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## Economics

### OECD Economic Surveys: Korea 2020

Economic activity has contracted less in Korea than in other OECD countries, thanks to the prompt and effective reaction of the authorities to contain the spread of the COVID-19 virus and to the wide-ranging government support to households and businesses. Nevertheless, the pandemic generates strong headwinds. Huge uncertainty surrounds global economic prospects and hence the outlook for exports, which are a key engine of the Korean economy. The crisis will have a lasting effect on some economic sectors and therefore require significant resource reallocation. The impact of the COVID-19 pandemic compounds pre-existing challenges, notably rapid population ageing and relatively low productivity in parts of the economy. This Survey draws on the OECD Jobs Strategy to outline policies to enable the creation of more and higher-quality jobs and foster more inclusive growth. It also highlights how further digitalisation can boost productivity growth, competitiveness and well-being.

SPECIAL FEATURES: AGEING, DIGITALISATION

### OECD Economic Surveys: Greece 2020

Greece's economy had been expanding by nearly 2% for over three years before the COVID-19 shock. Structural reforms, high primary budget surpluses and debt measures underpinned Greece's recovery and rising confidence. Then the COVID-19 pandemic struck, abruptly interrupting the recovery and adding new challenges to raising inclusiveness, competitiveness and growth. This Survey proposes an ambitious set of reforms to overcome the COVID-19 shock while promoting a stronger and more inclusive growth. Aiding businesses and workers to upgrade their activities and skills and to shift to more promising sectors would accelerate the recovery and enhance resiliency to future shocks. Raising productivity and investment growth will require reducing barriers to competition, increasing the public administration and justice system's effectiveness, cutting red tape and accelerating the repair of the banking system. Strengthening active labour market programmes, education and training programmes, better supporting carers, and reducing the high labour tax wedge would expand job opportunities and improve inclusiveness. Raising the quality of public spending and improving the effectiveness of the tax system would help Greece to gradually shift the primary budget balance back to surplus, maintain its hard-won fiscal credibility and support inclusive growth.

SPECIAL FEATURE: REJUVINATING GREECE'S LABOUR MARKET TO GENERATE MORE AND HIGHER-QUALITY JOBS



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## Economics

### OECD Economic Surveys: South Africa 2020

The COVID-19 outbreak is worsening an already fragile economic outlook. Since 2013, growth has been modest and unemployment has been rising. Policy uncertainty has been the main driver of low confidence and subdued investment. Following a sharp fiscal deterioration in recent years, the crisis also heightened debt sustainability challenges. Curbing the public sector wage bill, restructuring SOEs and containing spending growth in higher education are urgently needed to improve spending efficiency and restore fiscal sustainability. Supporting the economic recovery in the short-run while accelerating structural reforms to increase potential growth is key. In the medium term, developing tourism, boosting transport infrastructure investments, promoting renewable energies and strengthening the social protection system can contribute to more sustainable and inclusive growth.

SPECIAL FEATURE: SOCIAL PROTECTION AND TOURISM

## Finance & Investment

### OECD Business and Finance Outlook 2020 Sustainable and Resilient Finance

The OECD Business and Finance Outlook is an annual publication that presents unique data and analysis on the trends, both positive and negative, that are shaping tomorrow's world of business, finance and investment. The COVID-19 pandemic has highlighted an urgent need to consider resilience in finance, both in the financial system itself and in the role played by capital and investors in making economic and social systems more dynamic and able to withstand external shocks. Using analysis from a wide range of perspectives, this year's edition focuses on the environmental, social and governance (ESG) factors that are rapidly becoming a part of mainstream finance. It evaluates current ESG practices, and identifies priorities and actions to better align investments with sustainable, long-term value – in particular, the need for more consistent, comparable and available data on ESG performance.

## Finance & Investment

### OECD Institutional Investors Statistics 2020

Institutional investors (investment funds, insurance companies and pension funds) are major collectors of savings and suppliers of funds to financial markets. Their role as financial intermediaries and their impact on investment strategies have grown significantly over recent years along with deregulation and globalisation of financial markets.

This publication provides a unique set of statistics that reflect the level and structure of the financial assets and liabilities of institutional investors in the OECD countries (with the exception of Australia), and in Lithuania and the Russian Federation. Concepts and definitions are predominantly based on the System of National Accounts. Data are derived from national sources.

Data include outstanding amounts of financial assets and liabilities such as currency and deposits, securities, loans, and shares. When relevant, they are further broken down according to maturity and residency. The publication covers investment funds, of which open-end companies and closed-end companies, as well as insurance corporations and autonomous pension funds. Indicators are presented as percentages of GDP allowing for international comparisons, and at country level, both in national currency and as percentages of total financial assets of the investor. Time series display available data for the last eight years.

## Taxation

### OECD Tax Policy Reviews: Kazakhstan 2020

This report is part of the OECD Tax Policy Reviews publication series. The Reviews are intended to provide independent, comprehensive and comparative assessments of OECD member and non-member countries' tax systems as well as concrete recommendations for tax policy reform. By identifying tailored tax policy reform options, the objective of the Reviews is to enhance the design of existing tax policies and to support the adoption of new reforms. This report provides an assessment of Kazakhstan's tax system and recommendations for tax reform. Chapter 1 gives an overview of the main findings and Chapter 2 sets the scene for tax reform. Chapter 3 considers tax revenue trends and analysis of the tax mix. Chapter 4 examines equity issues in Kazakhstan and provides recommendations on the personal income tax, social security contributions and value added taxes. Chapter 5 focuses on tax competitiveness issues and provides recommendations on how to strengthen the design of both the corporate income tax and special tax regimes for SMEs.



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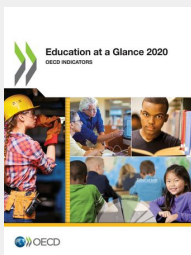
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## Governance

### Building Capacity for Evidence-Informed Policy-Making Lessons from Country Experiences

This report analyses the skills and capacities governments need to strengthen evidence-informed policy-making (EIPM) and identifies a range of possible interventions that are available to foster greater uptake of evidence. Increasing governments' capacity for evidence-informed is a critical part of good public governance. However, an effective connection between the supply and the demand for evidence in the policy-making process remains elusive.

This report offers concrete tools and a set of good practices for how the public sector can support senior officials, experts and advisors working at the political/administrative interface. This support entails investing in capability, opportunity and motivation and through behavioral changes. The report identifies a core skillset for EIPM at the individual level, including the capacity for understanding, obtaining, assessing, using, engaging with stakeholders, and applying evidence, which was developed in collaboration with the European Commission Joint Research Centre.

It also identifies a set of capacities at the organisational level that can be put in place across the machinery of government, throughout the role of interventions, strategies and tools to strengthen these capacities. The report concludes with a set of recommendations to assist governments in building their capacities.

## Education

### Education at a Glance 2020 OECD Indicators

Education at a Glance is the authoritative source for information on the state of education around the world. It provides data on the structure, finances and performance of education systems across OECD countries and a number of partner economies. More than 100 charts and tables in this publication – as well as links to much more available on the educational database – provide key information on the output of educational institutions; the impact of learning across countries; access, participation and progression in education; the financial resources invested in education; and teachers, the learning environment and the organisation of schools.

The 2020 edition includes a focus on vocational education and training, investigating participation in vocational education and training at various levels of education, the labour market and social outcomes of vocational graduates as well as the human and financial resources invested in vocational institutions. Two new indicators on how vocational education and training systems differ around the world and on upper secondary completion rate complement this topic. A specific chapter is dedicated to the Sustainable Development Goal 4, and investigates the quality and participation in secondary education.

## Education

### Back to the Future of Education Four OECD Scenarios for Schooling

Close your eyes for a second and think of something that happened over the last 20 years and you would have never expected to occur. Be it the pandemic, smart phones or something else, the truth is that the future likes to surprise us.

Our world is in a perpetual state of change. There are always multiple versions of the future—some are assumptions, others hopes and fears. To prepare, we have to consider not only the changes that appear most probable, but also the ones that we aren't expecting.

Inspired by the ground-breaking 2001 Schooling for Tomorrow scenarios, this book provides a set of scenarios on the future of schooling, showing not a single path into the future, but many. Using these scenarios can help us identify the opportunities and challenges that these futures could hold for schooling and education more broadly. We can then use those ideas to help us better prepare and act now.

Whether parents or students, teachers or educational leaders, researchers or policy makers, this book has been written for all those who want to think about futures that haven't occurred to play their part in shaping the future that will.

### 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.



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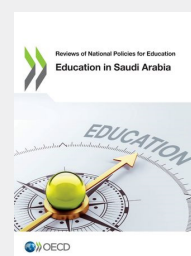
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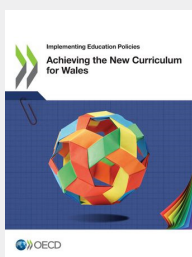
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## Education

### Achieving the New Curriculum for Wales

Wales (United Kingdom) is on the path to transform the way children learn, with a new curriculum aimed to prepare its children and young people to thrive at school and beyond. The new curriculum for Wales intends to create a better learning experience for students, to engage teachers' professionalism, and to contribute to the overall improvement of Welsh education. An education policy is only as good as its implementation, however, and Wales turned to the OECD for advice on the next steps to implement the curriculum. This report analyses the progress made with the new curriculum since 2016, and offers suggestions on the actions Wales should take to ready the system for further development and implementation. The analysis looks at the four pillars of implementation — curriculum policy design, stakeholders' engagement, policy context and implementation strategy — and builds upon the literature and experiences of OECD countries to provide tailored advice to Wales. In return, the report holds value not only for Wales, but also for other education systems across the OECD looking to implement a curriculum or to enhance their implementation processes altogether.

## Social Issues / Migration / Health

### All Hands In? Making Diversity Work for All

OECD societies have become increasingly diverse in the past decades, offering new opportunities if diversity is properly managed. Ensuring that OECD countries are equipped to make the most of diversity by fully utilising all talent among diverse populations and promoting inclusive labour markets is a key challenge. Both businesses and governments are responding to this challenge with policies to strengthen the inclusion of diverse groups in the workplace and labour markets. This report considers five key groups who are widely considered disadvantaged in the labour market and society at large and who often face discrimination based on their group membership: immigrants, their descendants and ethnic minorities; LGBT people; older people; people with disabilities; and women. It assesses: i) how the inclusion of these groups in OECD labour markets has evolved over time, ii) the evidence on how diversity affects economic outcomes; and iii) which policies countries have implemented and what is known about their effectiveness.

## Social Issues / Migration / Health

### Housing and Inclusive Growth

Housing is key to inclusive growth. It is the biggest spending item of household budgets, the main driver of wealth accumulation and biggest source of debt for most households. Housing and the neighbourhood in which people live also have important implications for individual health, employment and educational outcomes – effects that can begin in childhood and can last a lifetime. Nevertheless, the housing market may also present a barrier to inclusive growth for some groups, such as low-income households, children, youth, seniors and the homeless.

The COVID-19 pandemic has highlighted even more abruptly just how important housing issues are to people, and prompted governments to introduce a range of emergency housing supports. However, the pandemic has also underscored the need for governments to develop more structural responses to address persistent housing challenges.

This report assesses the key underlying pre-COVID-19 housing policy issues and proposes a series of recommendations to support more inclusive housing outcomes. These include measures to address some of the structural barriers to inclusive growth in the housing market, as well as measures to address the specific housing challenges facing vulnerable groups.

## Employment

### The Future for Low-Educated Workers in Belgium

The world of work is changing as a result of technological progress, globalisation and population ageing. The future of work holds many opportunities, but also presents distinct risks which tend to be greater for some population sub-groups, including low-educated workers. This report documents how the labour market for low-educated workers in Belgium has evolved in recent years and what the future might hold for them in terms of both job quality and quantity. Based on comparisons with neighbouring countries, the report seeks to provide policy advice to ensure that low-educated workers are not left behind by the changes that lie ahead.

## OECD Labour Force Statistics 2020

This annual edition of Labour Force Statistics provides detailed statistics on labour force, employment and unemployment, broken down by gender, as well as unemployment duration, employment status, employment by sector of activity and part-time employment. It also contains participation and unemployment rates by gender and detailed age groups as well as comparative tables for the main components of the labour force. Data are available for each OECD member country and for OECD-Total, Euro area and European Union. The time series presented in the publication cover 10 years for most countries. It also provides information on the sources and definitions used by member countries in the compilation of those statistics.



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## Science and Technology

### Going Digital in Brazil

Going Digital in Brazil analyses recent developments in Brazil's digital economy, reviews policies related to digitalisation and makes recommendations to increase policy coherence in this area.

The report examines the availability and quality of communication networks and services in Brazil, as well as related policies and regulations. It also reviews trends in digital technology usage among individuals, businesses and the government, and examines policies to foster diffusion. It discusses efforts to enhance trust in the digital economy, focusing on digital security, privacy and consumer protection. It also reviews policies to promote digital innovation and examines the policy implications of emerging business models in key sectors.

The report reconsiders these policies in relation to their coherence across different domains and provides recommendations to foster synergies across government ministries, levels and institutions, based on the OECD Going Digital Integrated Policy Framework.

## Environment

### Green Infrastructure in the Decade for Delivery Assessing Institutional Investment

Building green is not only imperative to achieve global climate and development commitments in this “decade for delivery”, but will also be critical to sustain socio-economic development during the COVID-19 recovery. Private investment in particular is needed to bridge the infrastructure investment gap, given institutional investors' large pools of long-term capital. After several years of efforts to upscale institutional investment in infrastructure, where does the level of investment stand today? This report provides a first-of-its-kind empirical assessment of investment in infrastructure by institutional investors domiciled in OECD and G20 countries, presenting a snapshot from February 2020. Based on a new detailed view of investment channels, financial instruments, sectoral allocations, regional preferences and trends, the report provides guidance on policy levers and priorities to scale-up institutional investment in green infrastructure.



## Development

### Sustainable Ocean for All Harnessing the Benefits of Sustainable Ocean Economies for Developing Countries

Adopting more sustainable ways of managing the ocean is a global priority: protecting its health will bring benefits to all. Developing countries face specific challenges, as many depend heavily on ocean-based industries and are overly exposed to the consequences of ocean degradation. Enhancing their access to science, policy advice and financing would allow them to tap better into the opportunities of a more sustainable ocean economy, including more decent jobs, cleaner energy, improved food security and enhanced resilience, while contributing to the protection of the world's ocean.

This report provides policy makers in developing countries, as well as their development co-operation partners with a wealth of fresh evidence on (i) the latest trends in selected ocean-based industries; (ii) policy instruments, including economic incentives, to promote ocean sustainability in various contexts; (iii) the first review of development finance and development co-operation practices in support of more sustainable ocean economies, including a discussion of how development co-operation can help re-orient private finance towards sustainability.

### Economic Outlook for Southeast Asia, China and India 2020 – Update Meeting the Challenges of COVID-19

The Economic Outlook for Southeast Asia, China and India is a bi-annual publication on regional economic growth, development and regional integration in Emerging Asia. It focuses on the economic conditions of the Association of Southeast Asian Nations (ASEAN) member countries: Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, the Philippines, Singapore, Thailand and Viet Nam. It also addresses relevant economic issues in China and India to fully reflect economic developments in the region.

The update of the Outlook comprises three main parts, each highlighting a particular dimension of recent economic developments in the region. The first part presents the regional economic monitor, depicting the economic outlook and macroeconomic challenges in the region. The second and third parts consist of special thematic chapters addressing major issues facing the region. The second chapter of this update focuses on the Covid-19 outbreak, discussing in particular the socio-economic impacts of the pandemic. An analysis of the quality of education in the region is discussed in the third chapter.



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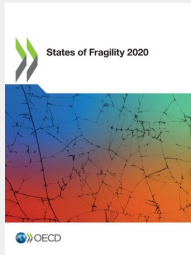
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## Development

### States of Fragility 2020

States of Fragility 2020 sets a policy agenda for fragility at a critical turning point: the final countdown on Agenda 2030 is at hand, and the pandemic has reversed hard-fought gains. This report examines fragility as a story in two parts: the global state of fragility that existed before COVID-19, and the dramatic impact the pandemic is having on that landscape. It acknowledges the severe reality of fragility in its multidimensionality and complexity. It explores thinking and practice on fragility to propose new ideas on human capital analysis and conflict prevention in order to adapt policy for more resilient outcomes. With a thematic emphasis on peace in fragile contexts, it highlights the important role of peacebuilders, diplomats, and security actors for peace, and builds the case for enhanced complementarity and coherence across the Humanitarian-Development-Peace nexus. It concludes by reconciling theory with practice to explore what it means to work effectively in fragile contexts. Focusing on fragility will be imperative to build peaceful, just and inclusive societies that leave no one behind.

### Latin American Economic Outlook 2020 Digital Transformation for Building Back Better

The Latin American Economic Outlook (LEO) 2020 focuses on the role of digital transformation in helping to navigate through challenging times. The Covid-19 pandemic is having a profound impact on socio-economic conditions, accentuating the already complex scenario faced by a region with significant structural weaknesses. This unprecedented crisis comes at a time of high aspirations and reinforces the need to transform the very foundations of the development model in the region. The report explores how digital transformation can help to cope with the current socio-economic situation, boost productivity, strengthen institutions and achieve higher levels of inclusion and well-being. The LEO 2020 also highlights that international partnerships are fundamental to reaping the benefits of the digital transformation.

The LEO is a joint annual publication produced by the OECD Development Centre, the United Nations Economic Commission for Latin America and the Caribbean (UN ECLAC), the Development Bank of Latin America (CAF) and the European Union (EU). It is the first pillar of the EU Regional Facility for Development in Transition for Latin America and the Caribbean.

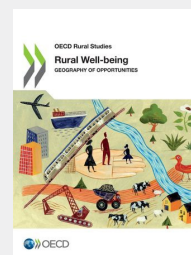
## Urban, Rural and Regional Development

### Rural Well-being Geography of Opportunities

Rural Well-being: Geography of Opportunities presents the latest iteration on this policy framework, reflecting several important changes in rural development in recent years. Fully taking into account the variety of situations characterising rural regions, the new policy framework leverages improved data and analysis while broadening the scope from economic focus to encompass the environmental and social dimensions of well-being. The new approach places the well-being of citizens at the forefront of its objective and recognises the diversity of rural places brought by a deeper understanding of their diverse and complex socio-economic systems and their connection to cities. The framework also looks to the future and unfolding megatrends such as globalisation, digitalisation, climate change and demographic change. It reflects on how these will impact rural economies and reviews policy options to mitigate the challenges and capitalise on opportunities as well as to develop resilience against emerging crises. Finally, recognising the strong interdependencies between different stakeholders and the need for partnerships between government, the private sector and civil society to successfully implement policies, the Rural Well-being Policy Framework focuses on governance mechanisms, including the OECD Principles on Rural Policy.

### Regional Policy for Greece Post-2020

The Territorial Review of Greece offers analysis and policy guidance to strengthen regional development and well-being. It examines Greece's regional development framework, the EU Cohesion policy and multilevel governance in Greece. Since the global financial crisis, Greece has undertaken an impressive number of structural reforms. Recovery initiated in 2017 but the current COVID-19 pandemic is slowing down Greece's efforts. The country is now facing a number of strategic development priorities including fostering digitalisation, improving entrepreneurial and business ecosystems, and addressing environmental challenges. These new priorities must also tackle existing social challenges and mitigate rising inequalities. The Review examines a range of policies that have the potential to propel inclusive growth in Greece's regions and improve the quality of life for their residents. It stresses that policies for economic growth, social capital and environmental sustainability are more effective when they recognise the different economic and social realities where people live and work. OECD work illustrates the importance to align place based regional development strategies with sectoral policies (support for private investment, infrastructure and human capital policies) in each place to generate multiplier effects. To fulfil this task, Greece will need to continue advancing the reform of its institutional and fiscal multi-level governance system.



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## Urban, Rural and Regional Development

### The Future of Regional Development and Public Investment in Wales, United Kingdom

The Welsh Government has set an ambitious and innovative path for regional development and public investment – one focused on generating growth and increasing productivity, while also reducing territorial disparities and ensuring the well-being of citizens, now and in the future. Yet, it faces significant challenges, accentuated by limited fiscal decentralisation and changes to public investment financing post-Brexit. This OECD Multi-level Governance Studies report provides the Welsh Government and Welsh local authorities with analysis and recommendations on how to achieve regional development and public investment aims. The report offers insight into how the Welsh Government and Welsh local authorities can increase their fiscal and public investment capacity, and strengthen their governance practices. It stresses that the Welsh Government's ability to coordinate regional development policy and associated public investment is a determining factor in meeting growth and well-being objectives. This report also proposes a variety of mechanisms to strengthen policy and service delivery at the local level. A case study featuring the challenges and benefits of establishing economic regions in Mid and South West Wales sheds a practical light on the various aspects explored throughout the report.

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