therefore be justified. This would mirror the logic of the GFS, where GRW priority regions receive additional attention

Another approach worth discussing would be to incorporate the regional transformation stress indicator (see Figure 2) into the allocating formula. This would give the indicator a direct role in determining how the special fund's investment budget is distributed – beyond its application in the GRW reform process (see above).

Overall, this would create an investment-driven, regionally tailored industrial policy that proactively supports those regions likely to face the greatest challenges in the transformation ahead.

Conclusion

- The transition to a climate-neutral economy will be a major undertaking for Germany's cities and municipalities. The expected transformation stress will be very unevenly distributed across regions. It will be especially acute in industrial areas with high concentrations of greenhouse gas-intensive jobs, where production has yet to decouple from emissions.

- Beyond the economic impacts, this concentrated transformation stress also risks eroding social cohesion and fueling social and political tensions. Far-right populist parties that take climate-skeptical positions could become the beneficiaries of this uneven pressure. Initial empirical studies in Germany support this concern.

- An investment-driven, proactive industrial policy is essential to accompany the green transition economically. The aim must be to develop and deploy climate-neutral technologies widely. This means decoupling production from emissions – achieving decarbonization while preserving (or even expanding) value creation. In designing these measures, it is crucial to adopt a "regional lens."

- Many tools of a proactive industrial policy can be spatially neutral and applied nationwide, such as tax incentives to spur private investment. These work indirectly on the regional level.

- At the same time, traditional regional policy has a key role to play – particularly when it comes to maintaining social support for decarbonization. Since its last revision, the GRW has also been intended to contribute to climate goals. However, its current funding logic and the map of eligible areas do not fully align with this expanded mission.

- A reform of the GRW is needed: It must become more proactive and step in before a crisis is already at hand. The expected regional transformation stress should be anchored as a forward-looking criterion in the GRW allocation formula. This indicator could also be directly used to guide how the new special fund's investment budget is regionally allocated. Taken together, this would create an investment-driven, regionally targeted industrial policy that proactively supports the regions expected to face the greatest challenges in the course of transformation.

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