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Economics

OECD Economic Surveys: Mexico 2024

After a slow recovery from the pandemic, the Mexican economy has navigated well the global environment of tightening financial conditions and heightened uncertainty. Fiscal policy has a robust track record in attaining fiscal targets and keeping public debt low. Higher tax revenues would allow to maintain fiscal prudence and to address important spending needs in productivity enhancing areas, such as education, infrastructure, the digital and green transitions, and the fight against corruption and crime. Mexico has large potential to attract investment from companies looking to relocate their operations to North America. This is also a significant opportunity to spread the benefits of trade throughout the country and to create more and better value chain linkages. Fully harnessing these opportunities will require addressing long-standing challenges related to transport and digital connectivity, regulations or the rule of law, and shifting to renewables. Improving education outcomes and reducing gender gaps and informality would help to continue the recent fall in income inequality, while also strengthening the country's growth potential. Improving access to adequate housing and more coordination across, urban, housing and transport infrastructure policies would enhance Mexicans' living conditions, reduce urban sprawl and improve urban mobility.

SPECIAL FEATURE: IMPROVING HOUSING AND URBAN DEVELOPMENT POLICIES

OECD Economic Surveys: Egypt 2024

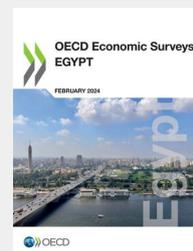
Growth has held up better in Egypt than in neighbouring countries but inflation has reached record highs and financing conditions have tightened along with foreign currency shortages. In this context, Egypt is stepping up economic reform efforts. The exchange rate needs to become more flexible and monetary policy adjusted as required to bring inflation down to target. High public debt makes Egypt more vulnerable to external shocks. Committing to a credible consolidation strategy is key to restore public finance health, which would improve investor confidence and thereby reduce debt servicing costs. While expanding cash transfers to the most vulnerable, broad-based energy subsidies should be phased out, which would also reduce emissions. As public investment has expanded substantially, further efforts to rationalise large-scale construction projects should be pursued, while allocating resources to green investment. To revive private sector growth, the regulatory burden and the state footprint ought to be reduced, and ongoing reforms including the divestment plan should be implemented fully and effectively. As the working-age population will expand with a rising education level, younger generations need to be better integrated into the labour market. This requires reducing labour taxation, enhancing public employment support and better aligning skills to labour market needs.

SPECIAL FEATURES: IMPROVING THE BUSINESS CLIMATE TO REVIVE PRIVATE SECTOR GROWTH; PROMOTING BETTER-QUALITY JOB CREATION FOR INCLUSIVE GROWTH



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Economics

OECD Handbook on the Compilation of Household Distributional Results on Income, Consumption and Saving in Line with National Accounts Totals

This publication presents guidance for the compilation of distributional results on household income, consumption and saving consistent with national accounts totals. These results are a key input for evidence-based policies targeting inequality and fostering inclusive growth, providing insights into key dimensions of material well-being across household groups. The results complement existing inequality measures by including elements that are often lacking from micro statistics and by providing inequality measures consistent with macroeconomic aggregates, broadening the scope for analyses, while also capturing households and transactions that are typically underrepresented in micro data. Moreover, while the estimates do require a number of statistical choices and assumptions, they have a high degree of international comparability because of the common methodology and their alignment to national accounts results. The handbook provides an overview of the conceptual framework underlying the distributional results and discusses various aspects in relation to the compilation and presentation of the distributional results. It aims to assist compilers in deriving high-quality distributional results and to provide users with more insights into the main benefits of these results as well as into the way that the results have been derived.

Finance and Investment

The Role of Guidelines in Fostering Competition Policy in Tunisia

This report builds on the recommendations of the 2022 OECD Peer Review of Competition Law and Policy in Tunisia. It presents an overview of how to develop competition law guidelines across four areas (merger control, pecuniary penalties, leniency programmes and compliance programmes) and includes a comparative analysis of selected jurisdictions, with the view of assisting Tunisian authorities to develop their own guidelines. While competition guidelines can play an important role in fostering competition policy in Tunisia, it should go hand in hand with addressing specific shortcomings in the enforcement and advocacy framework as identified in the Peer Review.

Taxation

Pillar One - Amount B

As part of the two-pillar solution agreed by the Inclusive Framework in October 2021, Amount B provides for a simplified and streamlined approach to the application of the arm's length principle to in-country baseline marketing and distribution activities, with a particular focus on the needs of low-capacity countries. Content from this report will be incorporated into the OECD Transfer Pricing Guidelines by January 2024.

Governance

Addressing Inequality in Budgeting Lessons from Recent Country Experience

In many countries, public expenditure, including transfers, plays a major role in reducing income inequality. The report reviews the various ways that budgeting can be used to this end. A first includes taking a broad approach to results-based budgeting, taking social and distributional goals into consideration. A second relies on integrating distributional impact analysis directly into the budget process. The report discusses the concrete experience of eight OECD countries in this area, analysing how they are integrating distributional impact assessment in spending and budgeting decisions. Finally, it discusses the tools, frameworks and data that are needed to take distributional considerations into account as part of evidence-informed policy making.

Public Administration in Ukraine Assessment against the Principles of Public Administration

This report analyses the performance of public administration in Ukraine through a set of standard indicators based on the Principles of Public Administration.

The Principles set out what good public governance entails in practice and outline the main requirements to be followed by countries during the European Union (EU) integration process. They address the preconditions for a good public administration (good laws, policies, institutional capacity and procedures) and how an administration performs in practice.

In its 2014 and 2018 Enlargement Strategies, the European Commission highlighted public administration reform as one of three “fundamentals first” areas of the EU enlargement process. Given the European Council decision of December 2023 to open accession negotiations with Ukraine, this report provides data and recommendations on how Ukraine could better meet the standards set by the Principles.

The report follows up on the 2018 SIGMA Baseline Measurement Report and provides comparative information on reform successes and remaining challenges. It covers the six thematic areas of the Principles (strategic framework of public administration reform, policy development and co-ordination, public service and human resource management, accountability, service delivery and public financial management). The report provides indicator values and comparison of overall trends across the administration.

OECD Review of the Corporate Governance of State-Owned Enterprises in Kazakhstan

The Kazakh government has undertaken crucial legal and regulatory reforms to improve the governance and performance of its state-owned enterprises (SOEs), but further reforms are needed. This review describes and assesses the corporate governance framework of the Kazakh SOE sector against the OECD Guidelines on Corporate Governance of State-Owned Enterprises. It makes recommendations to help the Kazakh authorities reform their state-owned sector and align the exercise of state ownership and the governance of SOEs with international best practices.



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Trade

OECD Services Trade Restrictiveness Index Policy Trends up to 2024

This report highlights key policy developments up to 2024 and the latest trends affecting services trade and digital trade. It also indicates best practices and the countries that lead in services reforms. The OECD Services Trade Restrictiveness Index (STRI) provides annually updated, comparable information on regulations affecting trade in services across 50 countries and 22 sectors from 2014 to 2024. The OECD's quantification of services regimes across countries and over time seeks to inform the decisions of policy makers and regulators, to convey transparent and accessible information to exporters, and to provide a source of data for academic research on drivers and impediments to services trade.

Education

How 15-year-olds learn English Case studies from Finland, Greece, Israel, the Netherlands and Portugal

This report takes the reader into the lives of young people in Finland, Greece, Israel, the Netherlands and Portugal to explore the question: how do 15-year-olds learn English? Gone are the days when learners only encountered English for a couple of hours a week in a classroom. For today's teens, English is often the preferred language of communication in increasingly diverse online and offline communities. Yet relatively little is known internationally about how students learn English inside and outside school, and the resources available to help them. This report presents country findings from interviews with 15-year-olds, English-language teachers and school principals and wider background research, as well as a comparative chapter on key international insights. The report also explores how today's digital technologies can support learners to develop foreign language proficiency. These findings support the forthcoming PISA 2025 Foreign Language Assessment through which the OECD will generate comparable data on students' proficiency in English in different countries and on the factors related to it.

Employment

Impact Evaluation of Training and Wage Subsidies for the Unemployed in Greece

This report uses rich administrative data from different registers in Greece to evaluate the impact of two types of active labour market policies (ALMPs): wage subsidies and training for unemployed people. The report finds a positive impact of both types of ALMPs and makes recommendations for further improving the effectiveness of Greece's ALMPs and strengthening the capacity of the authorities to conduct ALMP impact evaluations. This report is the twelfth in a series of country reports on policies to connect people with better jobs. It was produced as part of the OECD's project with the European Commission which aims to raise the quality of the data collected and their use in the evaluation of the effectiveness of ALMPs.

Employment

Building a Skilled Cyber Security Workforce in Europe Insights from France, Germany and Poland

In an increasingly digital world, the significance of cyber security for individuals, businesses, and governments has never been greater. Rising cyber attacks are challenging current defence and operational capabilities, highlighting a critical shortage of skilled cyber security professionals. This report delves into the demand for cyber security expertise by analysing online job postings in France, Germany and Poland in between 2018 and 2023. It examines trends in the demand for cyber security professionals, the geographical distribution of job opportunities, and the changing skill requirements in this field. Focusing on France, the report also explores cyber security education and training programmes, the characteristics of the programmes, the demographics of enrolled learners, and their outcomes. Additionally, it reviews French policies and initiatives aimed at broadening the cyber security workforce and enhancing educational opportunities in this field. This comprehensive analysis is part of a larger effort to understand the evolving landscape of cyber security policies and professional experiences worldwide.

Social issues/Migration/Health

Beating Cancer Inequalities in the EU Spotlight on Cancer Prevention and Early Detection

Cancer causes almost a quarter of all deaths in the EU27, Norway and Iceland, with five new cancer cases diagnosed every minute in 2022. Assessing and improving cancer care from prevention to treatment is essential for promoting longer, healthier lives. This report addresses the latest trends in cancer incidence and mortality in the EU and reviews key cancer risk factors, cancer screening programmes and early diagnoses, and issues in the provision of high-quality cancer care. Country performance, cross-cutting challenges and new developments are examined with a particular focus on disparities by regions, socio-economic status and gender. The report provides policy makers with fiscal, regulatory and health systems organisation tools, as well as examples of initiatives that can be undertaken in primary care, workplaces, and schools to better control cancer and counter inequalities.

Securing Medical Supply Chains in a Post-Pandemic World

Secure medical supply chains are a cornerstone of resilient health systems. Medical supply chains are complex and internationalised, often involving many suppliers. The COVID-19 pandemic, which combined an unprecedented surge in demand with interruptions in supply and trade, exacerbated pre-existing, rising shortages of essential medicines, such as antibiotics and anaesthetics, and generated shortages of medical devices, such as face masks and respirators. This report offers insights into the risks and vulnerabilities of the supply chains of medicines and medical devices. Policy options to anticipate and mitigate risks of shortages of medicines and medical devices, both routinely and in the context of severe crises, are analysed. Most importantly, the report shows that strengthening the long-term resilience of medical supply chains requires collaborative approaches that balance measures best undertaken by the private sector with those more appropriately managed by governments or supranationally.



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Social issues/Migration/Health

Return, Reintegration and Re-migration Understanding Return Dynamics and the Role of Family and Community

Return migration has emerged as a critical policy concern for both destination and origin countries. While policy attention in destination countries has been focused on assisted voluntary return and reintegration (AVRR) programs, particularly for migrants with expulsion orders, these efforts represent only a fraction of broader return movements. This report, based on a project carried out by the OECD with support from the German Corporation for International Co-operation (Deutsche Gesellschaft für Internationale Zusammenarbeit GmbH – GIZ), commissioned by the Federal Ministry for Economic Co-operation and Development, analyses the scope and characteristics of different categories of return migration.

The report draws on three workshops, held in Tunis, Rabat and Brussels, that discussed return migration in different contexts. It examines the multiple factors that influence migrants' decisions to return to their countries of origin and their reintegration at home, including the role of family and community. The report emphasises the pre-existing structures and networks of returning migrants in origin countries and their role in supporting different types of return migrants. The report also looks at potential re-migration.



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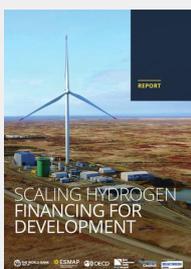
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Environment

Mainstreaming Biodiversity into Renewable Power Infrastructure

As countries scale up climate action, they face the challenge of expanding renewable power while tackling biodiversity loss. Transitioning away from fossil fuels can reduce climate-related pressure on biodiversity, but brings its own risks. Unless carefully managed, the expansion of renewable power could compromise biodiversity. This report synthesises evidence on biodiversity impacts from renewable power infrastructure, with a focus on solar power, wind power and power lines. It identifies opportunities for mainstreaming biodiversity into power sector planning and policy to deliver better outcomes for nature and the climate. Drawing on good practice insights from across the globe, the report offers governments recommendations to align renewable power expansion with biodiversity goals.



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Scaling Hydrogen Financing for Development

This report report on scaling up clean hydrogen financing provides a unique and in-depth proposal to transform ideas into attractive investment projects. It highlights how policy and financial risk mitigation mechanisms play a critical role in slashing the funding gap and reducing the cost of hydrogen generation. The findings promise to boost clean hydrogen lighthouse projects to revolutionize this multi-billion-dollar industry, so that emerging markets and developing countries can successfully participate in this nascent sector.

Environment

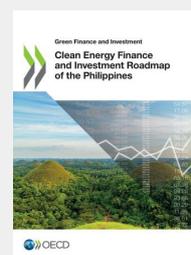
Clean Energy Finance and Investment Roadmap for the Philippines

In recent years, the Philippines has increased its commitment to climate action and its efforts to decarbonise the domestic economy. The Philippine power sector accounts for 58% of the country's overall carbon emissions and will be an important driver of domestic emission reduction efforts to meet national climate and energy targets. Renewables, such as offshore wind, are expected to play a key role in the transition toward a low-carbon energy mix. With more than 17 thousand kilometers of coastline, the Philippines is estimated to have an offshore wind potential of 178 GW. However, this potential has yet to be leveraged. Alongside a changing power sector, progress on energy efficiency is needed to achieve the country's emission reduction goals, with energy savings estimated at approximately 2% annually for the residential and commercial sectors. To deliver a clean energy transition, the Philippines requires estimated cumulative investments of over USD 300 billion between now and 2040. This report outlines key actions needed to unlock finance and investment in offshore wind power and energy efficiency in public buildings. It also provides a comprehensive overview of the progress to date and the challenges to mobilise near-term finance in those sectors, assist the Philippines transition towards a low-carbon economy, and achieve broader development goals.

Urban, Rural and Regional Development

OECD Territorial Reviews: Brussels-Capital Region, Belgium

The OECD Territorial Review of the Brussels-Capital Region, Belgium, provides an in-depth assessment of the trends, challenges and opportunities for sustainable and inclusive urban development in the region. It aims to help tackle the so-called 'Brussels paradox' between a highly performing region in terms of economic wealth creation and competitiveness but relatively poor social conditions. The region is also grappling with a shortage of affordable and quality housing, as well as several mobility challenges, including a high reliance on individual cars and traffic congestion, resulting in high commuting times and pollution levels, despite good accessibility to public transport. Although a comprehensive urban and land-use planning system exists, there is a lack of co-ordination with the surrounding regions and municipalities to drive more effective policies on housing, mobility, and other infrastructure investments. This review also examines the governance and institutional framework and suggests policy actions to strengthen co-ordination and co-operation mechanisms, and promote incremental collaboration at the metropolitan level. Finally, the review provides recommendations to enhance public finances in the region, focusing on better compensating for its additional charges, co-ordinating public investment among levels of government more efficiently, and establishing a metropolitan fund.



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Development

Fostering Catastrophe Bond Markets in Asia and the Pacific

As climate change increases exposure to natural disasters, countries need new solutions to mitigate risks of natural hazards. For many in Asia and the Pacific, mobilising existing resources is not enough: they need to consider a grand design of disaster risk financing strategies. Catastrophe bonds (CAT bonds) can be an effective, market-based financing tool for the region. While the global CAT bond market has grown steadily since the 1990s, it remains weakly developed in Asia and the Pacific. Its successful development there requires robust purpose-built legal frameworks; developed general bond markets, especially in local currency; appropriate capacity building; and data-driven pricing models. This report explores each of these conditions along with policy suggestions for fostering them, and discusses the development of multi-country CAT bonds in Asia and the Pacific.

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