



1. Economics1	4. Social issue5	7. Industry&Services8	10. Agriculture&Food9
2. Taxation2	5. Education6	8. Science&Technology8	11. Development11
3. Governance2	6. Employment7	9. Environment9	12. Energy12

Economics

OECD Economic Surveys: United States 2022

The United States economy rebounded strongly from the depths of the pandemic recession, aided by a large and enduring government policy response. However, war in Ukraine and strong inflationary pressures are creating significant uncertainty and threatening the economic outlook. The administration is reinforcing public welfare through large-scale infrastructure spending, but an ageing population mean fiscal pressures are on the horizon. In response, further efforts should focus on both broadening the tax base and improve public spending efficiency, particularly in the areas of health and infrastructure. A persistent long-term challenge has been the hollowing out of the middle class, which has experienced stagnating incomes and rising costs of living. Two pressing policy challenges for this group relate to improving childcare and the climate transition. Expanding public investment in childcare can improve its affordability for the middle class and benefit female labour force participation. The impact on the middle class of policies to reach net zero carbon emissions by 2050 should be taken into account. An important aspect will be ensuring that active labour market policies and place-based policies are in place to tackle labour market disruptions as jobs reallocate from high-carbon to low-carbon activities.

SPECIAL FEATURES: POLICY CHALLENGES FOR THE MIDDLE CLASS; CHILD CARE; CLIMATE TRANSITION; PUBLIC SPENDING EFFICIENCY

A Systemic Recovery

New economic thinking and acting through a systemic approach could outline policy alternatives to tackle the global-scale systemic challenges of financial, economic, social and environmental emergencies, and help steer our recovery out of the current crisis. A systemic recovery requires an economic approach that balances several factors – markets and states, efficiency and resilience, growth and sustainability, national and global stability, short-term emergency measures and long-term structural change. To achieve this, we need to think beyond our policy silos, comprehend our interconnections, and build resilience into our systems.



Print ver.

Code: eco-2022-648-en-print

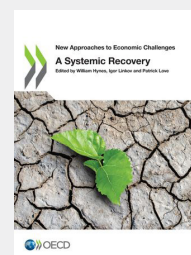
ISBN: 9789264976443

pages: 250 \$60.00

PDF ver.

ISBN: 9789264968493

\$36.00



Print ver.

Code: sge-2022-1-en-print

ISBN: 9789264643017

pages: 140 \$42.00

PDF ver.

ISBN: 9789264962859

\$25.00



Print ver.

Code: ctp-2022-976-en-print

ISBN: 9789264892132

pages: 226 \$66.00

PDF ver.

ISBN: 9789264832725

\$39.00



Print ver.

Code: daf-2022-172-en-print

ISBN: 9789264530522

pages: 185 \$54.00

PDF ver.

ISBN: 9789264361324

\$32.00



Print ver.

Code: daf-2022-179-en-print

ISBN: 9789264626478

pages: 64 \$30.00

PDF ver.

ISBN: 9789264726994

\$18.00

page: 2

Taxation

Country-by-Country Reporting – Compilation of 2022 Peer Review Reports Inclusive Framework on BEPS: Action 13

Under the Action 13 Minimum Standard, jurisdictions have committed to foster tax transparency by requesting the largest multinational enterprise groups (MNE Groups) to provide the global allocation of their income, taxes and other indicators of the location of economic activity. This unprecedented information on MNE Groups' operations across the world has boosted tax authorities' risk-assessment capabilities. The Action 13 Minimum Standard was translated into specific terms of reference and a methodology for the peer review process. The peer review of the Action 13 Minimum Standard has completed four annual reviews in 2018, 2019, 2020 and 2021. These cover the three key areas under review: the domestic legal and administrative framework, the exchange of information framework, and the confidentiality and appropriate use of Country-by-Country (CbC) reports. This fifth annual peer review report reflects the outcome of the fifth review which considered all aspects of implementation. It contains the review of 134 jurisdictions which provided legislation or information pertaining to the implementation of CbC Reporting.

Governance

OECD Review of the Corporate Governance of State-Owned Enterprises in Viet Nam

The Government of Viet Nam has made progress in recent years to improve its frameworks for the ownership and corporate governance of its state-owned enterprises (SOEs). This review assesses the corporate governance framework of the Viet Nam state-owned sector relative to the OECD Guidelines on Corporate Governance of State-owned Enterprises (SOE Guidelines). It then puts forward recommendations to help the Vietnamese authorities address remaining challenges and further professionalise the state ownership function.

The Swedish Corporate Bond Market and Bondholder Rights

This report provides a detailed account of the Swedish corporate bond market. Based on original data, it offers an overview of how the market has developed in the past two decades with respect to, among other things, size, issuer characteristics, risk profile and liquidity. In particular, it documents how the market has changed since the 2008 financial crisis and explores the increasingly important role of real estate companies in the local bond market. It also offers a comparison of the Swedish market with selected peer countries (European and non-European), both in terms of market structure and relevant regulation.

Governance

Anticipatory innovation governance model in Finland Towards a new way of governing

This report examined how Finland has been incorporating anticipatory functions within its governance system to deal with complex and future challenges in a systemic way. The report applies a new model of anticipatory innovation governance (AIG), developed by the OECD, addressing a considerable gap in prior knowledge and guidance on how governments prepare for unknowable futures. It consists of three parts: an overview of the anticipatory innovation governance model; the assessment of the anticipatory innovation capacity of the Finnish Government; and the pilot case studies, where the principles and functions of the model are explored in practice.

Scotland's Approach to Regulating Water Charges Innovation and Collaboration

The process, outputs and immediate outcomes mark a transformative change in the Scottish context, resulting in a shared commitment towards sustainable asset management and climate change objectives and a more open and transparent process.

Supporting Regulatory Reforms in Southeast Asia

Regulatory reforms have long been a focus for Southeast Asian nations, often as a way to improve the business climate and policy frameworks for trade and investment. The recent COVID-19 pandemic has spurred countries around the world to review and update their regulatory policies to respond to the current crisis and prepare for the next one. This publication presents a snapshot of the current state of regulatory reform across the region, with country profiles from all 10 Member States of the Association of Southeast Asian Nations (ASEAN) highlighting practices in three priority areas: whole-of-government initiatives, good regulatory practices, and use of digital technologies. It also offers an analysis of common themes identified across the profiles, including trends in regulatory reform, common challenges faced by countries, and future priorities in the region. It was developed in collaboration with the members of the ASEAN-OECD Good Regulatory Practices Network, and key regional partners including the ASEAN Secretariat and the Economic Research Institute for ASEAN and East Asia (ERIA).



Print ver.

Code: gov-2022-386-en-print

ISBN: 9789264472648

pages: 338 \$102.00

PDF ver.

ISBN: 9789264491410

\$61.00



Print ver.

Code: gov-2022-404-en-print

ISBN: 9789264785793

pages: 150 \$42.00

PDF ver.

ISBN: 9789264891111

\$25.00



Print ver.

Code: gov-2022-481-en-print

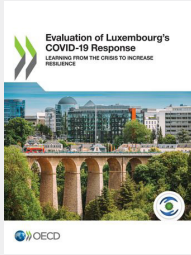
ISBN: 9789264321533

pages: 120 \$36.00

PDF ver.

ISBN: 9789264620469

\$21.00



Print ver.

Code: gov-2022-417-en-print

ISBN: 9789264539358

pages: 250 \$72.00

PDF ver.

ISBN: 9789264931817

\$43.00



Print ver.

Code: gov-2022-504-en-print

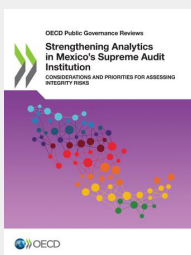
ISBN: 9789264346345

pages: 80 \$30.00

PDF ver.

ISBN: 9789264750128

\$18.00



Print ver.

Code: gov-2022-177-en-print

ISBN: 9789264650671

pages: 60 \$30.00

PDF ver.

ISBN: 9789264553880

\$18.00

Governance

Evaluation of Luxembourg's COVID-19 Response Learning from the Crisis to Increase Resilience

As countries seek to learn from the COVID-19 crisis and increase their resilience for the future, evaluations are important tools to understand what worked or not, why and for whom. This report is the first of its kind. It evaluates Luxembourg's responses to the COVID-19 crisis in terms of risk preparedness, crisis management, as well as public health, education, economic and fiscal, and social and labour market policies. While Luxembourg's response to the pandemic has been particularly agile, preserving the country's resilience will require maintaining high levels of trust in government, reducing inequalities, and laying the foundations for inclusive growth. The findings and recommendations of this report will provide guidance to public authorities in these efforts.

Life-Cycle Costing in Public Procurement in Hungary Stocktaking of Good Practices

This report provides Hungary with key recommendations and policy options to establish comprehensive and user-friendly methodologies and tools for the greater uptake of life-cycle costing (LCC) methodology in public procurement. The report introduces the concept of LCC and its links to the wider sustainable public procurement agenda, and maps the current practices in Hungary and existing LCC tools in other EU and OECD countries, with a view of drawing insights to promote the development and uptake of LCC tools.

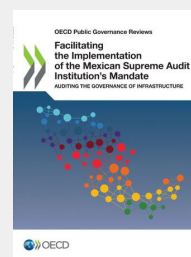
Strengthening Analytics in Mexico's Supreme Audit Institution Considerations and Priorities for Assessing Integrity Risks

This report explores ways for Mexico's supreme audit institution, Auditoria Superior de la Federación (ASF), to strengthen its use of analytics. While the report focuses on the use of data to enhance the detection of integrity risks, it also recognises the implications of better analytics for the ASF's broader digital transformation strategy. It offers a range of proposals for enhancing ASF's data governance and embedding analytics into strategic initiatives. It also looks at building ASF's analytics capacity, including addressing integrity considerations through better co-ordination, digital skills development and nurturing a data-centric culture.

Governance

Facilitating the Implementation of the Mexican Supreme Audit Institution's Mandate Auditing the Governance of Infrastructure

To support Mexico's supreme audit institution, the ASF (Auditoría Superior de la Federación), in fulfilling its mandate, this report analyses good practices in OECD countries for incorporating governance issues into public works audits. It provides examples and assesses different strategic considerations for ASF's infrastructure audit organisation and practices, including objectives and resources. Finally, it analyses infrastructure auditing practices in the context of emergencies.



Print ver.

Code: gov-2022-178-en-print

ISBN: 9789264832756

pages: 45 \$30.00

PDF ver.

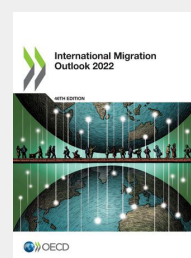
ISBN: 9789264649682

\$18.00

Social issues/Migration/Health

International Migration Outlook 2022

The 2022 edition of International Migration Outlook analyses recent developments in migration movements and the labour market inclusion of immigrants in OECD countries. It also monitors recent policy changes in migration governance and integration in OECD countries. This edition includes a special chapter on the policy responses by OECD countries to the large inflow of refugees from Ukraine as well as a series of three short chapters on international students analysing respectively recent trends, attraction and retention policies as well as the economic impact of international students. The Outlook also includes country notes and a detailed statistical annex.



Print ver.

Code: els-2022-671-en-print

ISBN: 9789264684126

pages: 450 \$132.00

PDF ver.

ISBN: 9789264867673

\$79.00

Modernising Social Services in Spain Designing a New National Framework

Social services in Spain are confronted with a series of challenges, including growing demand due to population ageing, changing family models, rising inequality and labour market changes. Services are fragmented and, with multiple providers, lack reliable and comprehensive data. There is also a discontinuity between primary and specialised care. The decentralised model of competences generates complexity in management and financing of services. With the current governance and financing system, there are disparities in the type and quality of social services provided across the 17 Spanish Autonomous Communities and two autonomous cities. In addition, there is a lack of portability of benefits throughout the country. This report suggests ways to improve the legal context, move towards more universal services, strengthen quality, and move towards more evidence-based policies.



Print ver.

Code: els-2022-682-en-print

ISBN: 9789264457751

pages: 140 \$42.00

PDF ver.

ISBN: 9789264487154

\$25.00



Print ver.

Code: els-2022-677-en-print

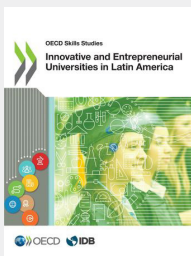
ISBN: 9789264574137

pages: 79 \$30.00

PDF ver.

ISBN: 9789264488540

\$18.00



Print ver.

Code: cfe-2022-452-en-print

ISBN: 9789264332256

pages: 105 \$30.00

PDF ver.

ISBN: 9789264928114

\$18.00

Social issues/Migration/Health

The Role of Firms in the Gender Wage Gap in Germany

This review contributes to a better understanding of the gender wage gap in Germany and puts forward key elements of a policy package to reduce gender pay gaps. It provides a detailed analysis of the role of firms in the gender wage gap by focusing on the pay gap between similarly skilled men and women between and within firms. The within-firm component captures differences in pay between men and women within firms related to differences in tasks and responsibilities, or differences in pay for work of equal value (e.g. bargaining, discrimination). The between-firm component captures the role of differences in pay between firms (unrelated to workforce composition) due to the tendency of women to work in low-wage firms. The review analyses gender differences in job mobility and the earnings consequences of career breaks following childbirth to shed light on the evolution of the gender wage gap across the working life. To put results for Germany in context, they are systematically benchmarked to those of four nearby countries (i.e. Denmark, France, the Netherlands and Sweden). The policy discussion extends the empirical analysis by putting forward a comprehensive policy package with an emphasis on policies targeted at firms.

Education

Innovative and Entrepreneurial Universities in Latin America

The review examines how higher education institutions are supporting innovation and entrepreneurship in their surrounding communities. The study focuses on eleven universities located in six countries in Latin America: Chile, Colombia, Mexico, Brazil, Argentina and Uruguay.

The study finds that selected institutions are actively supporting entrepreneurs (university students, but also local entrepreneurs) through courses, incubation and acceleration activities. It also shows that universities are actively engaging with external stakeholders in their surrounding communities, to spur innovation through joint-research, organisation of events (such as festivals, competition). It finds that that while COVID-19 pandemic brought about some challenges, universities managed to stay afloat and keep a steady stream of support to entrepreneurs and partners. The review also illustrates the challenges that universities face when developing these activities (lack of funding, unclear regulation for intellectual property development, etc.) and highlights some opportunities that universities should leverage, particularly in the current context.

Education

Improving Early Equity From Evidence to Action

Early equity for disadvantaged children can be achieved through nurturing, high quality early learning environments. However, without deliberate action, disadvantaged children face a 12 month development gap compared to their more advantaged peers in key early learning areas such as emergent literacy. Data based on direct assessments from 7,000 children in England, Estonia and the United States show what it takes to achieve a level playing field for disadvantaged children. These actions include supporting parents to regularly read with their children, having back-and-forth conversations and providing access to developmentally appropriate books. Links between parents and their early childhood education and care (ECEC) centre are also positively linked to children's early development, as well as the provision and quality of ECEC. The latter includes a holistic approach to ensure children's social-emotional skills are fostered, such as curiosity and co-operation, and ensuring children have a level of autonomy over their activities.

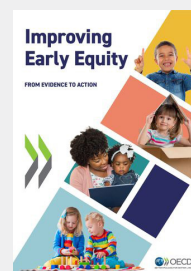
Employment

Skills for the Digital Transition Assessing Recent Trends Using Big Data

This report presents the most recent trends in the labour market demand for digital professionals and skills, highlighting where bottlenecks are emerging and policy action is – and will be – needed to support individuals who aim to thrive in the digital transition. The report analyses a wide range of digital occupations and the associated skill and technology demands using a unique set of data collected from millions of job postings published online in Belgium, Canada, France, Germany, Italy, the Netherlands, the United Kingdom, the United States, Singapore and Spain. The evidence contained in this report is key for governments to design targeted retraining and upskilling policies, and for workers to fully benefit from the digital transition.

Disability, Work and Inclusion Mainstreaming in All Policies and Practices

One in seven working-age adults identifies as having a disability in OECD countries, a share that is also substantial and growing among young people (8% in 2019). Many of them are excluded from meaningful work and have low levels of income and social engagement. This report documents the current labour market situation of people with disability, who continue to face large employment, unemployment and poverty gaps compared with people without disability. The report concludes that the goal set up some twenty years ago of making disability policies pro-active and employment-oriented has not been achieved. In particular, key areas of disability policy have received too little attention so far, such as policies to support young people with disability, improve the skills of people with disability, and intervene early in the course of a health problem or disability. The report calls for rigorous disability mainstreaming in all relevant policies and practices as the missing link to better labour market inclusion.



PDF ver.

Code: edu-2022-805-en-pdf

ISBN: 9789264736535

\$30.00



Print ver.

Code: els-2022-681-en-print

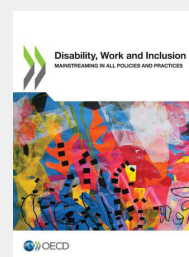
ISBN: 9789264520578

pages: 110 \$30.00

PDF ver.

ISBN: 9789264396067

\$18.00



Print ver.

Code: els-2022-668-en-print

ISBN: 9789264596597

pages: 260 \$78.00

PDF ver.

ISBN: 9789264941472

\$46.00



Print ver.

Code: cfe-2022-489-en-print

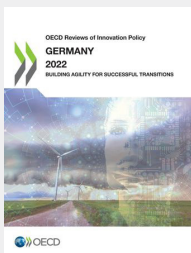
ISBN: 9789264616585

pages: 206 \$60.00

PDF ver.

ISBN: 9789264443891

\$36.00



Print ver.

Code: sti-2022-6-en-print

ISBN: 9789264315662

pages: 320 \$96.00

PDF ver.

ISBN: 9789264958876

Free

Industry and Services

Financing Growth and Turning Data into Business Helping SMEs Scale Up

Small and medium-sized enterprises (SMEs) that scale up have long raised policy interest for their extraordinary potential in terms of job creation, innovation, competitiveness and economic growth. Yet, little is known about which firms could effectively become scalers, and what policies could effectively promote SME growth. This report is part of a series aiming to help policy makers unleash scalers' potential. Building on new evidence from microdata work, it rethinks the nature and scope of scale up policies, suggesting the need for a broader and more cross cutting approach. The report then explores two thematic areas that are relevant for SME scaling up, i.e. SME data governance and their access to 'scale up' finance. Based on an international mapping of 419 institutions and 1194 policy initiatives across OECD countries, the analysis shows that SME and entrepreneurship policy is not among the core mandates of many implementing institutions, calling for sound coordination across the board and further mainstreaming of SME growth considerations in both policy areas. Moreover, national policy mixes vary significantly across countries, reflecting different approaches to promoting SME growth and to SME targeting, but also revealing possible policy blind spots.

Science and Technology

OECD Reviews of Innovation Policy: Germany Building Agility for Successful Transitions

The German economy is underpinned by one of the most advanced innovation systems in the world. Yet, the innovation system nevertheless faces a number of challenges: weak innovative business dynamics, difficulties in transferring new ideas and research into the private sector, and inclusion divides in the STI system. The green and digital transitions have created additional challenges for the German economy and the innovative Mittelstand that powers it. The sustainability goals of the German government, as well as the changing expectations of consumers in many of Germany's key industries, requires fundamental changes to how and what the German innovation system does. The government is aware of these challenges and is taking action. This Review looks at key challenges and opportunities facing the German innovation system, including resilience in innovative value chains, weak conditions for disruptive and breakthrough innovation, and insufficient coordination across the STI system. The Review presents recommendations on how, building upon its historical strengths, the government can ensure the future competitiveness and sustainability of the German economy. Given the internationally shared challenges of supporting transitions, the insights presented in the Review will be of interest to policymakers, stakeholders and analysts from Germany and across the OECD.

Agriculture and Food

Making Agri-Environmental Payments More Cost Effective

Agri-environmental payment schemes which operate as voluntary programmes that pay farmers to achieve certain environmental criteria have gained increasing interest and popularity amongst policy makers and farmers. There is growing evidence, however, that the majority of such schemes that have been implemented have had little environmental effectiveness. Building on past OECD work, this report identifies and discusses “best practice” design principles for cost-effective agri-environmental payment schemes. To this end, the report reviews the literature, develops a Policy Spectrum Framework that classifies payment types based on key design features for achieving cost-effective outcomes, and presents policy simulations undertaken to assess the cost-effectiveness of different payment designs and a multi-country choice experiment conducted with farmers to explore their preferences for different types of payments, ranging from practice-based to results-based payments.

Environment

OECD Guidance on Transition Finance Ensuring Credibility of Corporate Climate Transition Plans

This guidance sets out elements of credible corporate climate transition plans, which aim to align with the temperature goal of the Paris Agreement. Such plans are needed to address the growing risk of greenwashing in transition finance and facilitate a global, whole-of-economy climate transition. Based on extensive stakeholder consultations, including an industry survey, the guidance provides market actors, policy makers, and regulators with a comprehensive overview of existing transition finance approaches, identifying the main challenges and solutions. The guidance is relevant to: (i) policy-makers and regulators seeking to develop or revise relevant policy frameworks or regulations; (ii) corporates developing transition plans and seeking to identify the most salient elements of existing initiatives; and (iii) financial market participants planning to provide finance for the implementation of net-zero strategies. The guidance emphasises greater transparency, comparability and granularity in corporate transition plans, and the need for adequate environmental and social safeguards. In light of challenges for some corporates, especially in emerging markets and developing economies, and the risk of excluding key actors from transition finance, the guidance highlights the need for policy-makers to take stronger action to bolster domestic enabling environments for transformative investments.



Print ver.

Code: tad-2022-521-en-print

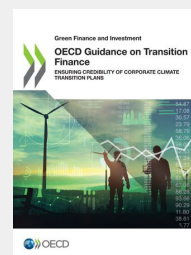
ISBN: 9789264830554

pages: 125 \$36.00

PDF ver.

ISBN: 97892644475342

\$21.00



Print ver.

Code: env-2022-397-en-print

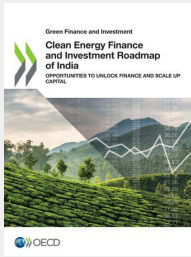
ISBN: 9789264338630

pages: 100 \$30.00

PDF ver.

ISBN: 9789264820593

\$18.00



Print ver.

Code: env-2022-395-en-print

ISBN: 9789264465541

pages: 90 \$30.00

PDF ver.

ISBN: 9789264656574

\$18.00



Print ver.

Code: env-2022-396-en-print

ISBN: 9789264690035

pages: 196 \$54.00

PDF ver.

ISBN: 9789264749641

\$32.00



Print ver.

Code: env-2022-389-en-print

ISBN: 9789264972278

pages: 108 ¥\$30.00

PDF ver.

ISBN: 9789264352872

\$18.00

Environment

Clean Energy Finance and Investment Roadmap of India Opportunities to Unlock Finance and Scale up Capital

India has achieved major progress in its energy sector over the last two decades. Still, investment needs to scale up considerably to meet the government's ambitions to achieve 500 GW of renewable energy capacity and energy-intensity reductions of 45% by 2030. Targeted application of public funds, alongside international climate and development finance, can crowd in investors and channel private capital to meet India's clean energy goals. The Clean Energy Finance and Investment Roadmap of India highlights key actions needed to accelerate the development of energy efficiency measures in micro, small and medium enterprises, offshore wind and green hydrogen production. The report provides a comprehensive overview of the initiatives to date and challenges to scale up investments. It also provides a number of tailored recommendations for the Government of India, development partners and the private sector.

Redesigning Ireland's Transport for Net Zero Towards Systems that Work for People and the Planet

Current mobility patterns in Ireland are incompatible with the country's target to halve emissions in the transport sector by 2030. While important, electrification and fuel efficiency improvements in vehicles are insufficient to meet Ireland's ambitious target: large behavioural change in the direction of sustainable modes and travel reductions are needed. Such changes will only be possible if policies can shift Irish transport systems away from car dependency. Building on the OECD process "Systems Innovation for Net Zero" and extensive consultation with Irish stakeholders, this report assesses the potential of implemented and planned Irish policies to transform car-dependent systems. It identifies transformative policies that can help Ireland transition to sustainable transport systems that work for people and the planet. It also provides recommendations to scale up such transformative policies and refocus the electrification strategy so that it fosters, rather than hinders, transformational change.

Green Economy Transition in Eastern Europe, the Caucasus and Central Asia Progress and Ways Forward

Since the 1990's, the countries of Eastern Europe, the Caucasus and Central Asia (EECCA) have made great progress in pursuing economic development that is also environmentally sustainable. The countries, in collaboration with the GREEN Action Task Force hosted by the OECD, has developed a number of policies aiming to improve environmental quality and social well-being, while creating opportunities for strong economic growth and decent jobs in the region.

This report was prepared as the OECD contribution to the ninth "Environment for Europe" (EfE) Conference (5-7 October 2022). In this context, this report aims to: (i) take stock of progress on policy developments towards a green economy in the EECCA countries; (ii) showcase selected contributions from of the Green Action Task Force that integrate environmental and climate considerations into development pathways of the EECCA countries, and mobilise finance for action; and (iii) provide an outlook for the future, including priority actions that the Task Force in co-operation with the EECCA countries should take to enhance the momentum for green economy transition in the region.

Development

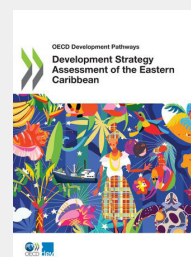
Development Strategy Assessment of the Eastern Caribbean

Eastern Caribbean countries enjoy rich natural endowments and have achieved significant economic development. Throughout the last decades, they have also been confronted with a number of rising economic, social and environmental challenges. To help them tackle these, and accelerate their development, the Organisation of Eastern Caribbean States (OECS) and the OECD have jointly designed a regional strategy scorecard, which is at the heart of the Development Strategy Assessment of the Eastern Caribbean.

The scorecard will help policy makers set priorities for the implementation of the OECS Development Strategy. Stronger resilience and capacity are the major guideposts towards both economic growth and social progress. The region can make much more of its green potential, with power generation topping the list. Improving regulation and reducing red tape can foster new, homegrown economic dynamism. Tourism, digital services and the sustainable ocean economy also offer untapped potential. Closing the skills gap, enhancing the quality of education and improving social protection are essential. Finally, as a red thread throughout, deeper regional integration would make it easier for OECS countries to pool resources in a range of areas, radically increasing the region's potential for efficient governance, and accelerating the development of its human resources.

FDI Qualities Guide for Development Co-operation Strengthening the Role of Development Co-operation for Sustainable Investment

This guide provides a framework to strengthen the role of development co-operation for mobilising foreign direct investment (FDI) and enhancing its positive impact in developing countries. The guide reviews a broad range of financial and technical solutions for enhancing the impact of FDI on sustainable development, and outlines ways donors can consider the impact of FDI on their strategies, thus supporting the design, implementation and monitoring of FDI-related assistance.



Print ver.

Code: dev-2022-401-en-print

ISBN: 9789264885851

pages: 160 \$54.00

PDF ver.

ISBN: 9789264684744

\$32.00



Print ver.

Code: daf-2022-190-en-print

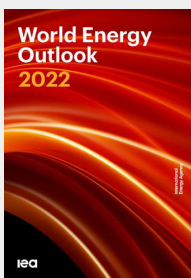
ISBN: 9789264939325

pages: 60 \$30.00

PDF ver.

ISBN: 9789264848726

\$18.00

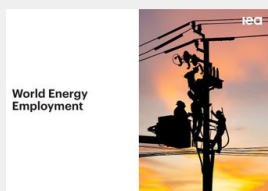


PDF ver.

Code: [iea-2022-111-en-pdf](#)

ISBN: 9789264425446

pages: 524 Free



PDF ver.

Code: [iea-2022-121-en-pdf](#)

ISBN: 9789264338241

pages: 63

Energy

World Energy Outlook 2022

With the world in the midst of the first global energy crisis – triggered by Russia’s invasion of Ukraine – the World Energy Outlook 2022 (WEO) provides indispensable analysis and insights on the implications of this profound and ongoing shock to energy systems across the globe.

Based on the latest energy data and market developments, this year’s WEO explores key questions about the crisis: Will it be a setback for clean energy transitions or a catalyst for greater action? How might government responses shape energy markets? Which energy security risks lie ahead on the path to net zero emissions?

The WEO is the energy world’s most authoritative source of analysis and projections. This flagship publication of the IEA has appeared every year since 1998. Its objective data and dispassionate analysis provide critical insights into global energy supply and demand in different scenarios and the implications for energy security, climate targets and economic development.

World Energy Employment

The inaugural edition of the World Energy Employment Report is – to the best of our knowledge – the first comprehensive inventory of the global energy workforce.

The report presents new estimates of the size and distribution of the labour force, across regions and technologies, and increases the granularity on the number of workers along the entire energy value chain. This includes fossil fuel and bioenergy production; power sector generation, transmission, distribution and storage; and end uses, including vehicles and energy efficiency for buildings and industry. It also details segments of the value chain where these jobs are located, including raw materials, manufacturing, construction, utilities, and wholesale, as well as how many are employed for building new projects versus operating existing energy facilities, which includes those working in operating and maintenance of plants. It also provides estimates for emerging segments for energy, including clean energy innovation.

This mapping can serve as a much-needed foundation for global energy decision makers, and provides important insights about the potential opportunities and impacts to labour markets under different drivers, particularly the transitions to clean energy, as well as shifting or development of supply chain capacities. How these labour markets evolve will be explored in depth by scenarios presented in our World Energy Outlook series.

Energy

Global Hydrogen Review 2022

The Global Hydrogen Review is an annual publication by the International Energy Agency that tracks hydrogen production and demand worldwide, as well as progress in critical areas such as infrastructure development, trade, policy, regulation, investments and innovation.

The report is an output of the Clean Energy Ministerial Hydrogen Initiative and is intended to inform energy sector stakeholders on the status and future prospects of hydrogen while also informing discussions at the Hydrogen Energy Ministerial Meeting organised by Japan. Focusing on hydrogen's potentially major role in meeting international energy and climate goals, this year's Review aims to help decision makers fine-tune strategies to attract investment and facilitate deployment of hydrogen technologies while also creating demand for hydrogen and hydrogen-based fuels. It compares real-world developments with the stated ambitions of government and industry.

This year's report includes a special focus on how the global energy crisis sparked by Russia's invasion of Ukraine has accelerated the momentum behind hydrogen and on the opportunities that it offers to simultaneously contribute to decarbonisation targets and enhance energy security.

An Energy Sector Roadmap to Net Zero Emissions in Indonesia

Indonesia is the world's fourth-most populous country and is set to become the world's fourth-largest economy by mid-century. The choices that Indonesia makes now and in the decades to come will have a significant bearing on the world's energy markets and on international efforts to reach collective climate goals.

Indonesia, a member of the IEA family since 2015, has committed to reach net zero emissions by 2060 or before – an ambitious task given the country's growth objectives and status as a globally important consumer and producer of coal. However, with a transition to net zero offering extensive and varied economic opportunities, Indonesia is beginning to put in place the policies and frameworks that can help reach this target while moving towards advanced economy status.

To assist in this critical task, the IEA – at the request of the Government of Indonesia and to coincide with Indonesia's Presidency of the G20 – has developed a comprehensive roadmap to net zero by 2060 for the country, which charts a path for the country's energy transition over the coming decades. The analysis in the Energy Sector Roadmap to Net Zero Emissions in Indonesia spans key areas such as people-centred transitions, the phasing down of coal use, investment and financing needs, and critical minerals. It also sets out a high-ambition pathway in which Indonesia reaches net zero by 2050. The project has been conducted in close collaboration with the Ministry of Energy and Mineral Resources of the Republic of Indonesia.



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Code: [iea-2022-115-en-pdf](#)

ISBN: 9789264920835

pages: 284 Free

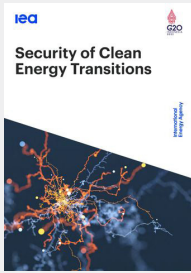


PDF ver.

Code: [iea-2022-114-en-pdf](#)

ISBN: 9789264691537

pages: 232 Free

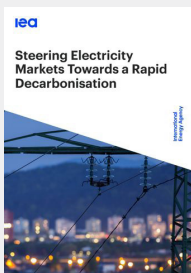


PDF ver.

Code: [iea-2022-118-en-pdf](#)

ISBN: 9789264473584

pages: 49 Free



PDF ver.

Code: [iea-2022-119-en-pdf](#)

ISBN: 9789264457126

pages: 115 Free

Energy

Security of Clean Energy Transitions

This report examines the evolving challenges of maintaining energy security in the context of clean energy transitions on the pathway to net zero emissions. The report reflects on the security implications of the triple global crisis, the climate emergency, the global energy crisis and the social and economic implications of the Covid-19 pandemic.

The report highlights key energy security concerns during energy transitions and provides governments, notably within the Group of Twenty (G20), with policy recommendations for maintaining and improving energy security, while accelerating clean energy transitions to address the triple crises. In the context of Indonesia's G20 Presidency, the Ministry of Energy and Mineral Resources invited the International Energy Agency (IEA) to produce a second edition of its Security of Clean Energy Transitions report, the first having been published in 2021, building on the G20 Naples Principles.

In the run up to the Bali G20 Energy Transitions Ministerial in September 2022, this report is intended to support discussions among the G20 countries and further elaborate on the G20 Naples Principles, agreed at the G20 energy ministers' meeting in Naples in 2021, by providing analysis, insights and recommendations.

Steering Electricity Markets Towards a Rapid Decarbonisation

Achieving net zero emissions by 2050 will require a significant reduction in electricity sector emissions, with around half of these coming from systems that currently have liberalised electricity markets. In order to support a rapid decarbonisation of power systems, the design of these markets will need to evolve to ensure that they maximise the value delivered by existing and new low-carbon technologies. When policymakers design electricity markets, they need to consider the interactions between all parts of the market including wholesale, retail and capacity markets. At the same time, it is essential to ensure synergies with low-carbon investment frameworks and other decarbonisation policies.

This report identifies key principles for designing different parts of the market based on evidence from electricity markets globally and provides actionable guidelines to help policy makers match decarbonisation pledges with actions. With short-term wholesale markets as the starting point for generating efficient price signals, the report systematically considers the different parts of electricity markets, perspectives for integrating technologies such as distributed resources and storage, and how the design process fits with other decarbonisation policies and system planning. The principles derived from this analysis provide policy makers with market design tools in the context of new technologies and low-carbon transitions.

Energy

The Breakthrough Agenda Report 2022 Accelerating Sector Transitions Through Stronger International Collaboration

The Breakthrough Agenda Report 2022 is a new report by the International Energy Agency (IEA), the International Renewable Energy Agency (IRENA) and the UN Climate Change High-Level Champions, focused on supporting stronger international collaboration to drive faster reductions in global greenhouse gas emissions. Without international cooperation, the crucial global transition to net zero emissions could be delayed by decades. The faster the transition advances, the faster it will deliver clean technologies at lower cost, making them available for all. This is all the more urgent in the context of recent sharp spikes in energy and food prices around the world.

This inaugural report assesses progress on reducing emissions in five key sectors – power, hydrogen, road transport, steel and agriculture. The authors make recommendations to strengthen collaboration between governments, business and civil society in areas such as common standards, technology R&D, reaching a level playing field for trade, and improving technical and financial assistance.

This is a first-of-its-kind annual progress report, requested by world leaders at the UN Climate Change Conference COP26 in November 2021 as part of the launch of the Breakthrough Agenda. The Breakthrough Agenda currently covers more than two-thirds of the global economy, with endorsement from 45 world leaders, including those of the G7, China and India. The report is designed to inform policy makers, business leaders and civil society organisations of the most urgent ways to strengthen collaboration in and across major emitting sectors ahead of the Global Clean Energy Action Forum in Pittsburgh in September 2022, the next UN Climate Change Conference COP27 in Sharm El-Sheikh, Egypt, and beyond.

Kazakhstan 2022 Energy Sector Review

This in-depth review of the energy policies of Kazakhstan follows the same format used by the International Energy Agency (IEA) to review member countries. It was conducted under the auspices of the EU4Energy programme, which is being implemented by the IEA and the European Union, along with the Energy Community Secretariat and the Energy Charter Secretariat.

Kazakhstan has made ambitious commitments to reduce greenhouse gas emissions and increase the role of renewables in its energy supply, but dependence on large reserves of inexpensive domestic coal and a lack of flexible generating capacity make these a challenge. Oil continues to provide much of the country's export earnings and government revenue, while many oil-importing countries have pledged to reduce consumption of fossil fuels, and most oil exports currently transit the Russian Federation. Low domestic energy prices are a social priority for the government, but have made it difficult to promote energy efficiency and stimulate commercial production of gas for the domestic market.

This report assesses the energy sector and related challenges facing Kazakhstan and proposes policy recommendations to improve sector governance, energy efficiency and security of supply.



PDF ver.

Code: [iea-2022-120-en-pdf](#)

ISBN: 9789264437401

pages: 183 Free



PDF ver.

Code: [iea-2022-116-en-pdf](#)

ISBN: 9789264608184

pages: 149 Free



PDF ver.

Code: [iea-2022-112-en-pdf](#)

ISBN: 9789264526884

pages: 131 Free

Energy

Tajikistan 2022 Energy Sector Review

This International Energy Agency (IEA) energy sector review of Tajikistan was conducted under the auspices of the EU4Energy programme, which is being implemented by the IEA and the European Union, along with the Energy Community Secretariat and the Energy Charter Secretariat.

With abundant water potential from its rivers, natural lakes and glaciers, Tajikistan is almost exclusively reliant on hydro for electricity generation. It is home to some of the world's largest hydropower plants and is ranked eighth in the world for hydropower potential with an estimated 527 terawatt-hours (TWh). Currently only 4% of the country's hydro potential is exploited. Tajikistan's geographic proximity to some of the world's fastest-growing energy markets means that investing in developing its hydropower potential can contribute to regional energy security and the clean energy transition, in addition to addressing Tajikistan's high vulnerability to climate change and natural disasters.

Coupled with the IEA roadmap on cross-border electricity trading for Tajikistan, published in October 2021, this report aims to give a holistic overview of Tajikistan's energy sector and to assist policy making at all levels in order to facilitate the effective delivery of the National Development Strategy for 2030 and its ambitious goals, which include increasing hydropower generation capacity by 10 gigawatts and raising annual electricity exports by 10 TWh. It also supports government efforts for ongoing energy sector reforms, aimed at restructuring the state-owned vertically integrated electric utility with financial viability issues, introducing market mechanisms to alleviate power sector challenges and updating its regulatory and tariff regimes.

The report commends the government of Tajikistan for setting clear goals for its national development strategy and the subsequent sectoral development programmes, caveats the introduction of domestic coal as a key support for national energy security structures, and advocates for the introduction of other renewable sources and enhanced regional co operation for achieving energy security and sustainable development goals.

Energy

Uzbekistan 2022 Energy Policy Review

Uzbekistan's broad economic reforms were expanded to cover energy in 2019 when the government launched a multiphase transition from the state-owned and -operated and subsidised energy sector model to competitive gas, oil and electricity markets with significant private-sector participation and cost-covering energy prices.

The reform plans to diversify the country's energy supply, which domestic natural gas continues to dominate in all sectors, including transport. Natural gas exports will be phased out by 2025 and the gas will be used increasingly to expand petrochemicals production, while Uzbekistan's significant but unexploited solar and wind resources will be harnessed to help build a cleaner power sector to 2030. While energy use per capita is low, the country's economy remains one of the most energy-intensive in the world, and massive potential remains to improve energy efficiency through incentives and mandates.

This report is intended to help guide Uzbekistan towards a more secure, sustainable and efficient energy future. It proposes several ways to support the government in its reform efforts. The gradual transition to competitive markets and withdrawal of subsidies should be accompanied by support measures for those most in need. For the reform to succeed, an independent and well-resourced energy regulator is also necessary. Furthermore, the financial imbalances in the state-owned energy companies must be addressed and their re emergence avoided.

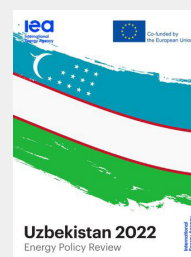
For the long term, as Uzbekistan's population, cities and economy are projected to grow strongly, a cross-sectoral approach is required to limit the increase in energy demand and energy-related greenhouse gas emissions.

Moldova 2022 Energy Policy Review

Moldova is largely dependent on fossil fuel and electricity imports, with the vast majority of its natural gas imports coming from the Russian Federation. Moldova has made considerable efforts to diversify their supply sources and increase the security of both electricity and gas supply. Further integration with Europe for both gas and electricity imports is ongoing as Moldova prioritises moving away from Russian sources of energy. The March 2022 emergency synchronisation with ENTSO-E, triggered by Russia's invasion of Ukraine, has pushed Moldova closer to full electricity trade with Europe.

Since Moldova signed an Association Agreement with the European Union in 2014, it has been working to adopt core EU legislation. Moldova's National Energy Strategy for 2030 reflects this work, with key government priorities including: ensuring the security of energy supply; further developing competitive markets and integration on a regional and European level; and ensuring the sustainability of the energy sector while mitigating the effects of climate change. Increasing the share of renewables in Moldova's energy mix remains key to meeting the country's priorities as it aims to enhance regional and European integration.

This report assesses the energy sector and the related challenges facing Moldova, and it proposes policy recommendations to improve energy security, support the development of free and competitive energy markets, and accelerate its transition to a more sustainable, clean and efficient energy system.



PDF ver.

Code: [iea-2022-113-en-pdf](#)

ISBN: 9789264486409

pages: 154 Free



PDF ver.

Code: [iea-2022-117-en-pdf](#)

ISBN: 9789264986572

pages: 186 Free

