Knut Niemann

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Education

Ph.D. in Economics, University of Tübingen Overall grade: *summa cum laude*	10/2019 – 12/2023
M.Sc. in Economics and Finance, University of Tübingen	10/2017 – 09/2019
B.Sc. in Economics and Business Administration, University of Tübingen	10/2012 – 09/2016

Fields of Interest

International economics, expectation formation, political economy

Academic and Research Positions

Research Consultant, Danmarks Nationalbank, Copenhagen	06/2026 – present
Postdoctoral Researcher, Prof. Dr. Anna Gumpert, University of Tübingen	10/2023 – present
Doctoral Student, Prof. Dr. Gernot Müller, University of Tübingen	10/2019 – 06/2023

External Experience and Stays Abroad

Visiting Researcher, Danmarks Nationalbank, Copenhagen	04/2026 – 05/2026
Intern Directorate General Economics, Bundesbank, Frankfurt	05/2022 – 09/2022
Research Intern, Institute for Applied Economic Research (IAW), Tübingen	03/2016 – 06/2016
Visiting Student, University of Massachusetts, Amherst	09/2014 – 05/2015

Job Market Paper

Political Distance and Trade, latest version
Single-authored

Using UN General Assembly voting disagreement and structural gravity for 167 countries over 1966–2020, I study how trade responsiveness to political distance varies across geopolitical environments. An increase equal to the mean within-pair standard deviation is associated with about 3 percent lower trade. Delayed rather than anticipatory responses support a causal interpretation. In the unrestricted sample, responsiveness peaks in the late Cold War, is weak and insignificant during 1995–2007, and recovers partially by 2016–2020. Under a trade-cost interpretation, imposing 1962 political distances on the 2020 economy brings some partners closer and pushes others apart. With 2016–2020 responsiveness, the unweighted mean welfare loss is 0.55 percent; about 70 percent of economies lose, while the Americas gain on average. Holding the baseline economy, realignment, trade elasticity, and estimation specification fixed, late-Cold-War responsiveness raises the mean loss by about 40 percent.

An earlier version was discussed in the IRC report "The EUs Open Strategic Autonomy from a central banking perspective."

Publications

Firm expectations about production and prices: Facts, determinants, and effects, pub. version
with Benjamin Born, Zeno Enders, and Gernot Müller, in: Rüdiger Bachmann, Giorgio Topa, and Wilbert van der Klaauw, eds., **Handbook of Economic Expectations**, Elsevier, 2023, pp. 355–383.

Working Papers

Firm Expectations and News: Micro v Macro, latest version
with Benjamin Born, Zeno Enders, Manuel Menkhoff, and Gernot Müller
Revise & Resubmit at **American Economic Journal: Macroeconomics**
CEPR Discussion Paper; VoxEU column

Using German and Italian firm surveys, we relate forecast errors to expectation revisions and find overreaction to firm-specific news but underreaction to aggregate news. A model of "island illusion," in which firms underestimate the importance of aggregate developments for their own performance, explains both patterns. Embedding this mechanism in a noisy-information model shows how these expectation errors affect aggregate outcomes.

Political Shocks, Interstate Migration, and Geographic Polarization, latest version
with Jonas Adolph

Using county-to-county migration flows around 45 close US gubernatorial elections (1994–2014), we estimate stacked event studies. Outmigration from losing-party counties rises by 3.21 percent over five years, especially when candidates have larger ideological gaps. Conditional on total departures and destination shocks, migration shifts by 4.02 percent towards strongholds of the losing party relative to winner-party strongholds. A migration-selection model and gravity evidence connect these responses to geographic political sorting.

Work in progress

Tariffs and Danish Exports: Insights from Three Decades of Microdata,
with Henrik Yde Andersen, Mathias Klein, and Thomas Krause
Slides

Using Danish customs records, firm balance sheets, and destination-specific tariffs for 1993–2021, we estimate local projections comparing a firm's exports of the same product across destinations. Preliminary results suggest that higher tariffs reduce export quantities and unit values, consistent with exporters absorbing part of the increase. We examine employment, investment, and destination diversification, with initial evidence of limited domestic adjustment and possible expansion into additional markets.

Presentations

2026 EEA-ESEM Meeting (Dublin);
European Trade Study Group (ETSG; University of Exeter);
XXVII Conference on International Economics (Ciudad Real; 2 papers); Danmarks Nationalbank

2025 RWTH Aachen; RSIT Brown Bag (Tübingen); Macro Brown Bag (Tübingen)

2024 Tübingen-Hohenheim-Economics Workshop (Discussant); Macro Brown Bag (Tübingen)

2023 Macro Brown Bag (Tübingen, twice)

2022 Bundesbank internal seminars; BoE-BdF-BBk-ECB Global Economy Meeting (Eltville); Dynare Conference (Lancaster); DFG Priority Programme 1859 online seminar

Grants and Awards

2026 Conference travel support, Friedrich-List-Stiftung (EUR 1,058.94), for the XXVII Conference on International Economics, Ciudad Real, Spain

Teaching Experience

International Trade Theory (Lecture + Tutorial Coordination, Master) 2024–2026
Evaluations: 1.2 (Summer 2025), 1.5 (Summer 2026)

Master Seminar: Globalization, Digitalization, and Firm Behavior (co-taught) 2024–2026
Evaluations: 1.1 (Winter 2025/26)

Master Thesis Supervision (8 submitted) 2024–2026

Firms in the Global Economy (Lecture + Tutorial, Bachelor) 2023–present
Evaluations: 1.3 (Winter 2024/25), 1.1 (Winter 2025/26)

Bachelor Tutorials 2016–2022
Macroeconomics I (3x), Exploratory Data Analysis, Probability and Risk, Quantitative Methods, Intermediate Microeconomics

Evaluations report instructor grades. Scale: 1 = best, 5 = worst.

Refereeing

Economics Letters, European Economic Review

Additional Information

Languages: German (native), English (fluent), Italian (basic), French (basic)

Research software and tools: Stata, MATLAB, R, LaTeX

Service: Board Member and Treasurer of SSC Tübingen e.V. since 2017 (responsible for the finances of a multi-sport club with more than 1,000 members)

References

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