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## Economics

### OECD Economic Surveys: Japan 2024

Japan has navigated the dual shock of the pandemic and the energy crisis well. However, significant headwinds from weak global growth, geopolitical tensions and high inflation highlight the importance of enhancing the Japanese economy’s resilience to shocks. In a context of inflation, which has risen above target, and pressures from divergent monetary policy from peers, adjustments to monetary policy settings have commenced. Given high public debt, fiscal consolidation to rebuild fiscal buffers, underpinned by a credible medium-term fiscal framework to put the debt-to-GDP ratio on a clear downward path, is key. Longer-term sustainability also requires reducing greenhouse gas emissions in line with government targets, calling for green investment, innovation and carbon pricing. Reforms to improve the innovation framework and incentives for start-ups are key to boost productivity and address ageing pressures. Removing obstacles to the employment of women and older persons and making greater use of foreign workers are also essential to counter demographic headwinds. Strengthening the financial position of young people and policies to support families and children, such as improved parental leave, would help to reverse the downward trend in the fertility rate

SPECIAL FEATURE: ADDRESSING DEMOGRAPHIC HEADWINDS

### OECD Economic Surveys: Denmark 2024

Following a robust recovery, growth has slowed and the economy has been running at two speeds. Headline inflation has fallen, but underlying price pressures remain high. While the public finances are robust with a budget surplus and low public debt, population ageing poses long-term risks to the social model, calling for efficiency gains at the local level. Ambitious greenhouse gas emission reduction targets and policies are in place, but further reforms are needed to advance the green transition. A reduction in barriers to working longer hours, extending working lives for young and older people, and international recruitment can help to address persistent labour shortages. The demographic, digital and green transitions will transform jobs and skills requirements, calling for an agile education and training system throughout working life.

SPECIAL FEATURE: ADDRESSING LABOUR AND SKILLS SHORTAGES



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## Economics

### OECD Economic Surveys: Italy 2024

Italy has weathered recent crises well. A strong fiscal policy response, enhanced competitiveness and improved banking sector health have supported growth in recent years. But public debt is high and spending pressures are rising from population ageing, higher interest rates, and the green and digital transitions. A steady fiscal consolidation is needed over several years to put debt on a more prudent path. Growth in spending needs to be contained, but public investment in the National Recovery and Resilience Plan should be protected to minimise adverse effects on growth. The ongoing civil justice and public administration reforms will support growth by raising business investment and facilitating the implementation of public investment plans. Regulatory barriers to competition in services should be reduced. Raising employment, including by expanding access to early childhood education to reduce barriers to female labour market participation, would make growth more inclusive. Additional policy efforts are needed to accelerate the reduction of greenhouse gas emissions and adapt to climate change. Renewable power generation has advanced, but complex permitting procedures that hold back the installation of renewable energy capacity need to be simplified.

**SPECIAL FEATURE:** Achieving the energy and climate transition

## Finance and Investment

### Consumer Finance Risk Monitor

Using original data collected from governments around the globe, the Consumer Finance Risk Monitor analyses the constantly evolving issues and risks facing consumers of financial products and services. It examines consumer harms and complaints in five product markets (banking and payments, credit, insurance, investments and pensions) and describes regulatory and supervisory responses to address market conduct risks. It also presents data on financial scams and frauds, highlights tools used to monitor risks, and identifies consumer protection policy responses.

### Global Insurance Market Trends 2023

Global Insurance Market Trends provides comparable, cross-country data on insurance markets. It is a comprehensive source of statistical information for government authorities (regulators, finance ministries, and central banks), the insurance sector, the research community, and consumers. The report is based on the inputs from national insurance authorities and supports monitoring and analysis of the insurance sector. This report shows data for 2022.

## Finance and Investment

### Peer Reviews of Competition Law and Policy: Dominican Republic

Peer reviews of competition law and policy are a valuable tool to reform and strengthen a country's competition framework. This peer review of the Dominican Republic presents the evolution of its competition regime over the last few years and assesses the effectiveness of its current competition law and policy. It provides recommendations to help the Dominican Republic strengthen its competition regime and institutions, developed and discussed at the Peer Review examination carried out during the 2023 OECD-IDB Latin American and Caribbean Competition Forum.

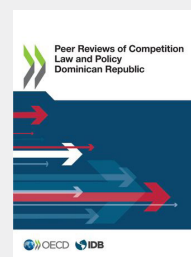
### Sustainable Investment Policy Perspectives in the Economic Community of West African States (ECOWAS)

The Economic Community of Western African States (ECOWAS) offers a large and diverse market of over 400 million people and natural resource wealth, and yet it is not currently living up to its potential as a destination for international investment. Inflows of foreign direct investment (FDI) in the region have been declining over time, and have not always delivered on promoting sustainable development. This report serves as a baseline diagnostic to explore ways to reinvigorate the reform of the ECOWAS investment climate while also improving sustainable outcomes from investment. It also highlights areas where further collaboration between ECOWAS and the OECD could contribute to improved investment climates throughout the region. Building upon the OECD Policy Framework for Investment and the FDI Qualities Policy Toolkit, the report covers the national regulatory framework encapsulated in national investment laws and how this compares with initiatives at a regional level, investment promotion and facilitation, investment incentives, investment for green growth and responsible business conduct.

## Governance

### Developing an Effective Online Dispute Resolution Concept in Latvia

This report assesses the use of online dispute resolution (ODR) in Latvia. It looks at the country's efforts to modernise its justice system and develop dispute resolution mechanisms, identifies areas for improvement in line with the OECD ODR Framework, and provides examples of the application of ODR in other countries. The assessment is enriched by the application of the OECD ODR Framework to three specific types of claims – simplified and warning procedures, and consumer claims. It provides recommendations for successfully implementing ODR in Latvia and broadly modernising the justice sector to ensure better access to justice for all.



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## Governance

### Evaluation of Belgium's COVID-19 Responses Fostering Trust for a More Resilient Society

As countries seek to draw lessons from the COVID-19 crisis and increase their future resilience, evaluations are important tools to understand what worked or not, why and for whom. This report builds on the OECD work on 'government evaluations of COVID-19 responses'. It evaluates Belgium's responses to the pandemic in terms of risk preparedness, crisis management, as well as public health, education, economic and fiscal, and social and labour market policies.

Belgium's response to the pandemic preserving the country's resilience in the future will require promoting trust in public institutions and whole-of-government approaches to crisis management, reducing inequalities, and preserving the fiscal balance. The findings and recommendations of this report will provide guidance to public authorities in these efforts.

## Social issues/Migration/Health

### Fiscal Sustainability of Health Systems How to Finance More Resilient Health Systems When Money Is Tight

Finding sufficient funds to pay for more resilient health systems is challenging in the current economic context. COVID-19 has shown the need for additional targeted spending on public health interventions, the digital transformation of health systems, and bolstering the health workforce. Rising incomes, technological innovation and changing demographics put further upward pressure on health spending. This could result in health spending reaching 11.8% of GDP across OECD countries by 2040.

This publication explores the policy options to finance more resilient health systems whilst maintaining fiscal sustainability. It finds that the scale of the additional health financing needs requires ambitious and transformative policy changes. Robust actions to encourage healthier populations and policies to reduce ineffective spending can put future health expenditure on a far gentler upward trajectory. These would enable spending to reach a more sustainable 10.6% of GDP in 2040.

Better budgetary governance is critical. It improves how public funds for health are determined, executed and evaluated. Therefore, a focus of this report is on how good budgeting practices can increase the efficiency of current public spending, and also enable more ambitious policy changes in the medium to longer-term. Findings of this report are targeted at health and finance policy makers, with improved dialogue between health and finance ministries especially important when governments are operating in a constrained fiscal setting.

## Social issues/Migration/Health

### Rethinking Health System Performance Assessment A Renewed Framework

Health systems are under intense pressure to adapt to evolving needs and megatrends driven by population ageing, digitalisation, and climate change. They also need to be better prepared to withstand sudden, large-scale shocks such as pandemics, financial crises, natural disasters, or cyberattacks. This shifting policy context and emerging challenges called for a revision in how OECD countries assess health system performance, to help ensure that health systems meet people's health needs and preferences while providing quality healthcare for all. This document presents the OECD's renewed health system performance assessment framework. It incorporates new performance dimensions, notably people-centredness, resilience, and environmental sustainability, and places increased emphasis on addressing inequalities, including those related to gender. This framework expands on existing OECD efforts in these domains and integrates the most recent advancements in health system performance assessment. By offering common definitions and fostering a shared understanding among policy makers, stakeholders and organisations, the updated framework will enhance international collaboration. Furthermore, it lays the foundation for developing future indicators, facilitating data collection, policy analysis, and the integration of knowledge.

## Agriculture and Food

### Review of G7 Government-led Voluntary and Mandatory Due Diligence Measures for Sustainable Agri-food Supply Chains

This report aims to provide G7 agricultural policy makers with insights to better understand the design, objectives and mechanisms of national and regional, voluntary and mandatory due diligence-related measures. The report creates a fact-based selective inventory for policy makers to identify common elements across the measures with a view to strengthening, where possible, coherence of G7 policy responses to promote responsible business conduct in agricultural supply chains. The inventory also aims to help companies understand different national and regional standards by highlighting synergies and, where applicable discrepancies, to enable and support effective implementation.



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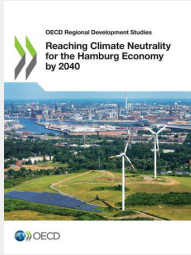


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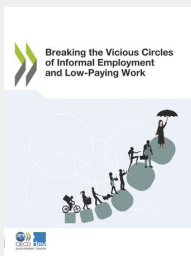


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## Urban, Rural and Regional Development

### Reaching Climate Neutrality for the Hamburg Economy by 2040

Reaching climate neutrality requires economic transformations of unprecedented scale and speed. Immediate action from the business community can avoid unnecessary costs, create wellbeing co-benefits and prepare local businesses with a better competitive position in the future climate neutral economy. This report shows what reaching climate neutrality by 2040 means for Hamburg businesses and identifies key actions they need to undertake. It provides insights where the Hamburg economy and its businesses stand on the way to climate neutrality and on their needs to advance, drawing on a business survey. The study also shares insights from action plans of selected comparison cities. It points to cross-sector as well as to sector-specific challenges and opportunities for Hamburg businesses. This includes making better use of low-cost renewables, addressing energy efficiency in buildings as well as challenges and opportunities in activities in and around the port and in industry. It highlights Hamburg's potential as a hydrogen hub as well as the need to adopt circular economy practices. It illustrates that a regional and business perspective are necessary to achieve climate neutrality in prosperity, requiring individual and collective business action.

## Development

### Breaking the Vicious Circles of Informal Employment and Low-Paying Work

This report adds two perspectives on informality. First, it disassembles the mechanics of the deleterious links between informal employment, low-paying work and low skills. It shows that informal employment is highly persistent, and that the vulnerability of informal workers is passed on to their children in the absence of adequate education, skills and social protection policy. Second, the report underscores the double burden of informality and low-paying work that a large share of workers in developing and emerging economies carry, and as such calls for policy solutions that go beyond the formalisation agenda and embrace the goal of social justice.

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