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Economics

OECD Economic Outlook, Volume 2020 Issue 1

The OECD Economic Outlook is the OECD's twice-yearly analysis of the major economic trends and prospects for the next two years. The Outlook puts forward a consistent set of projections for output, employment, prices, fiscal and current account balances.

Coverage is provided for all OECD member countries as well as for selected non-member countries. This issue includes a general assessment of the macroeconomic situation, a series of notes on the macroeconomic and structural policy issues related to the COVID-19 outbreak and a chapter summarising developments and providing projections for each individual country.



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Finance and Investment

OECD Investment Policy Reviews: Egypt 2020

This review uses the OECD Policy Framework for Investment to provide an assessment of the investment climate in Egypt and to discuss the challenges and opportunities faced by the government of Egypt in its reform efforts. The review examines trends in foreign investment and their socio-economic benefits, the country's wider regulatory framework on investors' entry and expansion, its legal framework for investment, and its strategy for investment promotion and facilitation. It also looks at Egypt's zone-based policies, tax policy and investment incentives, its strategies to promote responsible business conduct, and progress in infrastructure connectivity.



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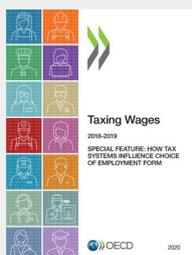
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Taxation

Taxing Wages 2020

This annual publication provides details of taxes paid on wages in OECD countries. It covers personal income taxes and social security contributions paid by employees, social security contributions and payroll taxes paid by employers, and cash benefits received by workers. It illustrates how these taxes and benefits are calculated in each member country and examines how they impact household incomes. The results also enable quantitative cross-country comparisons of labour cost levels and the overall tax and benefit position of single persons and families on different levels of earnings. The publication shows average and marginal effective tax rates on labour costs for eight different household types, which vary by income level and household composition (single persons, single parents, one or two earner couples with or without children). The average tax rates measure the part of gross wage earnings or labour costs taken in tax and social security contributions, both before and after cash benefits, and the marginal tax rates the part of a small increase of gross earnings or labour costs that is paid in these levies.

Taxing Wages 2020 includes a special feature entitled: “How Tax Systems Influence Choice of Employment Form”.

Governance

OECD Sovereign Borrowing Outlook 2020

The OECD Sovereign Borrowing Outlook provides regular updates on trends and developments associated with sovereign borrowing requirements, funding strategies, market infrastructure and debt levels from the perspective of public debt managers. The Outlook makes a policy distinction between funding strategy and borrowing requirements. The central government marketable gross borrowing needs, or requirements, are calculated on the basis of budget deficits and redemptions. The funding strategy entails decisions on how borrowing needs are going to be financed using different instruments and which distribution channels are being used.

This edition reviews developments in response to the COVID-19 pandemic for government borrowing needs, funding conditions and funding strategies in the OECD area, updating 2020 estimates released prior to the outbreak. It examines debt issuance trends for government securities in emerging market and developing economies since 2020, and presents novel insights on the impact of the COVID-19 pandemic on issuance conditions in these economies. It then discusses how debt management offices can adapt their governance practices to prioritise and deal with the aggravated operational and market risks presented by the COVID-19 crisis.

Governance

Improving Governance with Policy Evaluation Lessons From Country Experiences

Policy evaluation is a critical element of good governance, as it promotes public accountability and contributes to citizens' trust in government. Evaluation helps ensure that decisions are rooted in trustworthy evidence and deliver desired outcomes. Drawing on the first significant cross-country survey of policy evaluation practices covering 42 countries, this report offers a systemic analysis of the institutionalisation, quality and use of evaluation across countries and looks at how these three dimensions interrelate. The report also covers cross-cutting aspects related to regulatory assessment and performance budgeting. The analysis illustrates the role and functions of key institutions within the executive, such as centres of government and ministries of finance. It also underlines the role of supreme audit institutions.

Innovative Citizen Participation and New Democratic Institutions Catching the Deliberative Wave

Public authorities from all levels of government increasingly turn to Citizens' Assemblies, Juries, Panels and other representative deliberative processes to tackle complex policy problems ranging from climate change to infrastructure investment decisions. They convene groups of people representing a wide cross-section of society for at least one full day – and often much longer – to learn, deliberate, and develop collective recommendations that consider the complexities and compromises required for solving multifaceted public issues. This "deliberative wave" has been building since the 1980s, gaining momentum since around 2010. This report has gathered close to 300 representative deliberative practices to explore trends in such processes, identify different models, and analyse the trade-offs among different design choices as well as the benefits and limits of public deliberation. It includes Good Practice Principles for Deliberative Processes for Public Decision Making, based on comparative empirical evidence gathered by the OECD and in collaboration with leading practitioners from government, civil society, and academics. Finally, the report explores the reasons and routes for embedding deliberative activities into public institutions to give citizens a more permanent and meaningful role in shaping the policies affecting their lives.



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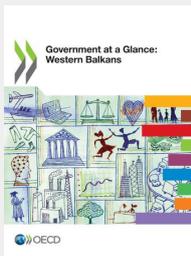
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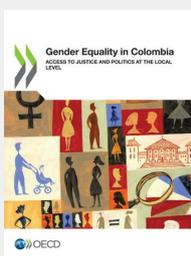
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Governance

Government at a Glance: Western Balkans

Government at a Glance: Western Balkans presents information on public governance in the Western Balkan region – covering Albania, Bosnia and Herzegovina, Kosovo, Montenegro, North Macedonia, and Serbia, and compares it to OECD and OECD-EU countries. This first regional edition features 40 indicators on public finance, public employment, centre of government, budgeting practices and procedures, human resources management, public procurement, digital government, core government results and serving citizens. Governance indicators provide important benchmarks on public administration systems, practices and performance. Indicators are presented in a user-friendly format using charts, with brief descriptive analyses of the major findings, and a methodological section on the definition of the indicator and any limitations in data comparability.

Regulatory Policy in the Slovak Republic Towards Future-Proof Regulation

Slovakia has introduced important reforms to strengthen its regulatory policy framework, but certain challenges remain. This report assesses the country's regulatory management capacity by taking stock of regulatory policies, institutions and tools, including administrative simplification policies, ex ante and ex post evaluation of regulations, stakeholder engagement practices, multi-level regulatory governance arrangements and innovative approaches to regulation. The review describes trends and recent developments, identifies gaps in relation to good practices and offers policy recommendations based on best international practices to strengthen the government's capacity to manage regulatory policy. Improving the entire regulatory policy cycle will ensure that regulations are built on a foundation of solid evidence and public participation and are designed to improve the security, health and well-being of citizens at a reasonable cost.

Gender Equality in Colombia Access to Justice and Politics at the Local Level

This report assesses women's access to justice and women's political participation in parliament, local councils and civil society organisations in Colombia. It examines existing legal, political and institutional frameworks in order to better understand successes, challenges and implementation gaps in the government's pursuit of access to justice and gender equality. The report also offers examples of different approaches in OECD countries and non-members to support Colombia. Based on this analysis, the report proposes actionable solutions to help Colombia design and deliver policies that effectively promote women's political participation and access to justice, including for survivors of gender-based violence.

Education

Education in Saudi Arabia

Saudi Arabia has embarked upon an unprecedented reform agenda known as Vision 2030, which aims to create a dynamic, diverse and sustainable economy. To meet the demands of a 21st century, knowledge-based labour market, Saudi Arabia must develop a highly-skilled population, which puts education at the centre of Vision 2030.

Saudi Arabia has made tremendous progress in expanding access to education and has achieved universal enrolment rates at primary and lower secondary levels. Nevertheless, most young Saudi Arabians leave school without having mastered the basic competences needed for success in future academic and professional endeavours. There are also widening disparities between students in terms of their access to high quality education and their subsequent learning outcomes.

This review, developed in co-operation with the Ministry of Education of Saudi Arabia, analyses the strengths and challenges of the country's education system and makes recommendations to help improve student learning. It will be of interest to policy makers in Saudi Arabia and international audiences who wish to learn about the country's ambitious reform efforts.

Quality Early Childhood Education and Care for Children Under Age 3

Results from the Starting Strong Survey 2018

The experience of children under age 3 with early childhood education and care (ECEC) is crucial for their learning, development and well-being and for parents' return to work. Despite increasing recognition of the importance of ECEC for the youngest children, little is known about this sector.

The OECD Starting Strong Teaching and Learning International Survey (TALIS Starting Strong) is the first international survey that focuses on the ECEC workforce. It asks staff and leaders about themselves and their settings, including the practices they use with children and their views on the sector. This thematic report focusses on ECEC for children under age 3, an option of the Survey in which four countries (Denmark, Germany, Israel and Norway) participated. The report answers many questions that are important for parents, actors in the field, and policy makers.



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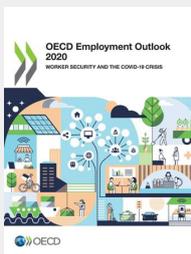
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Education

Labour Market Relevance and Outcomes of Higher Education in Four US States

Ohio, Texas, Virginia and Washington

Across OECD countries, higher education graduates enjoy higher employment rates and earnings than workers with only an upper secondary qualification. However, not all graduates find jobs that make full use of their skills and help them launch rewarding careers, and employers in some economic sectors point to a lack of qualified graduates. Policy makers are concerned about the current alignment of higher education systems to labour markets, and are increasingly uneasy about the future of work and the resilience of higher education systems in uncertain economic times. This report, which focuses on four US states – Ohio, Texas, Virginia and Washington – is the third of a series of country-specific reviews conducted as part of the OECD project on the labour market relevance and outcomes of higher education. The report offers a comprehensive review of graduate outcomes and policies supporting alignment between higher education and the labour market in the four participating states in 2018-19, an overview of the US labour market and higher education context, and a range of policy examples from across OECD jurisdictions to help improve the alignment of higher education and the labour market.

Employment

OECD Employment Outlook 2020

Worker Security and the COVID-19 Crisis

The 2020 edition of the OECD Employment Outlook focuses on worker security and the COVID-19 crisis. Chapter 1 provides an initial assessment of the labour market consequences of the COVID-19 outbreak and the resulting economic crisis. It also presents an overview of the emergency labour market and social policy measures implemented by OECD countries and discusses directions for further policy adaptation as countries move out of lockdown. Chapter 2 investigates the uneven access to unemployment benefits for workers in part-time and less stable jobs, which often accentuates the hardship they face in times of crisis, and discusses the difficult balance between work incentives and income security. Chapter 3 provides a comparative review of employment protection legislation (EPL) across OECD countries by developing a new version of the OECD's EPL indicators, which now include an improved assessment of regulations for collective redundancies, unfair dismissals and enforcement issues. Chapter 4 takes a fresh look at job polarisation, and in particular the hollowing out of jobs in middle-skill occupations. Finally, Chapter 5 examines the changing labour market outcomes for middle-educated vocational education and training graduates, whose labour market perspectives are challenged by the contraction of jobs in middle-skill occupations.

Employment

Preparing for the Future of Work in Canada

COVID-19 has led to a labour market shock in Canada and is likely to generate a profound reflection on production and consumption habits. COVID-19 is also likely to accelerate automation as firms look to new technologies to pandemic proof their operations. While automation offers the opportunity to boost productivity, it can also create losers as vulnerable workers who lose jobs may not have the skills needed in a changing labour market. This OECD report examines the potential impacts of automation on people and places across Canada with a special focus on the Province of Ontario. It also sheds light on policies and programmes that can help regions and cities to prepare for the future of work.



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Agriculture and Food

OECD-FAO Agricultural Outlook 2020-2029

The OECD-FAO Agricultural Outlook 2020-2029 is a collaborative effort of the Organisation for Economic Co-operation Development (OECD) and the Food and Agriculture Organization (FAO) of the United Nations, incorporating expertise from collaborating member countries and international commodity organisations. It provides market projections for national, regional and global supply and demand of major agricultural commodities, biofuel and fish.

During the preparation of the OECD-FAO Agricultural Outlook 2020-2029, the exact effects of the COVID-19 pandemic on agricultural markets were still largely unknown and they were therefore not incorporated in the baseline projections. Nevertheless, the Outlook aims to outline the channels of transmission of COVID-19 impacts on the various food and agriculture sectors.

Supplementary information can be found at www.agri-outlook.org.



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Environment

Accelerating Climate Action in Israel Refocusing Mitigation Policies for the Electricity, Residential and Transport Sectors

This report analyses the actions necessary in the near and medium term to reduce Israel's GHG emissions in three sectors— electricity, residential and transport, for which specific policy recommendations are developed. The report will serve as input to the roadmap that will be developed to support the country's long-term low-emission strategy (LT-LEDS). The report adopts a “well-being lens” that aims to integrate climate action and broader societal priorities, such as affordable housing, better accessibility to jobs, services and opportunities, and improved health. Such an approach can make climate policies both easier to implement politically, economically and socially, as well as more cost-effective. Particular attention is given to avoiding locking in unsustainable development pathways that would impede the achievement of net-zero carbon dioxide emissions in the second half of the century. In addition to the range of sector specific recommendations, a key recommendation for Israel is to enshrine the vision and targets of its LT-LEDS in national legislation, once developed and agreed. While written before the COVID-19 crisis, this report can also inform decisions on Israel's recovery from the crisis, helping to avoid actions that would lock-in “inferior” carbon-intensive paradigms and entrench inequalities or reduce quality of life more broadly.

Development

Multi-dimensional Review of Viet Nam Towards an Integrated, Transparent and Sustainable Economy

Since the launch of the Đổi Mới economic reforms in 1986, Viet Nam has achieved tremendous economic and social progress. Today, it is well integrated on global markets, has enjoyed robust growth, and has seen remarkable poverty reduction. With its recent successful fiscal consolidation, its attractiveness as a trading destination and rapidly growing domestic middle class, Viet Nam faces a window of opportunity for its transition to an inclusive market economy. Three guiderails should form the basis of this strategy: integration, transparency and sustainability. Better integration between state-owned enterprises, foreign investors and domestic private companies in open markets will be key to future performance gains. Partnerships between universities and enterprises would also help upgrade skills and create innovation, thereby making the integration durable. Transparency and performance of government are prerequisites for trust and a key lever to enhance efficiency and productivity in most areas of the state and the economy. A more sustainable development path will need better management of water, air and energy to address climate change. Reforms of the social security system can also ensure that no one is left behind, especially in the face of a fast ageing population.

Development

SIGI 2020 Regional Report for Latin America and the Caribbean

Gender equality and women's empowerment can only be achieved if countries take action to tackle and eliminate discrimination in their legal frameworks, social norms and practices. The SIGI 2020 Regional Report for Latin America and the Caribbean provides new evidence-based analysis on the setbacks and progress in achieving gender equality between 2014 and 2019. The report uncovers discrimination in social institutions faced by Latin American and Caribbean women in various dimensions; within the family and household context, in relation to physical integrity and access to productive and financial resources, as well within the political and civil spheres. It also explores various development perspectives such as the cost of discriminatory social institutions for Latin American and Caribbean countries and the socio-economic consequences of the COVID-19 pandemic for women and girls. Building on the regional and sub-regional analysis of how discriminatory social institutions continue to hinder efforts toward SDG 5, the report provides a set of policy recommendations to reshape gender norms, promote women's empowerment and build a truly inclusive society.



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