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Economics

OECD Economic Surveys: Korea 2022

Sound health management and supportive policies helped Korea emerge swiftly from the pandemic. The recovery is set to continue as pandemic-era restrictions on contact-intensive services are shelved, despite the Russia-Ukraine war raising inflation and highlighting the need to increase supply chain resilience. Reducing dependence on fossil fuels can boost resilience, but is also necessary to reach ambitious climate targets. Fiscal policy support will need to be scaled back and should focus on supporting people and business dynamism rather than firm survival. The productivity gap between small and large, highly productive companies is reflected in labour market dualities of income, job quality and social protection. Gaps in the social safety net largely follow the same fault lines, and a large share of elderly are left with very low retirement income. These inequalities spur fierce competition among young men and women to enter prestigious universities and good jobs and slows down youth's labour market entry and family formation against a backdrop of a very low fertility rate.

SPECIAL FEATURES: SOCIAL SAFETY NET, YOUTH EMPLOYMENT

OECD Economic Surveys: Chile 2022

Chile's economy recovered swiftly from the pandemic on the back of exceptionally strong policy support, which eventually led to a significant overheating of the economy. Inflation has risen amid buoyant private consumption, further aggravated by the Russian aggression on Ukraine. Monetary authorities have acted swiftly to contain inflation, and the fiscal stimulus is being withdrawn. Looking ahead, main challenges for boosting productivity and investment include strengthening competition, reducing regulatory barriers and spending more on research and innovation, while pressing social needs call for more attention to how incomes and opportunities are distributed. Around a third of the workforce is in informal work, which limits their access to social protection benefits. Ensuring a well-defined set of benefits for all, with no distinction between formal and informal workers, will be key. Expanding access to high-quality early childhood education would improve educational outcomes and allow more women to work. Environmental challenges and risks loom large, but also provide significant opportunities for the future. The current high fossil content of the energy matrix contrasts with Chile's strong potential in renewable energy generation.

SPECIAL FEATURES: RAISING PRODUCTIVITY, EXPANDING SOCIAL PROTECTION, REDUCING LABOUR INFORMALITY



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Economics

OECD Economic Outlook, Interim Report September 2022

The world is paying a high price for Russia's war of aggression against Ukraine. The high humanitarian cost continues to grow and the global economic outlook has darkened further.

This Interim Report focuses on the effects of the war on the world economy and the energy crisis. With the impacts of the COVID-19 pandemic still lingering, the war is dragging down growth more than anticipated. Inflation has intensified and become widespread across countries and consumer items. The risk of energy disruptions has risen. The Interim Report is an update on the assessment in June 2022 issue of the OECD Economic Outlook (Number 111).

Finance & Investment

OECD Competition Assessment Reviews: Brazil

This review provides an analysis of regulatory barriers to competition in Brazil, specifically in the ports and civil aviation sectors, and makes recommendations for Brazilian authorities to mitigate harm to competition and foster long-lasting growth. It is based on a competition assessment conducted by the OECD in co-operation with the Brazilian Competition Authority (CADE) identifying rules and regulations that may hinder the competitive and efficient functioning of markets in the two sectors under review. The review also includes estimates of the impact that the implementation of certain specific recommendations could have on the economy.

Climate Finance Provided and Mobilised by Developed Countries in 2016-2020

Insights from Disaggregated Analysis

This report provides disaggregated data analysis of climate finance provided and mobilised in 2016-2020 across climate finance components, themes, sectors, and financial instruments. It also explores key trends and provides insight relating to the distribution and concentration of climate finance provided and mobilised across different developing country characteristics and groupings. The concluding chapter of the report provides further insights on the impacts and effectiveness of climate finance, as well as meaningful mitigation action and transparency on implementation. The findings complement the OECD report Aggregate Trends of Climate Finance Provided and Mobilised by Developed Countries in 2013-2020.

Taxation

Tax Morale II

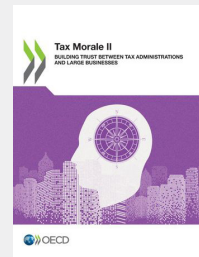
Building Trust between Tax Administrations and Large Businesses

The issue of trust between Multinational Enterprises (MNEs) and tax administrations is a vital part of the tax system, but relatively little studied. Building on previous OECD research on tax morale, which measures taxpayer perceptions and attitudes towards paying and evading taxes, this report presents new data on how tax administrations perceive MNE behaviour towards tax compliance. With a particular focus on the challenges facing developing countries, this report brings together this data with previous data on MNE perceptions, and the outcomes of a series of regional roundtables on tax morale held between tax administrations and MNEs. Having identified a number of challenges around trust, transparency and openness, the report sets out a range of approaches to help build trust, improve communications, and build more effective relationships between taxpayers and tax administrations.

Tax Policy Reforms 2022

OECD and Selected Partner Economies

This is the seventh edition of Tax Policy Reforms: OECD and Selected Partner Economies, an annual publication that provides comparative information on tax reforms across countries and tracks tax policy developments over time. The report covers the tax policy reforms introduced or announced in 71 member jurisdictions of the OECD/G20 Inclusive Framework on Base Erosion and Profit Shifting, including all OECD countries, for the 2021 calendar year. In addition to providing an overview of tax policy reforms, and the macroeconomic and tax revenue context in which measures were introduced, the report also contains a Special Feature that examines government responses to rising energy prices and offers some policy recommendations in the event that prices remain high.



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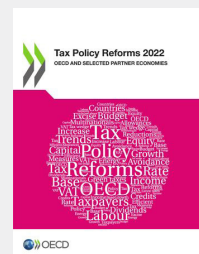
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Taxation

Making Dispute Resolution More Effective – MAP Peer Review Report

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Under BEPS Action 14, members of the OECD/G20 Inclusive Framework on BEPS have committed to implement a minimum standard to strengthen the effectiveness and efficiency of the mutual agreement procedure (MAP). The MAP is included in Article 25 of the OECD Model Tax Convention and commits countries to endeavour to resolve disputes related to the interpretation and application of tax treaties. The BEPS Action 14 Minimum Standard has been translated into specific terms of reference and a methodology for the peer review and monitoring process. The peer review process is

Taxation

conducted in two stages. Stage 1 assesses countries against the terms of reference of the minimum standard according to an agreed schedule of review. Stage 2 focuses on monitoring the follow-up of any recommendations resulting from jurisdictions' Stage 1 peer review report. This report reflects the outcome of the Stage 2 peer monitoring of the implementation of the BEPS Action 14 Minimum Standard by each country.

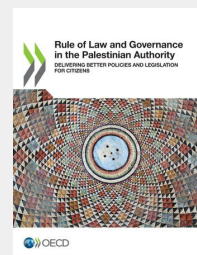
Governance

Rule of Law and Governance in the Palestinian Authority Delivering Better Policies and Legislation for Citizens

Sound policy making and regulatory policy are critical for responsive, efficient government and public service delivery. This report analyses the institutional and policy framework for policy making and regulatory policy in the Palestinian Authority. It includes recommendations for improving the planning and co-ordination of policy making and legislative commitments and for enhancing regulatory and operational guidance for harmonised policy and law development. The first part provides a general analysis of the different stages of policy design, while the second part focusses more specifically on regulatory policy and related impact assessment tools.

Equipping Agile and Autonomous Regulators

Economic regulators are key to the performance of network sectors such as energy, e-communications, transport and water. They regulate and supervise to ensure sectors that can efficiently deliver essential services for the benefit of society. Operating from a unique position in relation to consumers, operators and government, they provide evidence-based and objective decision making that can build trust in the regulatory system and public institutions. A crucial factor in their ability to do this is their governance, including how they are resourced. Resourcing arrangements can make or break regulators' effectiveness. Constraints in their funding or in their autonomy to manage resources may limit regulators' agility or capacity to act. Where these constraints are significant, they may undermine the regulator's ability to fulfil their mandates. This report discusses the implications of funding and staff arrangements for the autonomy, agility, accountability and transparency of regulators in the energy, e-communications, transport and water sectors. It identifies trends, challenges, opportunities and good practices, drawing upon survey responses from 57 economic regulators across 31 countries.



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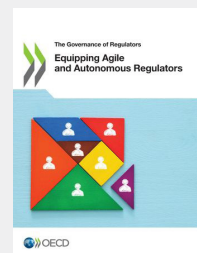
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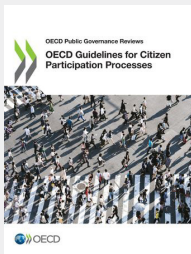


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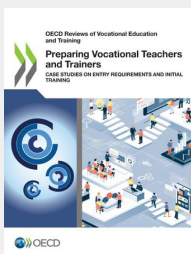


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Governance

Digital Government Review of Luxembourg Driving a Coherent and Sustainable Digital Transformation

Digital government has become a priority for Luxembourg as a means to enable its public sector to deliver more responsive and trusted services. The Digital Government Review of Luxembourg evaluates the efforts made by the government to transition towards a digital government approach. It provides in-depth analysis and policy recommendations to improve institutional governance, digital investments, digital talent and skills, government service delivery and the strategic use of data. Its findings can help Luxembourg achieve a more digitally mature and data-driven administration to better serve citizens and businesses.

OECD Guidelines for Citizen Participation Processes

The OECD Guidelines for Citizen Participation Processes are intended for any public official or public institution interested in carrying out a citizen participation process. The guidelines describe ten steps for designing, planning, implementing and evaluating a citizen participation process, and discuss eight different methods for involving citizens: information and data, open meetings, public consultations, open innovation, citizen science, civic monitoring, participatory budgeting and representative deliberative processes. The guidelines are illustrated with examples as well as practical guidance built on evidence gathered by the OECD. Finally, eight guiding principles are presented to help ensure the quality of these processes.

Education

Preparing Vocational Teachers and Trainers Case Studies on Entry Requirements and Initial Training

Teachers and in-company trainers are central to vocational education and training (VET), as they support the school-to-work transitions of learners from diverse backgrounds. VET teachers develop learners' skills in school-based settings, while in-company trainers support learners during their time in work-based learning. Countries use different strategies to ensure an adequate supply of well-prepared VET teachers and trainers. This report focuses on two aspects: entry requirements for the VET teaching and training profession to ensure quality and consistency; and initial education and training for VET teachers and trainers to ensure that they are well-prepared when taking up their role. It draws lessons from policies and practices in Canada, Denmark, Germany, the Netherlands and Norway for developing a skilled teaching and training workforce through entry requirements and training, while maintaining sufficient flexibility.

Education

Education at a Glance 2022 OECD Indicators

Education at a Glance is the authoritative source for data on the state of education around the world. It provides information on the structure, finances and performance of education systems across OECD countries and partner economies. More than 100 charts and tables in this publication – as well as much more data available online – 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.

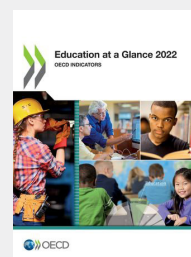
The 2022 edition focuses on tertiary education, looking at the rise of tertiary attainment and the associated benefits for individuals and for societies. It also considers the costs of tertiary education and how spending on education is divided across levels of government and between the state and individuals. A specific chapter is dedicated to the COVID crisis and the shift from crisis management to recovery. Two new indicators on professional development for teachers and school heads and on the profile of academic staff complement this year's edition.

From Learning Recovery to Education Transformation Insights and Reflections from the 4th Survey of National Education Responses to COVID-19 School Closures

Conducted jointly with UNESCO, UNESCO Institute for Statistics (UIS), UNICEF and the World Bank, the fourth round of the Survey on National Education Responses to COVID-19 School Closures took place in April–July 2022. With responses from Ministries of Education in 93 countries, findings show education systems' concerted effort to reach out to students and bring them back to school; the reinforcing of digitalised modes of learning; dialogue with families on the quality and cost-benefits of education; and long-term investments in the resilience of education systems.

Does Higher Education Teach Students to Think Critically?

There is a discernible and growing gap between the qualifications that a university degree certifies and the actual generic, 21st-century skills with which students graduate from higher education. By generic skills, it is meant literacy and critical thinking skills encompassing problem solving, analytic reasoning and communications competency. As automation takes over non- and lower-cognitive tasks in today's workplace, these generic skills are especially valued but a tertiary degree is a poor indicator of skills level. In the United States, the Council for Aid for Education developed an assessment of generic skills called the CLA+ and carried out testing in six countries between 2016 and 2021. This book provides the data and analysis of this "CLA+ International Initiative".



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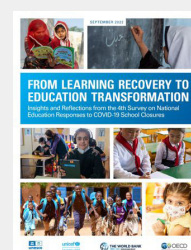
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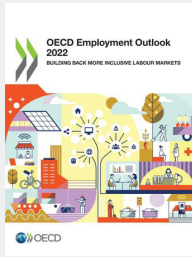
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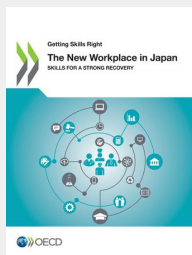
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Employment

OECD Employment Outlook 2022 Building Back More Inclusive Labour Markets

Two years into the pandemic, economic activity has recovered faster than expected. However, the labour market recovery is still uneven across countries and is threatened by the economic fallout from Russia's aggression against Ukraine, which has generated the fastest growing humanitarian crisis in Europe since World War II, sending shockwaves throughout the world economy. The 2022 edition of the OECD Employment Outlook reviews the key labour market and social challenges for a more inclusive post-COVID-19 recovery. It also examines the policies to address these challenges and the outlook ahead. Particular attention is given to frontline workers and groups lagging behind in this recovery (young people, workers with less education, migrants and racial/ethnic minorities). The Outlook also addresses a number of long-standing structural issues that have a key relevance for labour market inclusiveness, such as employer market power and its labour market consequences, the role of firms in wage inequality, and the effect of working time policies on well-being and economic outcomes.

The New Workplace in Japan Skills for a Strong Recovery

In the context of a rapidly changing world of work, the COVID-19 pandemic has heightened pre-existing challenges to Japan's adult learning system and raised new ones. This report examines how skill requirements have been evolving in Japan prior to and during the COVID-19 crisis. It examines changes in the skills composition of Japan's workforce as well as policy efforts to improve the accessibility of career guidance, broaden training participation and foster the adoption of teleworking practices. The report also provides concrete recommendations to tackle inequalities in skills and training among socio-demographic groups. Finally, it provides suggestions for how to develop a labour market information system to feed real-time data into crucial policy and decision-making processes.

Social issues/Migration/Health

OECD Reviews of Pension Systems: Korea

This review provides policy recommendations on how to improve the Korean pension system, building on the OECD's best practices in pension design. It details the key features of the Korean pension system and identifies its strengths and weaknesses based on cross-country comparisons. The Korean pension system consists of a mandatory pay-as-you-go public scheme, occupational schemes and voluntary individual schemes. The review also covers the first layer of old-age social protection in Korea. This review is the eighth in the series of OECD Reviews of Pension Systems.

Science and Technology

Earth's Orbits at Risk The Economics of Space Sustainability

Society's dependence on space infrastructure is at a critical juncture. Public and private actors worldwide are planning to launch tens of thousands of satellites into Earth's orbit in the next five years. This will greatly expand and enrich the use of space resources, but it will also result in more crowded orbits and greater risk of damage from satellite collision and space debris. As satellite launches continue to multiply and concerns grow, the long-term sustainability of space-based infrastructure on orbit and beyond is set to emerge as an increasingly important space policy issue of the 21st century. This publication takes stock of the growing socio-economic dependence of our modern societies on space assets, and the general threats to space-based infrastructure from debris in particular. Notably, it provides fresh insights into the value of space-based infrastructure and the potential costs generated by space debris, drawing on new academic research developed especially for the OECD project on the economics of space sustainability.

Environment

Towards Sustainable Water Services in Estonia Analyses and Action Plan

Despite remarkable improvement in water supply and sanitation services, Estonia faces finance and investment challenges to keep up with social expectations and environmental health regulations. With downward demographic trends expected to affect water utilities revenues and the projected phasing out of EU water funding, which was essential in the rapid improvement of service provision over the last two decades, substantial efficiency gains are required to transition towards sustainable water service provision.

Towards Sustainable Water Services in Estonia presents a strategy and action plan to promote efficiency gains for water supply and sanitation services in Estonia, focusing on the consolidation of service provision. The report provides consolidation scenarios and accompanying measures, including depreciation methods for granted assets, and benchmarking methods going beyond cost comparisons to performance levels and the ambition of development plans. It also shares insights for countries facing similar challenges or seeking to improve the efficiency of water service provision.

The project was undertaken in collaboration with – and with the financial support of the Directorate-General for Structural Reform Support of the European Commission.



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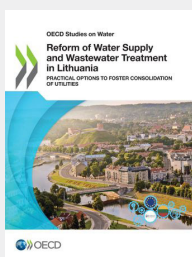
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Environment

Reform of Water Supply and Wastewater Treatment in Lithuania Practical Options to Foster Consolidation of Utilities

Since 2006 Lithuania has taken steps to ensure higher operational efficiency and to reduce the disparity in prices for water supply and sanitation services. However, progress has been slow. Concerns have emerged regarding representation of small municipalities in consolidated utilities and increased costs for some consumers.

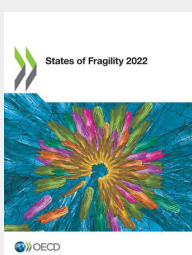
Reform of Water Supply and Wastewater Treatment in Lithuania presents practical options to implement the national strategy towards the consolidation of water supply and sanitation services in Lithuania as a tool to foster operational efficiency and financial sustainability of the sector. Analyses and recommendations benefitted from discussions in two pilot regions in Lithuania, to test the practicality of consolidation scenarios and accompanying measures. Particular attention is paid to tariff setting and different modes of benchmarking – including development plans benchmarking – as tools to incentivise performance. The report provides insights for countries facing similar challenges or seeking to improve the efficiency of water service provision.

The project was undertaken in collaboration with – and with the financial support of – the Directorate-General for Structural Reform Support of the European Commission.

Development

States of Fragility 2022

States of Fragility 2022 arrives during an ‘age of crises’, where multiple, concurring crises are disproportionately affecting the 60 fragile contexts identified in this year’s report. Chief among these crises are COVID-19, Russia's invasion of Ukraine, and climate change, with the root causes of multidimensional fragility playing a central role in shaping their scale and severity. The report outlines the state of fragility in 2022, reviews current responses to it, and presents options to guide better policies for better lives in fragile contexts. At the halfway point of the 2030 Agenda for Sustainable Development, it is more critical than ever for development partners to focus on the furthest behind: the 1.8 billion people in fragile contexts that account for 23% of the world’s population but 73% of the world’s extreme poor.



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Urban, Rural and Regional Development

Enhancing Innovation in Rural Regions of Switzerland

In contrast to falling rates in low density peri-urban and rural remote areas, high density peri-urban areas in Switzerland recorded double the rate of labour productivity growth than the national average. This report examines the Swiss regional innovation system and how it can boost productivity growth in rural regions by enhancing innovation. It also puts a special focus on the agri-food sector to improve the agricultural innovation system.

Unlocking Rural Innovation

This report examines how innovation occurs in rural regions, and suggests alternative indicators beyond science and technology to measure innovation. This new approach reveals that rural places also innovate and identifies some drivers and bottlenecks.

Energy

The energy security case for tackling gas flaring and methane leaks

Russia's unprovoked invasion of Ukraine has had a dramatic impact on the global energy system. Russia was the world's largest oil and natural gas exporter in 2021, and energy markets have been thrown into turmoil, with major energy security and supply risks worldwide.

Substantial gas resources currently are being produced that do not make it to market because they are lost to flaring and leaks across the oil and gas supply chain. This report estimates that nearly 210 billion cubic metres (bcm) of natural gas could be made available to gas markets by a global effort to eliminate non-emergency flaring and reduce methane emissions from oil and gas operations.

If countries that currently export natural gas to the European Union were to implement these two measures, they could increase gas exports by more than 45 bcm using existing infrastructure, equivalent to almost one third of Russian gas exports to the EU in 2021.



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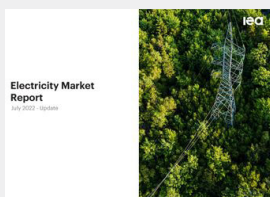


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Energy

Electricity Market Report, July 2022

In the first half of 2022, many electricity markets continued to experience skyrocketing prices, particularly in Europe, reflecting deep uncertainties over both fossil fuel supplies and the economic outlook. Russia's invasion of Ukraine shattered any hope of energy prices declining in the near term following the strong increases seen in the second half of 2021. In Europe, the situation prompted heightened ambitions and strengthened policies to advance clean energy transitions and reduce dependency on fuel imports. But in the short term, it also resulted in a partial return to coal-fired electricity generation. Sluggish economic growth is expected to dampen global electricity demand growth in 2022 and 2023 to less than half the rate seen in 2021. Despite gas-to-coal switching and low nuclear power plant availability in Europe, global electricity sector emissions may decline slightly in 2022 and 2023 – reflecting a combination of slowing power demand and displacement of fossil fuels by renewables.

This July 2022 update of the IEA Electricity Market Report presents our latest forecasts for global electricity demand, supply and emissions through 2023. In light of Russia's invasion of Ukraine, we also provide a special focus on the situation in Europe, discussing recent developments and future plans.

Gas Market Report Q3-2022 Including Gas 2022 medium-term forecast to 2025

Russia's invasion of Ukraine has exacerbated the tightening supply of natural gas underway since mid-2021, further pushing up prices for consumers and leading to fuel switching and demand destruction. It also casts longer-term uncertainty on market prospects for natural gas, especially in developing markets where it was to play a central role in energy transitions.

Natural gas demand is expected to decline in 2022 and remain subdued up to 2025. Europe's surging pursuit of LNG to phase out Russian pipeline supply and limited global LNG export capacity additions raise the risk of prolonged tight markets. Faster development and implementation of clean energy transition policies, especially in mature gas markets, would ease price competition and help emerging markets access supplies that can contribute to short-term improvements in carbon intensity and air quality.

This new issue of the Gas Market Report offers a medium-term forecast and analysis of global gas markets to 2025, as well as a review of recent developments in major regional gas markets during the first half of 2022.

Energy

Tracking Clean Energy Innovation in the Business Sector

Acceleration of clean energy innovation, supported by effective innovation policies, is critical for achieving net-zero emissions by 2050, and the technology development in the business sector will be to success. As their ambitions for technological change rise, governments are increasingly asking how they can measure the performance of their energy innovation systems, prioritise technologies and benchmark progress internationally. However, in most countries, information about private energy innovation is much less readily available and less reliable than that for the public sector. In addition, the available approaches to filling this gap have never before been compiled in a single place.

By presenting a wide variety of different approaches to tracking clean energy innovation in the business sector, this Overview demonstrates that governments and other analysts already have a range of practical options open to them. For example, the wealth of existing experience with surveys of business sector innovation, including R&D, has been applied to questions of energy by several countries. The different approaches that have been followed provide invaluable insights into their advantages, as well as the main challenges of gathering reliable energy-related innovation data from the private sector. These challenges can include the need for upfront investment, institutional capacity building and consistent classification of technologies. However, the advantages in terms of policy-relevant insights can outweigh the drawbacks, especially when data is complemented by other sources of quantitative and qualitative information.

Skills Development and Inclusivity for Clean Energy Transitions

Ongoing energy transitions and decarbonisation efforts are poised to bring profound shifts in the sector's employment, including massive new opportunities for job creation in clean energy. At the same time, traditional energy sectors will experience declining job opportunities. In most cases, this will require the development of both new programmes of education, certification and vocational training along with targeted upskilling or reskilling programmes for the existing workforce. Several governments, companies and industry organisations, among other stakeholders, are already developing robust educational and skills training programmes to meet the challenges of the workforce transition. Therefore, a review of existing skills and training programmes can provide valuable insights for others embarking on their own energy transitions. This report compiles a collection of case studies from around that world that showcase programmes designed to address skills development of workforces for energy transitions.



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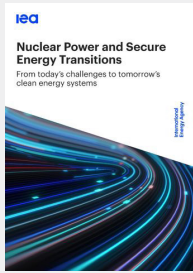


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Energy

Nuclear Power and Secure Energy Transitions **From today's challenges to tomorrow's clean energy systems**

Nuclear Power and Secure Energy Transitions: From Today's Challenges to Tomorrow's Clean Energy Systems is a new report by the International Energy Agency that looks at how nuclear energy could help address two major crises – energy and climate – facing the world today. Russia's invasion of Ukraine and the disruptions in global energy supplies that it has fuelled have made governments rethink their energy security strategies, putting a stronger focus on developing more diverse and domestically based supplies. For multiple governments, nuclear energy is among the options for achieving this. At the same time, many governments have in recent years stepped up their ambitions and commitments to reach net zero emissions. Nuclear Power and Secure Energy Transitions expands upon the IEA's landmark 2021 report, Net Zero by 2050: A Roadmap for the Global Energy Sector. It does so by exploring in depth nuclear power's potential role as a source of low emissions electricity that is available on demand to complement the leading role of renewables such as wind and solar in the transition to electricity systems with net zero emissions.

In this context, the report examines the difficulties facing nuclear investment, particularly in advanced economies, in the areas of cost, performance, safety and waste management. It considers the additional challenge of meeting net zero targets with less nuclear power than envisioned in the IEA Net Zero Roadmap, as well as what kind of cost targets could enable nuclear power to play a larger role in energy transitions. For countries where nuclear power is considered an acceptable part of the future energy mix, the new report identifies the potential policy, regulatory and market changes that could be implemented in order to create new investment opportunities. It also looks at the role of new technologies, particularly small modular reactors, and their potential development and deployment.

OECD Tokyo Centre
E-mail tokyo.contact@oecd.org
Website <http://www.oecd.org>