POLICY BRIEF

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Economic Survey of Belgium, 2005

Summary

The dominant challenge for Belgium in the years to come is to prepare for population ageing. This entails putting in place policies to attenuate its effects on economic growth and public finances. The few years left before large numbers of baby boomers retire provide a window of opportunity to push ahead with such policies and so preserve the essential elements of the system of social protection. *First*, further budget consolidation is required to put public finances on a sustainable path. *Second*, reforms are needed to increase employment rates, especially for the older working age-population, school leavers and ethnic minorities, and to slow the decline in working time. *Finally*, reforms are required to raise productivity growth.

Public finances need to be put on a sustainable path. The government should implement consolidation measures to improve the structural budget balance by about 1% of GDP by 2007, with the focus being on expenditure restraint. Healthcare reforms will be needed to contain expenditure growth in the medium term. Should efficiency reforms fail to constrain adequately the growth in public health expenditure, it will also be necessary for the authorities to re-consider the public share of healthcare expenditures. Savings on government expenditure to make room for reducing the high tax rates on labour income should be sought by increasing the efficiency of government and reducing subsidies. In particular, high public transport subsidies should be reduced when it becomes feasible to introduce road pricing, also reducing the economic cost of climate change policies.

Labour utilisation should be increased. Belgium has considerable scope to attenuate the effects of population ageing by raising the currently low employment rate of school leavers, older workers and ethnic minorities and slowing the decline in working time. This should be mainly achieved by progressively phasing out subsidies for early retirement (abolishing the older unemployed scheme and making retirement decisions actuarially neutral) and using budgetary room to reduce the taxes on labour income. Furthermore, job-search requirements should be more rigorously enforced and active labour market policies redirected from job creation to job placement. The government should also ease EPL on temporary employment contracts, lower barriers to student work and seek ways to improve

This Policy Brief *presents the assessment and recommendations of the 2005* OECD Economic Survey of Belgium*. The Economic and Development Review Committee, which is made up of the 30 member countries and the European Commission, reviewed this Survey. The starting point for the* Survey *is a draft prepared by the Economics Department which is then modified following the Committee's discussions, and issued under the responsibility of the Committee.*

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education outcomes to enable more young people to find a first job. Better education outcomes would also help to improve labour-market integration of ethnic minorities, and more effective anti-discrimination measures are required. Successful programmes to improve the language competence of migrant children should be offered more widely.

Productivity growth should be strengthened. Increasing productivity growth would also attenuate the costs of population ageing. This could be facilitated by removing barriers to productivity growth in ICT-using sectors (in particular retail trade and, at the European level, in retail banking), strengthening product market competition and refocusing innovation policy. Reaping the benefits from applying more ICT in the distribution sector will require easing zoning restrictions, simplifying rules on overtime, making shop opening hours more flexible and widening the scope for temporary work contracts. In retail banking, the Belgian authorities and their European counterparts should fully implement the Financial Services Action Plan and apply the four-level "Lamfalussy framework". The high administrative burden on entrepreneurship should be reduced. Competition should be increased in the electricity sector by a series of measures limiting the incumbent's capacity to abuse its market power. Tertiary education and research institutions could be made more efficient by increasing inter-university competition and the share of private contributions. Innovation policy should provide more support for organisational change, enhance collaboration between business and researchers and foster a broader and more rapid diffusion of knowledge. This should be complemented by improving the ICT-using competencies of persons with lower intermediate skills and low education attainment. ■

What are the main policy challenges?

Belgium's population is ageing, albeit a little less quickly than the OECD average. Growing numbers of baby boomers will retire from around the end of the current decade. This will reduce economic growth mainly through lower growth in the labour supply and will put pressure on public finances for decades to come. While progress has been made in implementing policies to minimise the costs of this demographic shock, notably by a substantial reduction of public debt, the few years left before large numbers of baby boomers retire provide a window of opportunity to go further in implementing such policies and thereby preserving the essential elements of the system of social protection. First, budget consolidation is required to put public finances on a sustainable path – defined as one where government programmes can be financed indefinitely at constant tax rates and public debt eventually stabilises as a share of GDP (as a euro-area country, this must also be less than 60% of GDP). Second, reforms need to be made to increase employment rates, especially for the older working age-population, the younger working-age population and ethnic minorities, and to slow further the decline in working time. Finally, reforms are required to increase productivity growth. With the economy in the recovery phase of the business cycle, this is the ideal time to make substantial progress in implementing these policies. ■

What effect does population ageing have on the long-term economic outlook?

Assuming a persistent decrease of working time, *albeit* smaller than in the past 30 years, and no further significant decrease of the structural unemployment rate, economic growth could fall from an annual average rate of around 2% in the current decade to a little over 1% over the period 2010-2050 according to OECD projections. However these projections do not take into account the future effects on labour supply of the 2001 tax reform, reductions in social security contributions, measures to increase job search and the 1996 pension reform. Taking these factors into account and assuming that further measures will be taken to increase the employment rate, notably for the older working-age population, and that the labour productivity growth rate will rise above the recent trend, the High Finance Council (HFC), which prepares annual projections of the economic- and budget impact of population ageing, projects a more modest decline in the economic growth rate, to around 1½ per cent by 2030. On the basis of this outlook and assuming that the government continues to take measures regularly to restrain healthcare outlays, the HFC projects that the budget cost of population ageing will rise to 3.4% of GDP in 2030, mainly reflecting higher outlays for pensions and healthcare. However, if economic growth were to be as projected by the OECD, which would entail a lower employment rate for the older working-age population, which receives high social benefits, the budget cost of population ageing would be about 1% of GDP higher. ■

How much budget consolidation is required to put public finances on a sustainable path?

Public finances should be put on a sustainable path so as to avoid large increases in taxes – and hence in the excess burden of taxation – or brutal cuts in social programmes when ageing-related budget pressures rise. The HFC estimates that public finances would be on a sustainable path if the structural budget balance were increased to a surplus of 0.3% of GDP in 2007 rising to 1½ per cent of GDP over 2011-2018 before slowly falling back to zero by 2030 as the budget costs of ageing rise. Public debt would fall from 97% of GDP in 2004 to 30% by 2030. Effectively, lower interest payments make room for higher ageing-related budget costs on this trajectory. There is still some way to go to put public finances onto this path – taking into account announced measures and abstracting from non-recurring transactions, the structural budget balance is projected by the OECD to be a deficit of around ½ per cent of GDP in 2007, similar to the estimated current level. *The government should take consolidation measures to increase the structural budget balance (abstracting from non-recurring items) by about 1% of GDP by 2007 so as to put public finances on a sustainable path. In view of Belgium's already high tax burden and the adverse effects that this has on economic activity, the priority should be given to expenditure restraint in budget consolidation*.

Growth in healthcare expenditures represents a significant risk to the sustainability of public finances. Following pressures that built up in recent years when restrictions were imposed to contain expenditure growth and in response to concerns about equitable access to healthcare, the government lifted the budget limit on real growth in public healthcare outlays to an annual average rate of 4.5% over 2003-2007. Cutting that growth rate to 2.8% on average over 2008-2030, as estimated in the HFC projections, is likely to be a major challenge. There are a number of measures that are being implemented to restrain growth in healthcare expenditures, mainly by increasing efficiency, including: Diagnosis Related Group arrangements for hospital financing; incentives to develop a gatekeeper role for general practitioners; incentives for the development of a centralised electronic medical file for patients; benchmarking of prescription behaviour and medical practice; and increasing incentives for the use of generic drugs when they are medically equivalent substitutes for formerly patented drugs. *The government should pursue these reforms more vigorously by: not reimbursing medical expenses for patients not referred by a gatekeeper; ensuring that complete and up-to-date electronic medical files are available for consultation by medical practitioners for all patients; and by not reimbursing the difference in price between registered and generic drugs*. The latter measure should not be too harmful to incentives to develop new medicines given that Belgium is also liberalising licensing policies for new drugs. If it proves not to be possible to restrain growth in healthcare expenditures to the extent assumed, the government will need to consider the extent to which it responds by reducing its share of total healthcare expenditures as opposed to increasing taxes and/or reducing other expenditures. ■

What could be done to increase the employment rate?

Belgium's low employment rate (60%) leaves great room for improvement and can even be a potential advantage compared with other countries in coping with population ageing in that there is considerable scope to offset some of the ageing-related deceleration in labour supply by drawing inactive members of the population into employment, although this will require challenging reforms. Employment rates are particularly low for older workers (28% of the population aged 55-64), younger workers (27% of the population aged 15-24) and ethnic minorities; by contrast, rates are near international averages for prime-age workers. It was estimated in a recent OECD study that if a set of very ambitious reforms to increase employment rates were implemented – reforms that go significantly beyond what is presently being considered in Belgium – employment would increase by 12% over the period to 2050 instead of declining slightly in the unchanged policy scenario. As noted above, the HFC assumes that only part of this potential will be exploited, which may be a reasonable assessment of Belgian popular preferences in this regard. Insofar as it would be possible to go further, that would attenuate the slowdown in growth in living standards as well as creating room for reductions in the tax burden whilst maintaining public finances on a sustainable path.

In order to achieve the HFC employment projection, it will be essential to reduce incentives further for older workers to leave the labour force prematurely. Older workers are encouraged to retire before age 60 through attractive income replacement options – pre-pension and "Canada Dry" arrangements (older unemployment benefit plus a top-up from the employer) that are mainly publicly financed. This also suits employers as steep age/seniority premiums in pay scales mainly for white collar workers make older workers relatively unattractive. These schemes were introduced in the 1970s and 1980s in response to widespread industrial restructuring. The idea was to make room for younger workers by facilitating the early retirement of older workers. Such schemes have manifestly failed in this regard as Belgium, like other countries with such schemes, has low employment rates for both older and younger workers. The government has increased the minimum age for entry into the older unemployment benefit scheme, which exempts beneficiaries from job-search obligations, from 55 in 2002 to 58 in July 2004. *The government should phase out these schemes by progressively aligning access conditions with those for early retirement pensions.* Once these schemes were merged, candidates for early retirement would have to have a significantly higher age or longer career history to qualify for a benefit than is currently the case. In addition, pension entitlements would no longer continue to accumulate for retired persons up to age 65, as occurs with pre-pension and "Canada Dry" arrangements. *Top-up payments to early retirees should also be taxed in the same way as regular labour earnings instead of at preferential rates or not at all, as is currently the case. In the transition phase, the top-up payments in pre-pension and "Canada Dry" arrangements should either be subject to full social security contributions or beneficiaries should not accumulate pension rights. Early-retirement pension should also be reduced on an actuarially fair basis relative to an old-age pension taken at age 65. Moreover, the accumulation of pension rights while receiving unemployment benefits should be limited to active job seekers, thus excluding early retirement and equivalent spells.* It could reasonably be expected that if attractive routes to early retirement were closed and job search requirements for older unemployment beneficiaries enforced (see below), the social partners would find it more rewarding to invest more in continuing education for older employees and to negotiate pay scales that do not price older workers out of the market and to improve working conditions.

There remains considerable scope to reduce the structural unemployment rate (around 7%), and especially long-term unemployment (almost half of the total) by more rigorously enforcing job search requirements for unemployment beneficiaries. The federal government has begun reviewing unemployment beneficiaries, starting with the youngest, to verify that they in fact fulfil their job-search obligations. It is expected that all beneficiaries up to age 50 will have been examined by mid-2007, at which point the exercise will be reviewed. *This process should be extended as soon as possible to cover unemployment beneficiaries aged 50 to 57 who are no longer exempted from job-search obligations. Subsequently the exemption from job-search requirements for unemployed persons aged 58 and over should be phased out and these obligations should equally be enforced.* More efficient use of ALMP resources would also help to reduce unemployment. While Belgian expenditure on ALMPs is around the European average as a share of GDP, a much higher proportion is devoted to public job creation schemes than in other countries. Redirecting such resources to career guidance and orientation would contribute to lowering the unemployment rate in the medium-term by reducing the duration of unemployment. It would also result in placement in more productive jobs with more potential for employees to enhance their human capital.

The low employment rate for the younger age group is not the counterpart of a high proportion of the population acquiring tertiary qualifications – indeed a high employment rate for this age group and a high proportion of young people obtaining tertiary qualifications tend to go together in OECD countries. Rather, it reflects poor education achievement in the French Community, high school drop-out rates, strict EPL for temporary contracts and fiscal and social security barriers to student work. The French Community is refocusing school curricula on core general skills (reading literacy, foreign languages, mathematics, and sciences) and devoting more resources to students from lower socio-economic backgrounds. This should also help to reduce drop-out rates. The Belgian authorities aim to strengthen the transition from education to work by emphasising job search requirements and closely monitoring search efforts. *If this reform fails to increase employment of younger age groups, benefits for persons who have never worked should be abolished.* This would increase the effectiveness of the various activation measures proposed by regional public employment services. *In addition, the government should ease EPL on temporary employment contractsand remove fiscal and social security barriers on student work* to enable more young people to find a job. This, together with an improvement in education achievement and attainment, would help to reduce the high (national) unemployment rate (19%) for this age group. Less strict EPL and lower fiscal and social security barriers to student work would also make it easier for students to finance their studies by working part time. ■

What is needed to improve labour-market integration of ethnic minorities?

Labour-market performance of ethnic minorities is also poor. The employment rate is one half of the rate for natives and the unemployment rate is three times that for natives. Poor educational outcomes on average contribute to this performance. According to the PISA study, the gap in achievement between natives and immigrants (including first generation) is one of the largest in the OECD area. Poor achievement then contributes to low attainment among immigrant groups, with a relatively high proportion of school drop outs and a low proportion of tertiary graduates. The poor education performance of immigrants seems mainly to be attributable to their low socio-economic status. Hence, the measures being taken to improve achievement among poorer social groups should be very helpful for immigrants. But some ethnic minorities may also get off to a bad start in education owing to their failure to have mastered their mother tongue before learning in one of Belgium's national languages. Flanders has introduced a programme whereby children first master their mother tongue and then move on to learning in Dutch. *If this programme proves to be successful, it should be offered on a wider basis, including in the French Community*. Immigrants' labour-market performance also appears to be weighed down by discrimination. According to survey results, a job applicant from an ethnic minority is three times less likely to be hired than a native with the same qualifications. Indeed, the employment rate for ethnic tertiary graduates is no higher than for unskilled natives. It appears that anti-discrimination legislation is difficult to enforce. *The government should devote more resources to enforcing this legislation and should finance publicity campaigns to counter discrimination. Reducing the costs of becoming self-employed, notably by lowering start-up costs, especially by lowering the administrative burden, would also help ethnic minorities to get around the costs of labour-market discrimination.* ■

How could the long-term decline in working time be slowed?

In addition to increasing the employment rate, the impact of population ageing on labour supply could also be attenuated by slowing the long-term decline in working time per person employed. Working time has fallen in recent decades mainly because of rising productivity, increasing taxes on labour income and rising female participation, and is somewhat below the OECD average. One of the effects of further reductions in taxes and social security contributions on labour income, building on the programme of tax cuts and reductions in social security contributions already under way, would be to further slow down the decline in hours worked per person employed. Reducing the tax burden on labour income would also diminish incentives for economic activity to occur in the shadow economy, widening the tax base and further reducing the efficiency costs of taxation. Making a reduction in the tax burden on labour income would require a fall in government expenditure as a share of GDP. Phasing out social security payments for pre-pensioners and unemployed persons who are not job seekers, as recommended above, would reduce social security outlays by 1% of GDP. If job search requirements were strictly enforced and social partners agreed to spend more on training for older workers and to flatten the age/seniority premium in pay scales, most of the people who would otherwise have been drawing benefits in early retirement would be employed and paying taxes rather than becoming long-term unemployed. Hence, such measures could make a useful contribution to reducing government expenditure. In addition, the measures aimed at increasing employment rates and reducing unemployment rates for the younger age group and for ethnic minorities would also have a positive budget impact, making room for further cuts in tax on labour income.

Room for cuts in tax on labour income could also be created by increasing government efficiency. The federal government has launched the *Copernicus* reforms to increase public sector efficiency. The main objective is to improve the quality of service provision within a given budget rather than to induce cost savings. *In view of the adverse effects on economic performance of high taxation, the government should also use these reforms to reduce administrative expenditure*. The *Copernicus* reforms consist of a greater use of ICT and change in work methods, the creation of a new management culture, a new approach to Human Resources Management (HRM) and the adoption of analytical accounting. So far, the gains from ICT have been limited and management reforms have been impeded by a lack of autonomy. *Outcome indicators (needed to measure performance in a more autonomous system) should be further developed to reinforce the analytical underpinning of the reforms.Moreover, managers need to be given more autonomy so that they can in fact be held accountable for outcomes*. *HRM practices should also be reformed to emphasise the development of competencies, make high quality management training compulsory, increase labour mobility and reduce early retirement through the creation of a job placement office within the public sector, and otherwise to make the public sector more attractive to high-skilled workers.Such reforms should also be implemented by other levels of government insofar as this has not already been done.*

Another area where budget savings could be made is public transport subsidies, which are high by international comparison. They are intended to encourage commuters to switch from private motor vehicles and thereby ease severe congestion problems as well as to reduce environmental externalities. Such subsidies are even set to increase from January 2005, when the government will pay 20% of rail commuter train ticket prices for private sector employees provided that their employers pay the other 80%; such train tickets are already free for public sector employees. This is a second-best solution to the main problem – road congestion – for which there are currently no suitable policy instruments in place; excise taxes on motor vehicle fuels and taxes on motor vehicle purchase and ownership are poorly targeted on congestion externalities. These arrangements are not only costly, they also encourage excessive mobility. Recent measures shifting taxation from vehicle ownership to fuel consumption go in the right direction. Nevertheless, *governments should consider introducing a road pricing system as soon as it becomes technically feasible and reliable, targeting fuel taxation on pollution externalities alone and reducing public transport subsidies accordingly.* ■

How could productivity growth be increased?

Although the level of hourly labour productivity is high – it is estimated to be somewhat higher than in the United States – there is nevertheless considerable scope to increase productivity growth. Productivity growth has surged in the United States and in some other countries since the mid-1990s, notably in ICT-using service sectors, whereas it has slowed down in Belgium, creating an opportunity to emulate the improved performance in these other countries. If it were possible to increase the average annual hourly labour productivity growth rate by 1 percentage point, the decline in the economic growth rate caused by population ageing would be offset and the budget cost of population ageing reduced by 0.8% of GDP in 2030. While this is certainly a large increase in labour productivity growth, it is comparable to what the United States and some other OECD countries have achieved since the mid-1990s. Again, budget savings from improved economic performance would make room for tax cuts without undermining fiscal sustainability.

The ICT-using service sectors that underpin the increase in labour productivity growth in the United States (and some other OECD countries) since the mid-1990s are distribution and finance. While labour productivity growth has also increased in the distribution sector in Belgium over this period, the increase has been much smaller than in the United States. In the finance sector, productivity growth has been falling. Although ICT is universally available, other ingredients are necessary for its productive use. The main barrier to greater use of ICT in the finance sector to raise productivity growth is the lack of integration of retail banking across Europe. *To remove barriers to integration,the Belgian authorities and their European counterparts should fully implement the Financial Services Action Plan and apply the four level* "*Lamfalussy framework*". Barriers to greater use of ICT to raise productivity in the Belgian distribution sector include restrictive zoning and licensing regulations for large format retail outlets, restrictive regulations on shop opening hours and a lack of flexibility on working hours – factors which limit economies of scale. A new law will come into effect in July 2005 that reduces regulatory barriers for large stores to enter the market or expand. *If the new law does not result in significantly higher entry or expansion of large stores, the authorities should ease zoning restrictions.The government should seek an agreement with social partners, as it is doing, on cutting back on strict and complex rules on overtime and on easing regulation of temporary work contracts. The government should also make shop opening hours more flexible.* Although there are factors beyond the control of the Belgian authorities that limit the scope for chain stores to realise productivity gains by exploiting an optimal mix of rail and road transport to save inventory cost and achieve just-in-time delivery, the regulatory framework in the rail freight industry could nevertheless be made more conducive to competition. The legal splitting of the state-owned NMBS/SNCB into an infrastructure company and a transport service provider took place in January 2005, with both companies being part of a new holding company. The rail regulator within the Federal Public Service of Mobility and Transport is now responsible for monitoring non-discriminatory access. *In the event that non-discriminatory access is not achieved within the new framework, the infrastructure manager should be more tightly regulated or, better still, the holding company should be broken up, ending ownership links between the incumbent's infrastructure and transport service companies.*

Product market competition more generally increases productivity growth by improving the allocation of resources and strengthening managers' incentives to raise efficiency and innovate. *In this regard, the authorities' plan to increase staffing at the competition authority is welcome, although more should be done to bring staffing closer to that in neighbouring countries*. Product market competition is restrained by relatively high use of command and control regulations. *To reduce recourse to such regulations, regulators should be required to assess alternative policy instruments (regulatory and non-regulatory) before adopting a new regulation and guidance should be issued on using alternatives to traditional regulation to achieve policy objectives.In addition, the government should continue to evaluate the need for remaining price controls and abolish them where they are no longer warranted*. In this respect, the case for professional bodies or representatives of trade and commercial interests being involved in specifying or enforcing pricing guidelines or regulations seems rather weak as does the case for maintaining price controls on medical drugs, taxi fares and petroleum products. Product market competition could also be strengthened by reducing barriers to entrepreneurship. The government programme to reduce the administrative burden on business is helpful in this regard. The Government intends in 2005 to abolish licences and permits for at least eleven trades (for example photography and watch making). *The high burden on entrepreneurship imposed by systems for licenses and permits should be reduced by introducing a "silence is consent rule" (*i.e.*, a rule that stipulates that licences are issued automatically if the licensing office has not acted by the end of the statutory response period) and by creating single contact points ("one-stop shops") for issuing or accepting notifications for licenses.*

There are also sector-specific measures that should be taken to increase competition. In particular, the laws and regulations that restrict the number of competitors in rail freight transport and in rail passenger transport, urban-, suburban- and inter-urban transport and in the provision of rail infrastructure and in ground handling at the airports should be abolished. In the electricity sector, major obstacles to more competition are the quasi-monopoly held by Electrabel in generation and the integration between generation and transport through majority ownership, slowing down the removal of transport bottlenecks and the increase in international interconnection capacity. Competition should be increased by auctioning a greater proportion of the incumbent's production capacity, increasing interconnection capacity, facilitating the granting of electricity production operating licences and by better monitoring of the respective markets in which the vertically integrated incumbent operates to reduce its scope to abuse its market power.

Innovation policy is also an important lever for increasing productivity growth. In view of the economic importance of service sectors, *a refocusing of existing innovation policies is needed to encourage more investments in organisational change*, which is a more important aspect of innovation in service sectors than in the rest of the economy. *This should be complemented by improving the ICT-using competencies of persons with lower intermediate skills and low education attainment.* The incentive for the private sector to engage in public-private partnerships will be increased from 2005 with the wage tax reduction granted to private sector R&D staff conditional on co-operation with a public research institution in Belgium. The decision to extend this condition to include public sector research institutions inside the European Economic Area is welcome as it increases the possible number and quality of matches and hence exploits a source of international technology transfer to national production units.

Universities have difficulty attracting and retaining high quality teachers and researchers. To overcome this difficulty, universities should be given greater freedom to negotiate contract conditions and should have more access to private sources of funding. This could be done through a greater involvement of the private sector (such as Chairs and research contracts). Another possibility would be to increase the scope for tuition fees combined with student loans with income-contingent repayments, especially for higher levels of tertiary education. Such systems in other countries have substantially increased the resources available to universities without having any adverse effects on either the proportion of the population completing tertiary education or the socio-economic mix of students. Public university funding should also be made more dependent on performance criteria and competition between universities should be increased, including by making external evaluations compulsory and publishing the results. ■

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