

# **Trade Sustainability Impact Assessment in support of FTA negotiations between the European Union and Australia**

***Draft final report***

## **ANNEXES**



## ACRONYMS

AAAQ	Availability, Accessibility, Acceptability and Quality
AAWS	Australian Animal Welfare Standards
ABARES	Australian Bureau of Agricultural and Resource Economics
ACCSR	Australian Centre for Corporate Social Responsibility
ACCU	Australian Carbon Credit Units
ACOSS	Australian Council for Social Service
ACP	African, Caribbean and Pacific Countries
AHRC	Australian Human Rights Commission
AHS	Effectively Applied Tariff
ANREU	Australia National Registry of Emissions Units
ANZCERTA	Australia-New Zealand Closer Economic Relations Trade Agreement
APEC	Asia-Pacific Economic Cooperation
API	ASEAN Prosperity Initiative
AQI	Air Quality Index
ASEAN	Association of Southeast Asian Nations
ATMEG	Agricultural Trade and Marketing Experts Group
AUS	Australia
AVE	Ad Valorem Equivalents
BIT	Bilateral Investment Treaties
BND	Bound Tariff
BSE	Bovine Spongiform Encephalopathy
CBD	Convention on Biological Diversity
CEACR	Committee of Experts on the Application of Conventions and Recommendations
CEDAW	Committee on the Elimination of Discrimination against Women
CEEV	Comité Européen des Entreprises Vins
CERD	Convention on the Elimination of All Forms of Racial Discrimination
CESCR	Committee on Economic, Social and Cultural Rights
CETA	Comprehensive Economic and Trade Agreement
CFR	Charter of Fundamental Rights
CGE	Computable General Equilibrium
CITES	Convention on International Trade in Endangered Species of Wild Fauna and Flora
CoTS	Crown of Thorns Starfish
CPI	Consumer Price Index
CPTPP	Comprehensive and Progressive Agreement for Trans-Pacific Partnership
CRPD	Convention on the Rights of Persons with Disabilities
CSD	Civil Society Dialogue
CSR	Corporate Social Responsibility
DA	Department of Agriculture and Water Resources of Australia
DG	Directorate-General
DRIVES	Development and Research on Innovative Vocational Education Skills
EAHP	European Association of Hospital Pharmacists
EBA	Everything but Arms
EC	European Commission
ECHR	European Convention on Human Rights
EDGAR	Emissions Database for Global Atmospheric Research
EESS	Electrical Equipment Safety System
EFPIA	European Federation of Pharmaceutical Industries and Associations
ELV	End-of-Life Vehicle
EPBC	Environment Protection and Biodiversity Conservation
EPHA	European Public Health Alliance
ERF	Emissions Reduction Fund
ESMO	European Society for Medical Oncology
EU	European Union
FDI	Foreign Direct Investment
FIRB	Australian Foreign Investment Review Board
FRA	Fundamental Rights Agency
FTA	Free Trade Agreement
FTAAP	Free Trade Area of the Asia-Pacific
GATT	General Agreement on Tariffs and Trade
GEMS	Greenhouse and Energy Minimum Standards
GDP	Gross Domestic Product

GE	General Equilibrium
GfC	Guidelines for Cattle
GGFC	Gross Government Final Consumption
GHG	Greenhouse Gas
GI	Geographical Indication
GMO	Genetically Modified Organism
GPA	Agreement on Public Procurement
GRP	Global Reference Pricing
GSIM	Global Simulation Model
GSP	Generalised Scheme of Preferences
GTAP	Global Trade Analysis Project
GVA	Gross Value-Added
GVC	Global Value Chain
HAP	Hazardous Air Pollutants
HDI	Human Development Index
HHI	Herfindahl-Hirschman Index
HQB	High Quality Beef
HRW	Human Rights Watch
ICESCR	International Covenant on Economic, Social and Cultural Rights
ICIO	Inter Country Input Output
ICPED	International Convention for the Protection of All Persons from Enforced Disappearance
ICRMW	International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families
ICT	Information and Communications Technology
ILO	International Labour Organization
IMI	Innovative Medicine Initiative
IP	Intellectual Property
IPR	Intellectual Property Rights
ISG	Inter-Service Steering Group
ISO	International Organisation for Standardization
LCA	Life Cycle Assessment
LDC	Least Developed Country
LGBTI	Lesbian, Gay, Bisexual, Transgender and Intersex
LSE	London School of Economics Enterprise
MFN	Most Favoured Nation
MRA	Mutual Recognition Agreement
MSAG	Multi-Stakeholder Advisory Group
NAP	National Action Plan
NatRUM	National Return of Unwanted Medicines
NCP	National Contact Point
NDC	Nationally Determined Contribution
NEG	National Energy Guarantee
NEPC	National Environment Protection Council
NEPM	National Environment Protection Measure
NGER	National Greenhouse and Energy Reporting Scheme
NGO	Non-Governmental Organization
NPS	National Prescribing Service
NRA	National Regulatory Authority
NTB	Non-Tariff Barriers
NTM	Non-Tariff Measure
NWI	National Water Initiative
NZ	New Zealand
OBS	Other Business Services
OCT	Overseas Countries and Territories
ODA	Official Development Assistance
OECD	Organisation for Economic Cooperation and Development
OIE	Organisation Internationale des Épizooties
OP-CRC-CI	Optional Protocol to the Convention on the Rights of the Child on a Communications Procedure
OP-ICESCR	Optional Protocol to the International Covenant on Economic, Social and Cultural Rights
OR	Outermost Regions
PACER	Pacific Agreement on Closer Economic Relations
PARC	Partnership Agreement for Relations and Cooperation

PBAC	Pharmaceutical Benefits Advisory Committee
PBS	Pharmaceutical Benefits Scheme
PE	Profit Elasticity
PE	Partial Equilibrium
PPML	Poisson Pseudo-Maximum Likelihood
PPP	Public-private Partnership
PTE	Patent Term Extension
RBC	Responsible Business Conduct
RDP	Regulatory Data Protection
RoO	Rules of Origin
ROW	Rest of World
R&D	Research and Development
SDG	Sustainable Development Goals
SDL	Sustainable Diversion Limits
SIA	Sustainability Impact Assessment
SME	Small and Medium Sized Enterprise
SPC	Supplementary Protection Certificate
SPS	Sanitary and Phytosanitary measures
STEM	Science, Technology, Engineering and Mathematics
STRI	Services Trade Restrictiveness Index
TBT	Technical Barriers to Trade
TCE	Trade Cost Equivalents
TFEU	Treaty on the Functioning of the European Union
TGA	Therapeutic Goods Administration
TiVA	Trade in Value Added
ToR	Terms of Reference
TPP	Trans-Pacific Partnership
TPPA	Trans-Pacific Partnership Agreement
TPRM	Trade Policy Review Mechanism
TRIPS	Trade Related Aspects on Intellectual Property Rights
TRQ	Tariff-rate Quota
TSD	Trade and Sustainable Development
TSIA	Trade Sustainability Impact Assessment
TTIP	Transatlantic Trade and Investment Partnership
UK	United Kingdom
UN	United Nations
UNCTAD	United Nations Conference on Development and Trade
UNDP	United Nations Development Programme
UNECE	United Nations Economic Commission for Europe
UN ESCAP	United Nations Economic and Social Commission for Asia
UNGP	United Nations Guiding Principles on Business and Human Rights
US	United States
WEEE	Waste Electric and Electronic Equipment Directive
WEF	World Economic Forum
WEgate	Women's Entrepreneurship Gate
WET	Wine Equalisation Tax
WHO	World Health Organisation
WIGB	Women in Global Business
WIOD	World Input Output Database
WITS	World Integrated Trade Solution
WTO	World Trade Organisation

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## **II. ANNEX II: METHODOLOGICAL APPROACH**

In the four sections of this Chapter we explain concisely how each of the sustainability pillar approaches will be carried out.

### **II.1 Detailing the economic approach**

The starting point for the economic analysis in this report is the modelling (a Computable General Equilibrium (CGE) model) undertaken by the Commission (in the study supporting the impact assessment carried out by LSE Enterprise, 2017), which is an appropriate and accepted approach for analysis of trade agreements dealing with traditional issues of cross-border trade in goods and services. The economic variables for focus include trade flows (bilateral exports and imports; exports and imports to the rest of the world); investment; output; prices; welfare and GDP; and fiscal revenues. Further analysis, in subsequent reporting, will be based on the revised CGE simulation results from DG Trade. The analysis will also include a discussion on the limitations of the CGE results (e.g. pertaining to preference utilisation and not including innovation/dynamic FDI effects).

We will build on this analysis by providing a qualitative and, to the extent possible, quantitative, assessment of the main non-tariff measures (NTMs), investment and other behind-the-border issues of relevance to the EU-AUS FTA. These include:

- Strict phytosanitary import regulations in Australia for fresh fruits and vegetables;
- Australia's Electrical Equipment Safety System (EESS) that applies to the import of all electrical equipment and requires various testing, documentation and certification procedures, imposing direct and indirect costs on EU SMEs; and
- Foreign investment above certain defined thresholds is subject to screening in Australia, which has become more complex over time, with additional screening mandated for sensitive sectors such as media, real estate, defence, telecommunications, air transport and airports, encryption and security.

Since these issues are addressed in quite some detail in the ex-ante study, the SIA will identify, describe and analyze the main remaining tariff barriers and NTMs affecting trade relations between the EU and Australia. The focus of this analysis will be qualitative, since a quantitative treatment would require an extension to the CGE modelling, which has not been requested, and the quantitative analysis already undertaken has largely exhausted the possibilities of the existing CGE model. We anticipate that information on NTMs will emerge primarily from stakeholder consultations and multilateral and bilateral monitoring (e.g., the WTO TPRM, EU Market Access Database, and also – if applicable to EU or AUS – the US Special 301 and other reports), as well as business surveys (including the surveys undertaken as part of this SIA). We will also pay attention to any NTMs in the area of Intellectual Property Rights.

We will complement this qualitative analysis by undertaking quantitative assessments of government procurement and investment liberalization under the EU-AUS FTA – given the appropriate legal frameworks in the EU and Australia (i.e. in the EU with respect to EU overall and EU Member State procurement, and in Australia with respect to the Australian federal as well as Australian State and Territory governments). We will do this by estimating structural gravity models of procurement and investment separately (see Boxes below), using data on public imports from the World Input Output Database (WIOD; Timmer et al., 2015) over 2000-2014 and data on bilateral FDI from the OECD and UNCTAD over 2000-2017, respectively. The economic analysis will also describe the government procurement and FDI landscapes in the EU and Australia, including for major sectors, the important legislative requirements governing liberalization in each case, as well as the opportunities and challenges that EU SMEs will face in accessing Australia's procurement market at all levels, especially SMEs involved in the main sectors.

### *Box II.1: Gravity approaches to Foreign Direct Investment*

We estimate a structural gravity model of bilateral FDI flows and stocks using data on inward FDI from the OECD over 2005-2017 for the following 36 OECD partners: Australia, Austria, Belgium, Canada, Chile, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, Korea, Latvia, Lithuania, Luxembourg, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Turkey, UK and USA.

We use the Poisson Pseudo-Maximum Likelihood or the PPML estimator (Silvana and Tenreyro, 2006) to examine the effect of preferential investment liberalization in the EU-AUS FTA on the bilateral FDI flows and stocks. The PPML accounts for both the incidence of zero FDI flows and stocks and heteroskedasticity of the error term in estimation, leading to unbiased estimates. The estimating equations (1) and (2) take the following form:

$$FDI_{ijt}^F = \exp(\beta_0 + \beta_1 PIA_{ijt} + \beta_2 BIT_{ijt} + \lambda_{it} + \lambda_{jt} + \lambda_{ij}) + \mu_{ijt} \quad (1)$$

$$FDI_{ijt}^S = \exp(\beta_0 + \beta_1 PIA_{ijt} + \beta_2 BIT_{ijt} + \lambda_{it} + \lambda_{jt} + \lambda_{ij}) + \mu_{ijt} \quad (2)$$

where the dependent variables in the two equations are bilateral inward FDI flows and stocks in country *i* from country *j* at time *t* in € million;  $PIA_{ijt}$  is a binary dummy indicating membership of a trade agreement with provisions on investment between two FDI partners;  $BIT_{ijt}$  is a binary dummy indicating membership of a bilateral investment treaty between two FDI partners; and  $\mu_{ijt}$  is the error term. We include three-way fixed effects ( $\lambda_{it}$ ,  $\lambda_{jt}$ ,  $\lambda_{ij}$ ) to account for multilateral resistance (for instance see Anderson & Yotov, 2012) as well as endogeneity (for instance see Baier & Bergstrand, 2007; Baier et al. 2014) in estimation.

### *Box II.2: Gravity approaches to Public Procurement*

We use the Poisson Pseudo-Maximum Likelihood or the PPML estimator (Silvana and Tenreyro, 2006) to examine the effect of preferential procurement liberalization in the EU-AUS FTA on bilateral procurement. The PPML accounts for both zero trade flows and heteroskedasticity of the error term in estimation, leading to unbiased estimates. The estimating equation (3) takes the following form:

$$M_{ijt}^G = \exp(\beta_0 + \beta_1 GPA_{ijt} + \beta_2 PPA_{ijt} + \lambda_{it} + \lambda_{jt} + \lambda_{ij}) + \mu_{ijt} \quad (3)$$

where the dependent variable is public imports in country *j* from country *i* at time *t* in € million;  $GPA_{ijt}$  is a binary dummy indicating membership of the GPA;  $PPA_{ijt}$  is a binary dummy indicating membership of trade agreements with provisions on government procurement; and  $\mu_{ijt}$  is the error term. We include three-way fixed effects ( $\lambda_{it}$ ,  $\lambda_{jt}$ ,  $\lambda_{ij}$ ) to account for multilateral resistance (for instance see Anderson & Yotov, 2012) as well as endogeneity (for instance see Baier & Bergstrand, 2007; Baier et al. 2014) in estimation.

On rules of origin (RoO), the economic analysis will include an overview of RoO practices in Australia, highlighting whether there have been any recent RoO violations (issues with certificates/fraud and verification issues), thereby providing an assessment of the capacity to administer RoO. Complementary information will be collected through interviews with stakeholders, notably customs and traders. A focus will be put on SMEs, both in the EU and Australia, regarding their experience with RoOs, in order to identify options for a simplified RoO regime for SMEs in the EU-AUS FTA.

The assessment of the impact of the EU-AUS FTA on SMEs will be based on:

- The investigation, study and interpretation of the project results on implications of legal uncertainty for SMEs in case dispute resolution is needed; and
- The “SME test” reflecting the “think small first principle” suggested in the ToR and described in the Better Regulation Guidelines. The analysis will focus on identifying the sectors where SMEs could be more strongly impacted by the EU-AUS FTA.

With respect to global value chain (GVC) integration, the analysis will use the OECD-WTO Trade in Value Added (TiVA) database to establish the current positions of Australia in GVCs, and particularly in value chains involving EU firms. We will also identify the characteristics in terms of (i) the sectors in which GVCs play a particular role for Australia; (ii) the role which Australian and EU firms play in value chains involving both partners, i.e.

whether they are value chain organizers or participants in value chains organized by third parties; (iii) the importance of backwards and forwards linkages and the position of FTA partner firms in the chain; and (iv) the potential contribution which the FTA may have on the strengthening Australia's participation in GVCs. We will then estimate the effect of preferential liberalization in the EU-AUS FTA on bilateral backward and foreign participation by estimating a structural gravity model using TiVA data from the OECD over 2000-2011. We will also complement these quantitative estimates with a qualitative analysis. This will be based on information provided by private sector organizations to identify important sectors from a GVC-participation perspective and to identify options on how the FTA could facilitate GVC involvement, such as through a focus on intermediates or business services which are important for GVC development.

Geographically, the effects of the EU-AUS FTA will be determined for the following regions/countries: Australia; the EU; the EU Outermost Regions; Turkey; and LDCs. To the extent possible, the analysis of effects will be quantitative, using CGE results and statistical analysis of the main trade links and changes in tariffs.

In assessing the effects of the EU-AUS FTA on the EU's Outermost Regions, as well as on LDCs, we will add value to existing studies by (i) looking at the PACER Plus group<sup>1</sup> in more detail; and (ii) analyzing the impact on the EU's outermost regions for the first time at all. The methodology involved will entail a sector-disaggregated analysis. In a first step, the economic modelling results will be used to determine the sectors in the EU and Australia that would benefit (or lose out) from the FTA in terms of increased (or decreased) bilateral exports, total exports and output. In a second step, a matching analysis will be undertaken to examine the extent to which the most affected sectors in the two partner countries are also export sectors in LDCs/outermost regions (to either Australia or the EU). If there is competition, then LDC/outermost region sectors could be negatively affected through preference erosion and/or increased competitive pressure on third markets. The effects will be determined qualitatively, distinguishing, if applicable, the countries or regions, which might be positively or negatively affected by the EU-AUS FTA.

*Box II.3: Global Simulation Model (GSIM) approaches to the motor vehicles and transport equipment sector*

In order to analyze the effects of the EU-AUS FTA on the motor vehicles and transport equipment sector, which is one of the major industries impacted by the FTA, a partial equilibrium (PE) Global Simulation Model (GSIM) was applied with regard to iron ore, which is a crucial input material for the sector. The choice between a PE or a GE model depends on the preference and skills of the analyst (Bacchetta et al., 2012) or the phenomenon being explored. The differences between GE and PE also extends to the data requirements. A GE model needs data for the global market, therefore requiring a far more extensive dataset, much larger than a PE model which only requires data from the specific market. It is important to note that PE model results are sensitive to the values of elasticities of supply and demand, on which the current literature is limited. For this case study a PE model has been chosen because the effect of the trade liberalization shock is analyzed for one industry specifically, the iron ore industry, which under the CGE results provided by DG Trade is summarized as minerals, although the iron ore sector constitutes largely to Australia's economy and is also a major import of the EU. For the iron ore case study under the EU-AUS FTA, the GSIM was applied to estimate the effects of the EU-AUS FTA on iron ore trade. In 2002, Francois and Hall created the GSIM to analyse global trade policy changes and their effect on trade flows, world prices and welfare (Francois and Hall, 2002). The GSIM is a PE model that focuses on a specific amount of country or industry-level factors and assesses their impact in a multi-country global market. This approach enables the model to run effectively with only a limited amount of data (Francois and Hall, 2002). The countries included in the GSIM are chosen based on the level of involvement in the market and the nature of the shock. The remaining countries are summarized as the rest of world (RoW). By including the RoW, the model becomes more complex as it is expanded into a global market context. This added complexity increases the GSIM's accuracy

<sup>1</sup> PACER Plus is a group of eleven countries (Australia, Cook Islands, Kiribati, Nauru, New Zealand, Niue, Samoa, Solomon Islands, Tonga, Tuvalu, Vanuatu) who have signed this Pacific Agreement that is comprised of contains cooperation in the areas of y comprises technical chapters on Trade in Goods, Services, Investment and Customs, Movement of Natural Persons, Technical Barriers to Trade, Rules of Origin, Customs and Sanitary and Phytosanitary Measures.

(Francois and Hall, 2002). Four specific data sets are required for the GSIM: initial trade values between the chosen countries or markets, quantified NTMs, the elasticities of demand, supply and substitution. The initial trade values are the values of export and import of each country before the occurrence of the shock. The barriers that affect the trade flows between countries can be in the form of tariffs, subsidies or NTMs. Through quantifying the relevant NTMs for the study, the goal is to quantify the trade cost equivalents (TCEs) of the NTMs (Berden and Francois, 2015). An initial baseline set of NTM figures is included in the model, followed by the new NTM values. Based on the data, the GSIM will calculate the estimated trade values, welfare and price changes amongst other parameters subject to the new costs. The chosen countries involved in this model include the EU27, Australia, the UK, New Zealand, China, Brazil, the US, and LDCs. The choice is based on the main parties under the planned FTA as well as other major exporting and importing countries in the iron ore industry. The UK is taken into account separately from the EU28 in light of the process of the UK's withdrawal from the EU. The tariffs for iron ore imports and exports for the EU, Australia, and the remaining specified countries required under this model are based on the World Integrated Trade Solution (WITS) database. The elasticities are estimated using secondary sources and the bilateral trade data between the specified countries comes from UN Comtrade.

## II.2 Detailing the social approach

The social analysis seeks to respond to the question of how a reduction of tariff and non-tariff barriers between the Parties via the EU-AUS FTA, the resulting changes in output of individual sectors and export and import activities they are involved in, may affect a range of social aspects in the EU and Australia. We also seek to determine potential direct and indirect social impacts of other provisions of the future FTA, e.g. on Technical Barriers to Trade (TBT) or Trade and Sustainable Development (TSD).

Our approach consists of three steps:

- **Step 1:** We develop an overview of the current situation in the EU and Australia, recent trends in the analyzed social aspects (e.g. employment) and factors influencing them.
- **Step 2:** We identify impacts of the future FTA, for the whole economy and chosen sectors, based on the economic model, literature review, statistical data and broad stakeholder engagement.
- **Step 3:** We provide recommendations for policy initiatives and accompanying measures.

In Step 1, the analysis of the current situation has been based mainly on literature review and analysis of statistical data. This includes e.g. the annual reporting about the situation on the labour market provided by the European Commission (2019 EU Joint Employment Report) and the Australian Government, accompanied by data from the Labour Survey processed by EUROSTAT and the Australian Bureau of Statistics. Data regarding job quality includes reports prepared by specialized agencies, such as Safe Work Australia regarding e.g. the number and type of accidents at work. The section on consumers, welfare, poverty and inequality relies upon many sources, including statistical data on wages complemented by analysis done by experts concerning recent trends in wage levels and expected changes, as well data provided by the European Commission, OECD and the Australian Council of Social Service regarding poverty and inequality. Rights at work are analyzed based on the reports of the ILO monitoring body, the Committee of Experts, other types of international monitoring and reporting, such as the Global Slavery Index, surveys and research studies,<sup>2</sup> as well as relevant reports and analysis provided by the European Commission, the Australian Government, the European Parliament and the OECD. Surveys conducted by the University of Melbourne or NGOs, and a study funded by the European Commission have also been used in the analysis of uptake of corporate social responsibility practices and women's activity as entrepreneurs and traders. They have been complemented by statistical data from EUROSTAT and the Australian Bureau of Statistics, as well as by

<sup>2</sup> E.g. work carried out by researchers from Universities in Sydney discussing cases of exploitation of migrant workers and work in conditions of slavery.

information about support programmes for female entrepreneurs and about international initiatives, under the auspices of the WTO and APEC joined by the EU and Australia. A full list of sources has been provided in bibliography (Annex I).

The starting point for Step 2, the analysis of impacts, will be provided by the ex-ante study and the Commission's Impact Assessment Report, both detailing outcomes of the economic model, such as estimated changes in employment levels, wages, welfare and Consumer Price Index. We will refer to them in our Report. This will be complemented by further literature review, notably in the sectorial part of the analysis, as well as by a comprehensive stakeholder engagement. In Annex III, we provide a non-exhaustive list of most relevant stakeholders from the EU and Australia, we would like to get in touch with while Chapter 3 of this Report outlines details of stakeholder consultation activities which will cover all pillars of our study, including the social one. We will use meeting opportunities, surveys and interviews to get additional insights into the situation and trends in individual sectors and analyzed social aspects, and to validate our findings. Our analysis at this stage will be guided as well by the Better Regulation toolbox, and a discussion with negotiators involved in talks on the EU-AUS FTA.

In Step 3, we will provide recommendations, which are discussed more in detail at the end of this section.

The analyzed types of impacts – in line with the ToR – cover employment levels, women (as workers, entrepreneurs, traders and consumers), consumer welfare (including inequality and vulnerable groups), job quality, rights at work, corporate social responsibility (CSR), and public policies (e.g. social protection, healthcare and education). We sum up in a very concise manner each of these impact areas below.

**Employment levels:** The current situation analysis (Step 1) describes the labour markets in the EU and Australia. We provide data on employment and unemployment rates for different groups of workers (e.g. skilled and unskilled ones, youth, older workers or indigenous people), trends in job creation across sectors and skills levels, and shares of individual sectors in the total employment. It informs about actions taken by the governments to enhance employability of vulnerable groups of workers and to support skills development. In Step 2 we will assess quantitative impacts of the future FTA on the number of jobs to see how a reduction in barriers to trade will influence performance of individual sectors in the EU and Australia and how this may translate into a potential job creation or a reduction in each sector and a shift of labour force between them. The analysis based on the economic model used by the Commission will provide data for skilled and unskilled workers across all sectors and under two scenarios which assume respectively liberalization and increased liberalization of trade. Matched with the analysis of sectorial shares in total employment, it will provide an idea of the expected scale of changes induced by the agreement. Based on the available data, we will also estimate whether the Parties have conditions in place to seize the opportunity offered by the FTA to increase sectorial output and employment.

**Women (workers, entrepreneurs, traders and consumers):** In Step 1 we describe the situation of women in the EU and Australia on the labour market as workers, the areas of their economic activity as entrepreneurs and participation in international trade, across sectors. It compares data for men and women to determine the level of gender equality across a range of indicators. It also refers to challenges faced by women in their roles and steps taken by governments to address them. At the next stage, based on the results of the economic modelling, we will estimate the likely changes in employment levels across sectors and how they will impact employment of women compared to men (given that each gender has its own pattern of shares in employment across sectors). In a similar way, we will examine changes in output of individual sectors stemming from the EU-AUS FTA and how this may influence operation of women-led enterprises active in these sectors compared to the businesses led by men. Finally, based on the estimated changes in trade performance of the individual sectors, we will analyze what effects this may have on women as traders, knowing sectors in which they operate and types of traded products or services.

Supported by stakeholder consultations and other sources, our recommendations will provide proposals supporting gender equality in trade and addressing challenges faced by women in their roles in the context of the new FTA. Although we describe this issue here, women (as with SMEs) will be treated at a higher level in the report structure to highlight the importance of the issue.

**Consumers, welfare, levels of inequality and impacts on vulnerable groups:** Step 1 provides an overview of the situation of different groups of the population in the EU and Australia with a focus on those exposed to risks of poverty and/or social exclusion. We break this down by education levels, main sources of income, household composition, etc. It also provides data related to inequality levels expressed by the ratio of incomes between the richest and the poorest 20 percent of society. We outline trends in wage levels and have at our disposal further information concerning other factors influencing welfare, such as housing prices or changes in types and levels of social benefits. In Step 2, based on results of the economic modelling, we will estimate impacts of the future EU-AUS FTA on wages and price levels, welfare and inequality. Moreover, using stakeholder consultations and analysis of textual proposals tabled in negotiations, we will draw conclusions regarding broader impacts of an FTA on consumers, including availability of goods and services, their quality and safety, and consumer information and trust. We note that European consumer organizations have published recommendations for the future EU-AUS FTA.

**Job quality:** Step 1 provides an overview of job quality indicators (where available, across sectors) in the EU and Australia, including types of contracts, the number of working hours per week, and the number and types of accidents at work. Step 2 applies the analysis of statistical data and qualitative analysis, supported by literature review and stakeholder consultations, to estimate whether the future FTA will be likely to have an impact on job quality, mainly in sectors most affected by changes in output and trade flows. Therefore, the analysis of the impact on job quality will be carried out as part of the sectorial analysis. To the extent relevant information and data will be available, we will identify more precisely trends in job quality and factors influencing them in each of the analyzed sectors to establish the potential scale and direction of changes which may be induced by the FTA.

**Rights at work:** The description of the current state of play (Step 1) and the impact analysis (Step 2) will be centered around four ILO core labour standards, i.e. 1) non-discrimination at work, 2) elimination of child labour, 3) prohibition of forced labour, 4) freedom of association and the right to collective bargaining. In the context of non-discrimination at work, we provide information about the situation of people with disabilities and migrant workers on the labour market in the EU and Australia. We may extend it e.g. by moving from the general part of the analysis data related to the situation of indigenous people on the labour market. The description of the current situation also indicates examples of sectors where cases of child labour and forced labour have been identified. Moreover, it outlines trends in trade union membership across sectors and factors which have induced observed changes. We also have at disposal further information about planned or taken actions meant to address identified challenges (e.g. to facilitate access to work for people with disabilities or to eliminate cases of forced labour and exploitation of migrant workers in agriculture). Collected evidence has also supported the choice of sectors for a more detailed analysis. In Step 2, jointly with further literature review and stakeholder consultations, it will help us determine the likely scale and direction of impacts of the future FTA on the respect of rights at work in the EU and Australia overall and for most affected sectors. At that stage, we will also cross-reference our findings in this section with those related e.g. to poverty levels, given that children, people with disabilities, indigenous people and migrants may be affected by multiple types of impacts, including changes in employment levels, incomes and prices. In this part of the analysis, we will, moreover, consider potential impacts related to inclusion of a Trade and Sustainable Development (TSD) chapter into the future EU-AUS FTA.

**Corporate Social Responsibility (CSR):** We provide insights into CSR practices in the EU and Australia and factors encouraging their use. The latter may include policy or legislative incentives, image valued by customers, practice of the lead company in the



value chain or of the headquarters influencing actions of branches based in other countries. This combined with stakeholder consultations, will provide an idea of the likelihood and type of potential impacts of the future FTA. We will also seek to determine if cooperation activities proposed in a TSD chapter, such as joint projects or workshops, may encourage peer learning in the area of CSR between business and civil society representatives from the EU and Australia.

**Public policies (social protection, healthcare and education):** The main part of the analysis in this section will seek to identify whether the FTA through changes in tariff rates, revenues (e.g. taxes, tariff revenues, and social security contributions) and expenditures (e.g. social benefits) will influence the availability and accessibility of public services and their quality. We will also examine if e.g. through TBT or Intellectual Property Rights (IPR) provisions (e.g. on medical devices and pharmaceuticals) the EU-AUS FTA may influence the availability of services.

At the final step of our analysis, based on the outcomes from Step 1 and Step 2, we will provide recommendations aimed at strengthening expected positive and mitigating potential negative impacts, which may result from the new FTA. Our aim will be to finish the work early enough to inform the ongoing negotiations. With this in mind, we will divide our recommendations into two parts. The first one will provide proposals to be taken into consideration in the course of negotiations, e.g. through inclusion of a specific text or approach. We would be willing to discuss these proposals with the Commission representatives involved in negotiations. The second set of recommendations will be more forward looking and may suggest actions to be taken by one or both Parties at the stage of implementation of the future FTA or as part of their ongoing policy development.

## II.3 Detailing the human rights approach

This section provides a summary of the detailed approach envisaged for the analysis of the impact of the proposed FTA on human rights in both Australia and the EU. We intend to follow a five-step approach that reflects upon the human impact assessment methodologies (De Schutter, 2011) and EC Guidelines on the analysis of human rights impacts in impact assessments for trade-related policy initiatives (European Commission, 2015). Step 4 will feed into the three main steps of the analysis throughout all the stages of the project. Step 5 will be based on all the other steps of the analysis.

*Figure 2.1: Methodological Structure of the Human Rights Analysis*



In **Step 1**, we present a concise overview of the human rights legal framework (information on the ratification status of the core human rights treaties and core ILO Conventions will be presented in Annex IV in a tabular manner) and current human rights situations reflecting on the pre-existing human rights-related issues of vulnerability in both Parties to the prospective FTA (establish the current state of play). We note this part of analysis has been carried out in the ex-ante study (LSE Enterprise, 2017). Therefore, we will not repeat this work again, but check and reference its results insofar they are relevant and then extend them when necessary by own research based on additional literature review, consultations with local partners and stakeholders. The non-exhaustive list of stakeholders (see Annex III – that we will continuously expand) will be used frequently throughout the study. The first time we use the list is when we approach stakeholders to invite them to express their views on the issues reflected in the ex-ante study as well as suggest sectors and case studies that are most likely to be affected by the EU-AUS FTA.

In **Step 2**, we carry out a screening and scoping exercise to identify specific key human rights/issues that will most likely be affected by the proposed EU-AUS FTA. The likely cause-effect relationships between trade and trade-related measures in the FTA and human rights are intended to be drawn from multiple sources (FTA texts,<sup>3</sup> literature review, local partners, consultations, etc.). Screening results will be presented in a concise tabular manner due to size limitations of the report but will reflect on the possible direct/indirect and major/minor impacts as specified in Fundamental Rights Check-List in Tool No. 28 of the Better Regulation Box and the EC guidelines. The scoping exercise will clarify the scope and content of the possible impacts pointing out how certain measures can create potential impacts on specific human rights. At this stage we will use a broad survey that will determine the basis, as well as carry out a limited number of human rights focused interviews with stakeholders set up by our Australian counterparts to discuss modelling results and results of the screening and scoping exercises to verify and finetune the analysis.

In **Step 3**, we will focus on the selected human rights/issues and carry out a detailed assessment (both quantitative and qualitative) of these rights, substantiating on the potential impact and analyzing the extent to which particular measures foreseen in the proposed Agreement may enhance or impair the enjoyment of the relevant rights and/or may strengthen or weaken the ability of the parties to fulfil or progressively realize their international human rights obligations. We intend to provide specific examples in case studies.

Quantitative analysis will be based on the econometric results and possible additional economic, social and environmental analyses. Based on these data, we can provide insights, both at aggregate and sector levels, on how the EU-AUS FTA could impact both Parties. Different quantitative variables help us with parts of the human rights analysis and provide in some cases a reflection upon the affected individuals and/or groups of people in relevant sectors (impact on vulnerable groups of the population). The quantitative analysis will be complemented by qualitative assessment. This assessment relies on additional literature review and extensive inputs from the local partners and stakeholders via surveys, interviews and opportunities to provide feedback on draft versions of our work.

**Step 4**, stakeholder consultations, as mentioned above, will run through all the stages of the analysis and support, verify and finetune the findings and conclusions. They also serve as the most important source of information to get insights into the most recent trends in the human rights situation of vulnerable groups. This allows us to assess the potential FTA impact from the perspective of the people (Danish Institute for Human Rights, 2016). At this stage, human rights-related questions will be prepared for the general survey, which will be available on the website and sent out to the identified stakeholders by mail. We will strive to receive at least 25 detailed responses related to the potential human rights impact

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<sup>3</sup> In case the textual proposals for the EU-Australia Agreement are unavailable. We will use the textual proposals of the CETA Agreement and EU-Chile Agreement.

in order to have a representative sample. Moreover, we will discuss with the team internally as well as with the ISG whether it is useful to include additional human rights questionnaires that are built on the human rights impact assessment methodology, and establish specific groups that may potentially be affected (i.e. 'right-holders') and specific groups that have human rights responsibilities (i.e. 'duty-bearers'). From the experience in previous SIAs, interest of stakeholders has been modest at best.

In **Step 5**, we propose policy recommendations and flanking measures helping to strengthen the positive and mitigate any negative human rights impacts of the proposed FTA on human rights, with a focus on the most vulnerable groups. Recommendations will be prepared at an early stage in the project to be able to check them with the ISG and specific human rights organizations. We are also available to meet with the negotiators when draft stages of the research are completed to provide them with insights into our draft findings and listen to (and possibly incorporate) any requests/questions that come out of the negotiations.

## II.4 Detailing the environmental approach

In the environmental impact assessment, we assess the most significant potential environmental impacts resulting from the EU-AUS FTA on both the EU and Australia. The environmental analysis will result in a clear and concise report detailing, both in a quantitative and qualitative manner, which environmental impacts are likely to occur.

We will follow a well-structured approach in order to enable an efficient, effective and transparent process to assess the environmental impacts of the FTA. The approach incorporates four elements:

- 1. FTA elements** – These are measures in the FTA, which can potentially cause environmental impacts. Identified FTA elements: *Market access* and *Rules*;
- 2. Impact channels** – The mechanisms through which the FTA elements can result in environmental impacts. Identified impact channels: *scale effects*, *structural effects*, *technology effects* and *product effects* (in line with the SIA Handbook);
- 3. Impact areas** – The different specific environmental areas which can be affected by the FTA elements. Identified impact areas: *climate change*, *air quality*, *land use and soil*, *biodiversity*, *water and waste*;
- 4. Research methods** – The methodologies used to assess the impact of the FTA on each environmental impact area. Identified research methods: *quantitative and qualitative analyses*.

The environmental approach can be divided up into four consecutive Steps:

- **Step 1:** Establishing the state of play;
- **Step 2:** Quantitative environmental impact assessment;
- **Step 3:** Qualitative impact assessment;
- **Step 4:** Policy recommendations.

We have identified six main environmental impact areas. Even though the impact assessment on each environmental impact area will rely on both qualitative and quantitative research methods (where applicable), the analyses for the first two impact areas (climate change and air quality) will heavily employ quantitative methods. The analyses on the remaining impact areas will mostly rely on qualitative methods.

### Step 1 – Establishing the state of play

Prior to assessing any potential impact of the FTA on the EU and Australia, we will describe the status quo of their **environmental governance** and **environmental performance**. In practice, this implies for the former that we will describe the environmental legislation in place, the responsibilities of different public authorities regarding environmental policymaking, and the impact of multilateral environmental agreements on the respective trade partners. For the latter, this implies an analysis of environmental performance based on relevant environmental impact area indicators for both the EU and Australia. The state

of play will be established using existing literature and data as well as stakeholder interviews. Regarding the literature and data, we will extensively use the LSE's study supporting the ex-ante impact assessment (LSE, 2017) and complement this with additional sources from our own research (aided by our Australian expert). The stakeholder interviews will serve to gain further insights, validate the work, finetune results and generally increase triangulation. They will cover a representative sample of stakeholders – 4 from Australia and 4 from the EU.

Step 1 will result in a one-page description of the state of play per environmental impact area for both the EU and Australia (i.e. 12 pages in total). The state of play for the EU will be based on the work from earlier SIAs as much as possible and will only be critically reviewed/updated where needed. This will ensure that our focus lies on the lesser known (to EU negotiators) Australian environmental impacts, strengthening the overall quality of our outputs in the process.

## **Step 2 – Quantitative environmental impact assessment**

In Step 2 we will produce quantitative estimates of the EU-AUS FTA's impacts on greenhouse gas (GHG) emissions and air pollution that provide more detail than the estimates stipulated in the ex-ante impact assessment. We extend the analysis on GHG emissions by analyzing not only CO<sub>2</sub> but also methane (CH<sub>4</sub>) and nitrous oxide (N<sub>2</sub>O) emissions. The scope of the impact assessment is further expanded by including an air pollution analysis (i.e. assessing the FTA's impact on the concentration of primary particulates, acidifying gases and ozone precursor gases). These extensions are considered relevant because: (i) CH<sub>4</sub> and N<sub>2</sub>O cover approximately 21 percent and 5 percent of all GHG emissions in Australia (Ageis, 2016) and originate from sectors likely to be affected by the FTA; (ii) air pollution had not been assessed before.

The economic results in LSE (2017) do not include results on the impact of the FTAs on CH<sub>4</sub> and N<sub>2</sub>O nor on any air pollutants. Therefore, it is not fully possible to decompose the overall impact figure into the four drivers mentioned in the Handbook for Trade Sustainability Impact Assessments (scale, structural, technology and product effects) using the extended environmental input-output model underlying the economic modelling results. However, with the sectoral economic output results as a basis and gas/pollutant data from the EDGAR database<sup>4</sup>, we can approximate:

- **Scale effect:** The effect resulting from a change in the scale of production only;
- **Structural effect:** The effect from a change in the scale of production, considering the different emission intensities across sectors;
- **Technology/product effect:** The effect of exchange of more efficient technologies or production methods, which could affect (lower) the emission intensity.

The scale and structural effects will be assessed quantitatively, the technology/product effect will be assessed qualitatively.

Step 2 will result in the reporting of the quantitative estimates of the impacts of the FTAs on GHG emissions and air quality, in the EU and Australia (approximately 4 pages). The overall results will be decomposed into their most relevant key drivers where possible. To the extent feasible, we will extend the analysis by an estimation of the welfare effects (i.e. monetize external costs via the NEEDS<sup>5</sup> methodology).

## **Step 3 – Qualitative impact assessment**

In Step 3 we identify and investigate the most significant environmental impacts that are not yet analyzed by means of the quantitative impact assessment from Step 2. Based on the triangulation of inputs from the ex-ante impact assessment, the economic modelling results and the results from qualitative research (causal chain analysis, interviews and literature review), we will continuously update the impact screening matrix. The impact

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<sup>4</sup> Available from: <http://edgar.jrc.ec.europa.eu/#>

<sup>5</sup> Available from: <http://www.needs-project.org/>

screening matrix should be as exhaustive as possible, which will ensure that all impactful environmental pressures and opportunities that may arise from the FTA are covered. The matrix is made up of all (CGE) sectors and all environmental impact areas presented in Step 1. If significant impacts are expected in a certain sector or environmental impact area, we will attach so-called "impact alerts" to the corresponding sector and impact area. Based on these impact alerts, we can select (in cooperation with the ISG) a specific environmental impact area for a detailed Australian case study.

The case study represents a more elaborate causal chain analysis for a specific impact area of a country, based on additional literature review and two additional interviews per case study. The case study will be approximately 2 pages in length and cover, at minimum, an introduction, the (qualitative) state of play and /counterfactual of the impact area, the potential case study specific impacts of the FTA and conclusions and recommendations.

#### Step 4 – Policy recommendations

Based on Steps 1, 2 and 3, we will come up with relevant and concise policy recommendations and flanking measures. We are also happy to provide draft insights for the negotiators and listen to their issues/questions in order to enhance the relevance of our work for the ongoing negotiations.

#### *Quantitative environmental assessment – methodological note*

The quantitative assessment uses three main sources:

1. The Emission Database for Global Atmospheric Research (EDGAR)
2. The economic modeling results
3. United States Environmental Protection Agency (EPA)

EDGAR contains annual data on air pollutants and GHG emissions (including CO<sub>2</sub>, CH<sub>4</sub>, N<sub>2</sub>O, NO<sub>x</sub>, SO<sub>2</sub>, PM10 and PM2.5) per sector for the period 1970-2012. The sector definition in EDGAR differs from the sector definition in the economic modelling results. As a **first step**, the sectors were manually matched. This was done by defining more aggregated sectors (which was necessary as the sector definitions from EDGAR and the economic modelling were too different to be matched directly) and, subsequently, by matching the economic modeling sectors and the EDGAR sectors based on this new sector definition. The result of this matching procedure is shown in the Table below.

*Table: Matching of sectors*

Environmental analysis sectors	Economic modelling sectors	EDGAR sectors
<b>Agriculture - rice</b>	Rice	Rice cultivation
<b>Agriculture - horticulture</b>	Cereals, vegetables and fruits, oilseeds, sugar, fibre crop	Direct soil emissions, Indirect N2O from agriculture, Other direct soil emissions
<b>Agriculture - meat and dairy</b>	Bovine meat, other animal products, other meat, dairy	Enteric fermentation, Manure management, Manure in pasture/range/paddock
<b>Wood, paper, food, beverages, tobacco</b>	Wood and paper, beverage and tobacco	Production of pulp/paper/food/drink
<b>Coal mining</b>	Coal	Fugitive emissions from solid fuels
<b>Oil and gas</b>	Oil, gas	Fugitive emissions from oil and gas
<b>Chemicals, rubber, plastic</b>	Chemicals	Production of chemicals, Solvent and other product use: paint, Solvent and other product use: degrease, Solvent and other product use: chemicals, Solvent and other product use: other
<b>Petroleum, coal products</b>	Oil products	Other Energy Industries, Non-energy use of lubricants/waxes (CO <sub>2</sub> )
<b>Metal products</b>	Metal products	Production of metals
<b>Non metal products</b>	Non metal products	Cement production, Lime production, Limestone and dolomite use, Soda ash production and use, Production of other minerals

<b>Machinery, electronic equipment and other manufacture</b>	Machinery, electronic equipment and other manufacture	Manufacturing Industries and Construction
<b>Electricity</b>	Electricity	Public electricity and heat production
<b>Utility</b>	Utility	Wastewater handling
<b>Transport</b>	Transport	Domestic aviation, Road transportation, Rail transportation, Inland navigation, Other transportation
<b>Services</b>	Communication services, financial services, other services	Residential and other sectors, Solid waste disposal on land, Waste incineration, Other waste handling

Source: Trinomics based on EDGAR and economic modelling results

In the second step, the expected output growths (for the conservative and ambitious scenarios) from the economic modelling results were aligned with the new sector definition. The output growth of a certain environmental analysis sector (e.g. Agriculture – meat and dairy) was set equal to the weighted average output growth of all corresponding economic modelling sectors (e.g. bovine meat, other animal products, other meat, dairy). The weights were defined as the share of output in 2030 of a certain economic modeling sector (e.g. bovine meat) in the sum of outputs values of all economic modeling sectors (e.g. bovine meat, other animal products, other meat, dairy) corresponding to a certain environmental analysis sector (e.g. Agriculture – meat and dairy).

In the third step, the EDGAR emission data were distributed over the environmental analysis sector. This resulted in:

1. The 2012 baseline GHG emissions/air pollutants per environmental analysis sector; and
2. The expected output growth per environmental analysis sector.

For the GHGs, a **fourth step** was performed, in which the EDGAR emissions (which are only available until 2012) were updated based on emission projections from EPA to estimate the 2030 baseline emissions. EPA published emission projections for non-CO<sub>2</sub> GHGs, with the following details:

- Geographical scope: all countries in the world
- Period: 2015-2050
- Sectors: energy, industrial processes, agriculture and waste

Based on the EPA data, the percentage change in non-CO<sub>2</sub> emissions between 2010 and 2030 was calculated at a sector level (per country). The EDGAR 2010 emissions were then multiplied by the percentage change (indexed) in emissions in the relevant sector and country. The following sector matching was applied:

EPA sector	Environmental analysis sectors
<b>Agriculture</b>	(i) Agriculture - rise, (ii) agriculture – horticulture and (iii) agriculture – meat and dairy
<b>Industrial processes</b>	(i) Wood, paper, food, beverages, (ii) chemicals, rubber, plastic, (iii) petroleum, coal products (iv) metal products (v), non-metalic minerals and (vi) machinery, electronic equipment and other manufacture
<b>Energy</b>	(i) Coal mining, (ii) oil and gas, (iii) electricity and (iv) utility
<b>Average</b>	(i) Transport and (ii) services

It was chosen to use the EPA projections because it was deemed more robust to use projections from a single source for all countries (rather than country specific sources which each might rely on a different set of assumptions). In order to verify the robustness of this approach, a sensitivity analysis was performed by using emission projections from other sources (such as the third biennial reports to the UNFCCC), which did not lead to substantially different outcomes. This step resulted in the 2030 baseline emissions at sector level.

In the **fifth step**, the 2030 baseline emissions were multiplied with the expected output growth in the conservative and ambitious scenarios. The difference between the baseline 2030 emissions

and the emissions in case of a conservative/ambitious FTA are defined as the effect of the FTA on the emissions/air pollutants in a certain environmental sector.

The quantitative analysis separates the scale effect, composition effect and total effect, which were calculated as follows:

1. Scale effect: national emissions in 2030 times overall output growth;
2. Composition effect: the sum of all environmental analysis sector effects (as described in this methodological note) minus the scale effect; and
3. Total effect: scale effect plus composition effect.





### **III. ANNEX III: STATE OF PLAY DESCRIPTIONS**

#### **III.1 Economic state of play**

The EU and Australia have been conducting their trade and economic relations under the 2008 EU-Australia Partnership Framework, which aims at facilitating EU-AUS trade in industrial products by reducing technical barriers and by improving bilateral trade in services. These ties have been strengthened in 2017 with the signature of the EU-Australia Framework Agreement containing several economic and trade cooperation arrangements.

##### **Merchandise trade**

In 2018, Australia ranked as the 19th-largest trade in goods partner of the EU, while the EU represented Australia's third-largest trading partner after China and Japan. Total trade in goods accounted for €47.6 billion in 2018 (EU imports €11.6 billion, EU exports €36.0 billion), and total trade in services added another €32.9 billion in 2017 (EU imports €9.5 billion, EU exports €23.5 billion).

In terms of composition of EU imports from Australia (see Table III.1.1), primary products are by far the most important product group (58.7 percent), with manufactures (20.4 percent) and other products (18.8 percent) making up for the remaining 40 percent. In contrast, the composition of EU exports to Australia is dominated by manufactures (86.9 percent), followed by primary products (11.0 percent). Almost half of EU-AUS exports (47.7 percent) comprise machinery and transport equipment followed by chemicals and related products (18.8 percent). Miscellaneous manufactured articles (12.1 percent), manufactured goods (classified chiefly by material; 9.3 percent) and food and live animals (9.9 percent) make up for the remaining third. Australia's applied tariffs on these imports from the EU are already low, suggesting limited scope from a tariff liberalization perspective.

##### **Agricultural products**

Trade in agricultural products is important in the EU-AUS trading relationship. According to UN Comtrade data, agricultural products comprised 2.5 percent of the EU's extra-EU exports to Australia in 2018 (€3.4 billion in value) and 1.8 percent of the EU's extra-EU imports from Australia (€2.1 billion in value). The EU in particular imported oilseeds etc. (share of 28.0 percent in EU-AUS bilateral imports) from Australia in 2018, and wine, vermouth, vinegar (22.0 percent of EU-AUS bilateral imports). At the same time, for EU exporters Australia is an important market for several agricultural products, especially meat and edible meat; and animal products; and beverages, spirits and vinegar.

At the same time, for EU exporters, Australia is an important market for several agricultural products, especially meat and edible meat; live animals and animal products; and beverages, spirits and vinegar. In fact, the share of EU's exports to Australia in Australia's total imports from the world exceeded 10 percent for 19 of the 24 HS2 products in 2017. For Australian farmers and food manufacturers, the EU is a particularly important export destination for lac, gums and raisins, vegetable plaiting materials, and oilseeds. The share of EU's imports from Australia in Australia's total exports to the world exceeded 10 percent for 6 of the 24 HS2 products in 2017.

Before looking at the different facets of the EU-Australia relationship, it is worth noting that since 2001 there is a permanent mechanism for dialogue and consultation on trade topics related to agriculture, called ATMEG (Agricultural Trade and Marketing Experts Group). ATMEG is held annually, alternately in Europe and in Australia.

Agricultural production in Australia and the EU is fundamentally different both in terms of specific sector output and the regulatory framework. One general observation might place Australian exports, except for wines and spirits, rather at the beginning of the food value chain, whereas the EU exports more processed food. As a regulatory collateral, this might

also explain the sometimes considerable NTMs for human health reasons, further discussed below.

After oilseeds, Australian wines are the second most important export to the EU in terms of value. Wines were also the largest EU export to Australia in 2017. One negotiation issue worth noting, given the very important trade volumes on both sides, are the excise tax rates for whisky and other spirits products.

Australia produced approximately 2.34 million tons cwt of beef and veal of which 74 percent were exported. Australian exports of ruminant meat to the EU are important for Australia. Between 2011 and 2015, Australian exports of beef meat to the EU roughly doubled to 31,000 tons, while its exports of sheep and goat meat remained stable at about 19,000 tons. Australia's exports of ruminant meat amounted to €211 million in 2015, the EU exports were almost zero. This is mainly due to the sanitary import measures in Australia. Australia enforces restrictions and cumbersome approval processes on imports of bovines and products relating to Bovine Spongiform Encephalopathy (BSE). Therefore, even though Australia imposes zero tariffs on EU imports of ruminant meat products, import into Australia is not yet possible. If Australia's regulations were lifted, EU market access for fresh/frozen, deboned meat, would improve considerably. The EU is the world's second-biggest pork producer after China, with the world's largest (and growing) trade surplus and about €6 billion of exports mainly to East Asia. EU suppliers also offer a highly diversified range of pork meat products. Among the EU's top agri-food exports to Australia, pork meat (fresh, chilled and frozen) ranked seventh in 2018. EU exports of pork meat almost doubled between 2011 and 2018 when it reached €240 million.

The respective EU-Australia market access conditions are essentially determined by applied tariffs and, for certain products by tariff-rate quotas (TRQ).

*Tariffs:* According to the WTO Trade Profiles for 2015, the EU average simple MFN rates were 10.7 percent for agricultural goods, while Australia's MFN applied non-ad valorem tariff rates for agricultural goods were only 1.2 percent. The EU imposes particularly high tariffs on several Australian imports including agricultural commodities such as sugar, wheat, and wine. Both the EU and Australia apply high excise and border taxes for tobacco.

Notwithstanding its low average tariff rates, Australia has relatively high final bound duties in several product groups. The highest average tariffs apply for beverages & tobacco (10.3 percent, followed by sugars and confectionary (6.8 percent). The highest ad valorem duty or calculated AVE within these product groups were 16 percent (dairy products). Dairy products (3.4 percent) and coffee, tea (3.9 percent) as well as fruit, vegetables, plants (3.7 percent) show high average bound tariffs too. In the case of fruit, vegetables and plants, individual duties are as high as 29 percent. Note that currently MFN applied duties are lower for these product groups. However, in the case of dairy products, the highest duties remain at 16 percent.

*TRQs:* For more sensitive agricultural products especially the EU but also Australia apply preferential tariffs or duty-free treatment only for limited quantities. Additional quantities are then subject to the MFN or a preferential but higher applied duty rate. Some of these TRQs were negotiated in the Uruguay Round, in order to safeguard so-called "current" and "minimum" market access. They appear in the WTO schedules of concessions of the EU and of Australia.

The EU has many TRQs for beef, dairy, sugar and other imports. Some are open to all traditional suppliers, some others for preferential suppliers only. As an example, for the first allocation, the EU in 1996 included Australia for access to two rice TRQs totaling 83,000 tons. Australia also benefits from two EU export dairy quotas, for cheddar cheese and for cheese for processing. In 1996, the TRQ quantities for cheddar from Australia were increased by 750 tons as a result of the EU enlargement negotiations under GATT-Article XXIV:6. For beef, the EU offers a (shared) access to a 48,200 tons of grain-fed beef quota with a zero percent in-quota tariff. There is an additional TRQ of 7,150 tons for Australian "high quality" beef, subject to a 20 percent in-quota tariff. For out-of-quota imports the

tariff is 12.8 percent plus up to €3 per kilogram. As for sheep and goat meat, the 19,186-ton country specific quota enjoys a zero in-quota duty. Above this quota, duties of 12.8 percent plus up to €3.1 per kilogram apply. In addition, offal, by-products and prepared meat face tariffs of up to 16.6 percent or €3 per kilogram.

Australia has TRQs only for certain cheeses, allocated on an *erga omnes* basis. Its TRQ for unmanufactured tobacco has not been implemented since 1 January 1995.<sup>6</sup> The Department of Agriculture and Water Resources' Quota Unit administers 33 export quotas for exports to the EU (Dairy, High-quality beef and grain-fed beef, Sheep meat and goatmeat, and *erga omnes* sheep meat and goat meat), similarly for exports to Japan (Apple juice, Bovine offal, Honey, Orange juice, Pork, Poultry, Preserved meats 1 and 2) and to the USA (Beef, Dairy). The way a quota certificate is issued depends on the product and its destination. Some quotas are not allocated, and certificates are issued on a first-come-first-serve basis.<sup>7</sup> Australia also has other trade-limiting measures in place, such as market-offer concentrations (i.e. Export State Trading), such as in the rice sector.

TRQs raise several issues in international negotiations. First, the allocation of WTO-enshrined TRQs in an FTA may come at the expense of third countries. A second potential conflict could arise from the preferential TRQ volumes. Moreover, most TRQ allocation methods – except “first come first served” – have been criticized as “non-automatic import licenses”. Hence, the relevant WTO anti-discrimination disciplines (e.g. GATT-Articles XIII and XXIV, Agreement on Import Licensing Procedures), as well as possible third country rights and claims, should be considered in the EU-AUS FTA negotiation as well, in order to avoid legal claims by third countries.

*Non-tariff measures:* While agricultural trade is in many instances facing high tariffs (MFN and applied), NTMs are often even more important. Moreover, NTMs based on health policies may amount to actual import prohibitions – unless successfully challenged in dispute settlement as NTBs.

Domestic production standards in Australia are seldom harmonized with or equivalent to EU standards. Only EU wine exports to Australia enjoy standard recognition by way of a Mutual Recognition Agreement (MRA).<sup>8</sup> Nevertheless, the high tariff rates of over 20 percent for bulk wine exports are seen as the main reason for trade diversion, despite the MRA, because wine from main competitors like Chile and South Africa already enters the EU duty-free. In the eventuality of a successful conclusion of EU-US trade negotiations (if some agriculture were to be included) and the EU-Mercosur FTA, Australia and New Zealand would remain the only countries among the top ten suppliers that would have to pay MFN tariff rates for wine in the EU.

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<sup>6</sup> WTO Document G/AG/N/AUS/122 dated 28 January 2019

<sup>7</sup> Department of Agriculture and Water Resources, at <http://www.agriculture.gov.au/export/from-australia/quota> (29 March 2019)

<sup>8</sup> The bilateral Agreement on Trade in Wine (1994) provided for the mutual recognition of winemaking practices as well as recognition of geographical indications and traditional expressions. The Agreement also required Australia to phase-out the use of names from certain European regions. Another immediate benefit was the reduction in analytical requirements for the European Import Certificate. It does not provide for any tariff concessions. In 2010, this agreement was replaced by a new agreement, guaranteeing and improving reciprocal access for Australian wine producers to the European market and European wines vice versa. It recognizes winemaking techniques, and it simplifies the requirements covering everything from labelling and blending rules to alcohol levels. It also foresees a simplified procedure for the recognition of future standards. Registered GIs in both partners are mutually recognized. This implied a phase-out of European regional denominations used in Australia, and an extension of the protection for traditional expressions and names (e.g. Bordeaux, Burgundy, Champagne, and Chablis, with more flexible phase-outs for Port, Sherry, and Tokay).

It should also be mentioned that, in order to control problem drinking and alcohol abuse at young age (notably binge drinking), Australia increased the tax on spirit-based “ready-to-drink” (alcopops, which designates sweetened alcoholic beverages) to the same as the excise rate applying to spirits to increase the prices of such spirit-based drinks and other alcoholic beverages that mimic those alcopops, and made new definitions of beers and wines. Thus, beer-based drinks that mimic “alcopops” became taxed at the same rate as the latter. The changes were introduced by the Excise Tariff Amendment (2009 Measures No. 1) Act 2009 and the Customs Tariff Amendment (2009 Measures No. 1) Act 2009, amending the Excise Tariff Act 1921 and the Customs Tariff Act 1995.

Under the present circumstances tariff reductions are a key requirement for a successful FTA. Nevertheless, the ironing out of more standard differences acting as NTMs with the new FTAs should be a top priority. Chances for this negotiation are good despite earlier, less successful attempts. In the meantime, both the EU and Australia have already concluded several MRAs with other countries such as the USA, or Canada. The EU-AUS FTA could therefore at least partly close a triangle, including for trade in intermediary products, for instance milk powder, or hazelnuts for organic chocolate production. Moreover, under different FTAs and within their own Customs Union, Australia is engaged in ambitious “WTO Plus” programmes of standard harmonization and regulatory cooperation, namely for sanitary standards and technical trade barriers. For food standards, MRAs could also be envisaged for certification processes – even where the three parties will continue to diverge fundamentally, such as on GMOs and growth hormones for beef, and (more recently) pork (Ractopamine).

Even a summary listing and description of the main NTMs applying to EU exports to Australia shows important negotiating issues. They are listed here in order of importance to concerned stakeholders.

- Human and animal health protection measures, biodiversity and biosecurity measures, and strict import certification procedures by at least two government agencies. For instance, the EU sees an important trade barrier in the fact that, for animal health reasons, all pork meat imports must be cooked (Pork Biosecurity Import Risk Assessment). One reason for this requirement is several diseases absent in Australia but allegedly endemic in some European countries. This is also the case for poultry meat import procedures where strict import certification procedures cause significant barriers to market access.
- Important trade barriers remain for fresh fruits and vegetable exports from Europe. This problem is exacerbated by the absence of binding, multilateral phytosanitary standards for plant health.
- Import approval procedures for each EU member state are considered as additional trade barriers, unnecessary in view of the Single Market common standards, and cumbersome especially when deviating without justification from relevant Codex and OIE rules.
- The main concern Australia raised with EU import regulations is about the Export Refund System (ERS), aimed at detecting its impact on the stability of the EU market for fruit and vegetables, as NTBs.

*Subsidies:* Domestic farm policies may have a trade impact, especially if they involve price or product support measures. No FTA so far has established disciplines limiting such agricultural support beyond the present WTO rules and limits. This means that the EU FTA with Australia is unlikely to act as an external constraint on agricultural policy space for the trading partners – including by way of structural adjustment support possibly arising as a result of future market developments, or as required by the implementation of the Paris Agreement on Climate Change. Nonetheless, after the conclusion of the EU-AUS FTA, trade-impacting NTMs and subsidies can always be addressed in the appropriate joint committees.

*FDI incentives and restrictions:* In both the EU and Australia, foreign investment is welcome in the food processing industry, for instance dairy. Europeans invest substantially in Australian agricultural businesses. In 2014, EU investment income from FDI held in Australia amounted to €9.5 billion. Australia’s direct investment flows to the EU fluctuated relatively strongly in the past, showing FDI outflows from Australia of €657 million in 2014. Australia, where 11 percent of agricultural land is foreign owned, refused certain large-scale land purchases by Chinese investors. Its biggest dairy was sold to a China-based milk processor, accompanied by new laws with safeguards against tax minimization by foreign firms. Certain non-resident foreigners are finding it difficult, if not legally impossible, to buy large areas of farmland. For investment policies in respect of the food value chain, there would probably be only few problems. If the negotiators do not want to fundamentally alter the regulatory framework for agricultural investments in the investment chapter of their FTA, a clearer understanding on the line between the primary and secondary sector

might be advisable. This should also include a relaxation of screening limits in the Australian foreign investment regulation. Indeed, an understanding on where agricultural FDI is welcome might increase two-way food investments – not least for exports to third markets like China.

### **Services trade**

The EU is Australia's largest services trading partner, with an overall volume of more than €32.7 billion in 2017 (€23.4 billion exported to Australia, €9.5 billion imported into the EU; see Table III.1.2). EU's largest services import from Australia in 2017 was travel services, which accounted for 36 percent of the EU's total services imports from Australia. Business services (25.8 percent) and transport (17.9 percent) comprised the remaining major EU services imports from Australia. EU's largest service export to Australia in 2017 was also travel services (25.2 percent) while transport, telecoms and other business services accounted for the remaining major EU service exports to Australia.

### **Investment**

The EU is also Australia's largest foreign direct investment (FDI) partner, with inward FDI flows and stocks in Australia from the EU at €10.3 bln and €130.3 bln in 2017, respectively, amounting to 25 percent and 22.2 percent of total Australian inward FDI flows and stocks (see Table III.1.3).

Australia's foreign investment policy framework comprises the Foreign Acquisitions and Takeovers Act 1975 and related regulations. To protect its interests whilst maximizing investment flows, certain foreign acquisitions of Australian shares and assets are reviewed by the Australian Foreign Investment Review Board (FIRB).

#### *Investment screening thresholds*

The main investment barrier EU investors face in Australia are stricter investment screening thresholds compared to investors from other countries (e.g. the US, China, and the CPTPP member states) that have already concluded FTAs with Australia. Australia's Foreign Investment Policy provides guidance on what factors are typically considered in assessing whether an investment proposal is contrary to the national interest. The concept of national interest includes factors such as national security, competition, the impact on other Australian Government policies (such as tax and environmental policy), the impact on the economy and the community, and the character of the investor. Where a proposal involves a foreign government or a related entity, the Government also considers the commerciality of the investment.

Investment by a foreign entity in Australia may require the formal submission of a proposal. This is subject to approval by the Australian Foreign Investment Review Board (FIRB). The FIRB examines proposals and advises the Australian Government on whether those proposals are suitable for approval under the Government's policy. Whether a proposal is required to be submitted to FIRB by the investor depends on the monetary value, the nature of the investment, and type of investor.

#### *Monetary thresholds*

One of the tests in determining whether an action is a significant action under the Foreign Acquisitions and Takeovers Act 1975 is whether the monetary screening threshold test is met. Monetary screening thresholds are indexed annually on 1 January using the GDP implicit price deflator (except for the AUS\$15 million agricultural land threshold and the AUS\$50 million land threshold for investors from Thailand, which are not indexed). As the GDP implicit price deflator did not increase this year, the monetary thresholds in Table below remained in place in 2019.

*Table: Non-land proposals*

Investor	Action	Threshold – more than:
From FTA partner countries that have the higher threshold <sup>(a)</sup>	Acquisitions in non-sensitive businesses	\$1.154 million
	Acquisitions in sensitive businesses <sup>(b)</sup>	\$266 million
	Media sector <sup>(c)</sup>	\$0
	Agribusinesses	For Chile, New Zealand and United States, \$1.154 million For Canada, China, Japan, Korea, Mexico and Singapore, \$58 million (based on the value of the consideration for the acquisition and the total value of other interests held by the foreign person [with associates] in the entity)
Other investors	Business acquisitions (all sectors)	\$266 million
	Media sector	\$0
	Agribusiness	\$58 million (based on the value of the consideration for the acquisition and the total value of other interests held by the foreign person [with associates] in the entity)
Foreign government investors	All direct interests in an Australian entity of Australian business	\$0
	Starting a new Australian business	\$0

(a) Agreement country investors are Canadian, Chilean, Chinese, Japanese, Mexican, New Zealand, Singaporean, South Korean and United States investors, except foreign government investors, and any country for which TPP-11 subsequently comes into force. TPP-11 entered into force for Vietnam on 14 January 2019.

(b) Sensitive businesses include media; telecommunications; transport; defence and military related industries and activities; encryption and securities technologies and communications systems; and the extraction of uranium or plutonium; or the operation of nuclear facilities.

(c) For investment in the media sector, a holding of at least five per cent requires notification and prior approval regardless of the value of investment.

*Table: Land proposals*

Investor	Action	Threshold – more than:
All investors	Residential land	\$0
Privately owned investors from FTA partner countries that have the higher threshold	Agricultural land	For Chile, New Zealand and United States, \$1.154 million For Canada, China, Japan, Korea, Mexico and Singapore, \$ 15 million (cumulative)
	Vacant commercial land	\$0
	Developed commercial land	\$1.154 million
	Mining and production tenements	For Chile, New Zealand and United States, \$1.154 million Others \$15 million (cumulative)
Privately owned investors from non-FTA countries and FTA countries that do not have the higher threshold	Agricultural land	For Thailand, where land is used wholly and exclusively for a primary production business \$50 million (otherwise the land is not agricultural land)
		Others \$ 15 million (cumulative)
	Vacant commercial land	\$0
	Developed commercial land	\$266 million
Foreign government investors		Low threshold land (sensitive land), \$ 58 million
	Mining and production-tenements	\$0
	Any interest in land	\$0

In addition to the requirements under the *Foreign Acquisitions and Takeovers Act 1975*, foreign investment in some sectors is also governed by specific legislation. The Foreign Investment Review Board considers these legislative requirements when examining investment proposals by foreign persons.

#### *Banking*

Foreign ownership in the banking sector must be consistent with the *Banking Act 1959*, the *Financial Sector (Shareholdings) Act 1998* and banking policy.

#### *Transport*

Aggregate foreign ownership in an Australian international airline (including Qantas) is limited to 49 per cent (see *Air Navigation Act 1920* and *Qantas Sale Act 1992*). The *Airports Act 1996* limits foreign ownership of some airports to 49 per cent, with a 5 per cent airline ownership limit; and imposes cross-ownership limits between certain airport operator companies. The *Shipping Registration Act 1981* requires a ship to be majority Australian-owned if it is to be registered in Australia, unless it is operated by a foreign resident under a demise charter and is exempted from the requirement to be registered during the term of the charter.

#### *Telecommunications*

Under the *Telstra Corporation Act 1991*, aggregate foreign ownership of Telstra is limited to 35 per cent and individual foreign investors are only allowed to own up to 5 per cent.

#### *National land register*

Under the Register of Foreign Ownership of Water or Agricultural Land Act 2015, foreign investors are required to report their existing agricultural landholdings and any acquisitions or disposals to the Australian Taxation Office regardless of the value of that land. All existing holdings were required to be registered with the Australian Taxation Office by 29 February 2016 and any new interests must be registered within 30 days of acquisition.

### **Tariffs and NTMs**

Table III.1.4 reports applied (AHS), bound (BND) and MFN tariffs, simple averages, in EU-Australia trade by HS2 Chapters. Australia highest bound tariffs are on textiles and clothing, but its applied tariffs (including on EU imports) are much lower. In contrast, the EU imposes high tariffs on several Australian imports including agricultural products and textiles and clothing.

The EU and Australia have concluded a Mutual Recognition Agreement (MRA) of conformity assessment procedures, covering eight sectors - automotive products, electromagnetic compatibility, low voltage equipment, machinery, medical devices, pressure equipment, telecommunications terminal equipment, and good manufacturing practice inspections of medicinal products - to facilitate trade by reducing technical barriers. The two countries also have an agreement on trade in wine which includes provisions for the reciprocal protection of Geographical Indications (GIs).

Table III.1.5 reports the OECD services trade restrictions indices for Australia and the EU. On average, the EU is more restrictive in its services trade policy than Australia, with an average overall STRI of 0.22 relative to 0.18 for Australia. The EU's services trade policy is particularly restrictive in air transport and legal services, while Australia is most restrictive in courier services.

### **Small- and Medium Sized enterprises**

The EC defines SMEs as follows: "The category of micro, small and medium-sized enterprises (SMEs) is made up of enterprises which employ fewer than 250 persons and which have an annual turnover not exceeding EUR 50 million, and/or an annual balance sheet total not exceeding EUR 43 million." (EC, 2016). A SME is thus categorized based on three factors: level of employment, level of turnover, and size of the balance sheet.

SMEs are the backbone of the EU economy. Based on the definition, there were 24.5 million SMEs active in the non-financial business sector across in 2017, which represents 99.8

percent of all non-financial businesses. SMEs employ approximately 66.4 percent of the total EU-28 employment, which amounts up to 90 million employees. SMEs also create 56.8 percent of the value added generated by the non-financial sector. In contrast, large enterprises in the EU-28 accounted for 46,547 enterprises, 47.9 million employees and 43.2 percent of the value added.

SMEs can be divided into five main business sectors: accommodation and food services, business services, construction, manufacturing, and wholesale and retail trade. Following Eurobarometer's SME survey of 2015 (fieldwork: June 2015), the majority are working in retail (42 percent) or the service sectors (36 percent). About 8 percent are working in manufacturing, with a slightly larger proportion in the industry sector (14 percent). However, the distribution of SMEs across sectors varies significantly across EU Member States.

In 2017, SMEs continued to grow at a moderate rate. SMEs generated an average increase of 3.5 percent in the value added and an average increase of 2.0 percent in employment. In contrast, in 2016 these figures were at 1.5 percent and 2.3 percent respectively. For 2019, SMEs are forecasted to continue to grow. The SME value added is estimated to increase by 4.3 percent. SME employment in is also expected to grow by 1.3 percent in 2019. On the member country basis, all member states expect their SME value added and employment to grow.

The official size class definition of SMEs in the EU differs from that applied in Australia. In Australia, there is no official definition of a small and medium-sized business. However, Australia has traditionally used the following definition in regulations: SMEs are generally defined as businesses with 200 or fewer employees (Australian Bureau of Statistics, 2002).

SMEs are the backbone of Australia's economy. Based on the definition there were 2.2 million SMEs active in 2017, which represents 99.8 percent of all businesses. SMEs employ approximately 67 percent of the total employment, which amounts up to 7.0 million employees. SMEs also constitute 57 percent of Australia's GDP. Australia subdivides its active businesses into five main categories: zero-, 1-4-, 5-19-, 20-199-, and 200 or more-employees. In 2017, there were 1.4 million businesses with zero-, 608,700 businesses with 1-4-, 203,400 businesses with 5-19-, 52,200 businesses with 20-199-, and 3,900 businesses with 200 or more- employees. Thus, 97.5 percent of the businesses have less than 20 employees. This large number in small SMEs can be explained via the high establishment rate of SMEs, as 50 percent of the firms have existed for less than ten years. SMEs account for 80 percent in the agriculture, forestry and fishing industry, 77 percent in the rental, hiring and real estate services industry, and 69 percent in the construction industry. As of 2011, the industries employed 494,000 people, 360,000 people, and 917,000 people, respectively.

Since 2011, SMEs continued to grow at a strong rate. 26 percent of the micro businesses and 33 percent of the small businesses stated in 2011 that their profitability had increased. Additionally, 22 percent of the micro businesses and 28 percent of the small businesses stated that their productivity had increased. For the following years to come, Australia's government states that predicting the future SME growth rates is difficult as SMEs are subject to the country's current economic fundamentals and their cyclicity. As Australia is currently in a positive economic environment, determined by low interest rates and low inflation, SMEs are facing periods of growth and prosperity. However, rising global economic uncertainties, decreasing demand and rising input costs could affect SMEs negatively.

For a great number of manufactured products ranging from wood products to machinery and electrical components, Australia applies different customs procedures. Although tariffs are already generally low for most manufacturing products, the obligation to fulfil complex customs procedures is a particular obstacle for EU SMEs. In addition, Australian regulators require specific product conditions and requirements for many manufactured products including wood products, textiles, chemical and (electrical) machinery products and such regulations are generally more difficult to fulfil by SMEs compared to large enterprises.



**Least Developed Countries**

LDCs represent the world's poorest states, which account for less than 2 percent of the global economy, for 1 percent of global trade in goods, and for less than 1 percent of global trade in services. Trade between the EU and African, Caribbean and Pacific (ACP) countries accounts for more than 5 percent of EU imports and exports, approximately €23.5 billion, making the EU a major trade partner for the majority of LDCs. LDCs export mostly agricultural goods, commodities, and transformed goods to the EU. The EU believes that it is required to support LDCs in their growth to enable these countries to benefit from international trade. The EU has signed 28 EPAs with the majority of ACP countries and also has 23 countries in the ACP region benefitting from a standard GSP agreement, 10 countries in the ACP, European and South American region benefitting from a GSP+ arrangement, and 49 countries in the ACP and Caribbean region benefitting from a Everything but Arms (EBA) agreement. In 2013, the EU provided €3 billion in Aid for Trade to LDCs through the European Development Fund, Development Cooperation Instrument, and the European Neighbourhood & Partnership Instrument. The EU also helps exporters in LDCs via its Trade Helpdesk, International Trade Centre, and Small Traders Capacity Building program.

In 2013, the total value of exports of LDCs to Australia amounted to approximately €721.8 million, making Australia an important market for LDCs. Australia believes that due to its scale in economic power and trade, it is required to support LDCs in their growth to enable these countries to benefit from international trade. Australia's focus of development and aid is the Indo-Pacific region, as it is in the country's proximity. Australia currently has granted 48 standard GSPs to LDCs. Australia also established the Official Development Assistance (ODA) as its aid expenditure platform. For 2018 to 2019, Australia allocated €3.7 billion in aid expenditures under its Australian Aid programme. Approximately 31 percent of the aid expenditure flows to LDCs in the Pacific region, 30.5 percent to Asia, 6.2 percent to Africa, and 0.1 percent to Latin America and the Caribbean. The remaining 32.2 percent consist of €502.5 million for the United Nations, Commonwealth, other international organizations, and cash payments to multilaterals, and of €657.2 million for humanitarian programmes and other ODAs not attributable to any particular region or LDC.

**Outermost Regions**

The EU currently has nine ORs located around the globe and these include five French overseas departments, one French overseas community, two Portuguese autonomous regions, and one Spanish autonomous community. The EU implemented specific measures in 2017 under COM (2017)0623 to build a stronger and sustainable partnership with the ORs. For 2014 to 2020, the EU has allocated €13.3 billion in structural and investment funds through the European Regional Development Fund, European Social Fund, European Agricultural Fund for Rural Development, European Agricultural Guarantee Fund, and European Maritime and Fisheries Fund.

**Overseas Countries and Territories**

EU's OCTs do not form part of the EU territory and the EU single market, yet they are required to comply with regulations and obligations enforced on third countries. The EU has 25 OCTs which are linked to the countries Denmark, France, the Netherlands, and the United Kingdom. OCTs represent a vital part of the EU, thus it is of high interest to support and improve the process of development in these regions. For 2014 to 2020, the EU allocated €364.5 million in structural and investment funds to through the EU budget, the 11<sup>th</sup> European Development Fund, and the European Investment Bank's EDF Fund.

Australia currently has seven OCTs remote from the mainland. These OCTs are Ashmore and Cartier Islands, Christmas Island, Cocos (Keeling) Islands, Coral Sea Islands, Heard and McDonald Islands, Norfolk Island, and Australian Antarctic Territory. The OCTs are very small in population size and thus profound bilateral development agreements do not exist. However, they represent an integral part of Australia and it is of high interest to the country to support and improve the process of development and the quality of life in these regions. Through regional development programmes, the overall Pacific region received

€933.2 million in 2018 to 2019, with a focus on improving governance, infrastructure, and agriculture, fisheries and water.

In the year 2017, mineral fuel, oil, etc. comprised 7.9 percent of total LDC exports to the EU while precious stones, pearls, etc. accounted for 20.7 percent of total NZ OCTs to the EU (see Table III.1.7). Both these products are also amongst the major Australian exports to the EU. Thus, LDC and NZ OCT exports of these products to the EU may be adversely affected by preferential liberalization under the EU-AUS FTA. Similarly, exports of nuclear reactors, boilers, machinery accounted for 10 percent of total NZ OCT exports to Australia in 2017 (see Table III.1.8). This is also a major EU export to Australia, which suggests that NZ OCT exports of nuclear reactors, boilers, machinery to Australia may also be adversely affected by preferential liberalization under the EU-AUS FTA.

Table III.1.1: EU's merchandise trade with Australia by HS Chapter (2010, 2017, values and % shares)

Product description	Value (€ mln)				Share of total trade (%)				Share of total EU trade (%)			
	Export		Import		Export		Import		Export		Import	
	2010	2017	2010	2017	2010	2017	2010	2017	2010	2017	2010	2017
Aircraft, spacecraft, and parts the	1454.6	500.7	155.2	37.5	5.5	1.5	1.2	0.3	1.8	0.4	0.2	0.0
Albuminoidal substances; modified s	39.8	76.8	21.7	11.2	0.1	0.2	0.2	0.1	0.5	0.6	0.3	0.1
Aluminum and articles thereof	164.1	170.4	32.4	41.8	0.6	0.5	0.2	0.3	0.4	0.3	0.1	0.1
Animal or vegetable fats and oils a	108.4	121.1	13.7	14.3	0.4	0.4	0.1	0.1	0.7	0.5	0.1	0.1
Arms and ammunition; parts and ...	21.4	40.1	4.2	9.8	0.1	0.1	0.0	0.1	0.8	1.1	0.2	0.5
Articles of apparel and clothing ac	154.4	407.6	12.6	23.7	0.6	1.2	0.1	0.2	0.2	0.4	0.0	0.0
Articles of iron or steel	399.5	600.4	34.6	36.6	1.5	1.8	0.3	0.3	0.5	0.6	0.1	0.0
Articles of leather; saddlery and h	45.5	164.4	3.8	24.1	0.2	0.5	0.0	0.2	0.4	0.6	0.0	0.1
Articles of stone, plaster, cement,	89.8	158.8	2.5	8.5	0.3	0.5	0.0	0.1	0.7	0.9	0.0	0.1
Beverages, spirits and vinegar	369.6	704.9	849.5	515.3	1.4	2.1	6.5	4.0	0.9	1.1	2.9	1.4
Carpets and other textile floors	32.3	35.6	1.4	0.4	0.1	0.1	0.0	0.0	0.8	0.7	0.0	0.0
Ceramic products	99.2	173.1	3.0	8.7	0.4	0.5	0.0	0.1	0.7	1.0	0.0	0.1
Cereals	3.8	8.0	54.0	75.4	0.0	0.0	0.4	0.6	0.0	0.0	0.4	0.4
Clocks and watches and parts	12.2	18.3	0.8	1.2	0.0	0.1	0.0	0.0	0.3	0.2	0.0	0.0
Cocoa and cocoa preparations	129.6	228.1	2.9	1.7	0.5	0.7	0.0	0.0	0.9	1.0	0.0	0.0
Coffee, tea, mate and spices	60.5	101.5	1.7	2.6	0.2	0.3	0.0	0.0	1.0	1.0	0.0	0.0
Commodities not specified according	535.3	279.1	153.4	206.2	2.0	0.8	1.2	1.6	0.6	0.3	0.3	0.4
Copper and articles thereof	53.4	73.4	6.8	3.7	0.2	0.2	0.1	0.0	0.1	0.2	0.0	0.0
Cork and articles of cork	15.5	24.3	0.4	0.3	0.1	0.1	0.0	0.0	1.4	1.7	0.1	0.0
Cotton	8.3	5.3	0.6	1.2	0.0	0.0	0.0	0.0	0.1	0.1	0.0	0.0
Dairy produce; birds' eggs; natural	96.2	248.5	23.4	3.8	0.4	0.7	0.2	0.0	0.3	0.5	0.1	0.0
Edible fruit and nuts; peel of citrus	15.9	21.9	63.8	177.2	0.1	0.1	0.5	1.4	0.1	0.1	0.2	0.4
Edible vegetables and certain roots	12.8	29.4	38.2	34.8	0.0	0.1	0.3	0.3	0.1	0.1	0.2	0.1
Electrical machinery and equipment	2240.2	2434.1	311.2	351.6	8.4	7.1	2.4	2.7	0.6	0.5	0.1	0.1
Essential oils and resinoids; perfume	418.4	442.2	38.8	72.6	1.6	1.3	0.3	0.6	1.0	0.7	0.1	0.2
Explosives; pyrotechnic products; m	17.5	27.4	0.1	0.3	0.1	0.1	0.0	0.0	1.9	2.5	0.0	0.0

	Value (€ mln)				Share of total trade (%)				Share of total EU trade (%)			
	Export		Import		Export		Import		Export		Import	
Product description	2010	2017	2010	2017	2010	2017	2010	2017	2010	2017	2010	2017
Fertilisers	47.6	43.5	1.4	2.7	0.2	0.1	0.0	0.0	0.5	0.5	0.0	0.0
Fish and crustaceans, molluscs and	17.0	84.8	17.3	13.4	0.1	0.2	0.1	0.1	0.1	0.4	0.1	0.0
Footwear, gaiters and the like; par	80.4	156.4	7.6	8.2	0.3	0.5	0.1	0.1	0.3	0.4	0.0	0.0
Furniture; bedding, mattresses, mat	313.6	488.8	16.3	51.9	1.2	1.4	0.1	0.4	0.6	0.6	0.0	0.1
Fur skins and artificial fur; man...	0.5	3.5	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0
Glass and glassware	101.2	133.7	3.8	6.6	0.4	0.4	0.0	0.1	0.5	0.5	0.0	0.0
Headgear and parts thereof	8.3	19.6	2.7	1.3	0.0	0.1	0.0	0.0	0.6	0.8	0.1	0.0
Impregnated, coated, covered or lam	36.3	32.4	1.3	0.9	0.1	0.1	0.0	0.0	0.6	0.4	0.0	0.0
Inorganic chemicals; (in)organic	57.4	70.9	243.5	117.3	0.2	0.2	1.9	0.9	0.2	0.3	0.8	0.4
Iron and steel	241.5	201.2	103.3	58.4	0.9	0.6	0.8	0.5	0.2	0.2	0.1	0.0
Knitted or crocheted fabrics	9.2	20.7	0.5	0.4	0.0	0.1	0.0	0.0	0.3	0.5	0.0	0.0
Lac; gums, resins and other vegetables	12.3	24.3	5.1	10.7	0.0	0.1	0.0	0.1	0.7	1.1	0.3	0.5
Lead and articles thereof	2.4	1.8	346.7	411.7	0.0	0.0	2.7	3.2	0.1	0.1	17.4	13.4
Live animals; animal products	22.5	51.2	9.9	3.9	0.1	0.2	0.1	0.0	0.3	0.4	0.1	0.0
Live trees and other plants; bulbs,	17.9	13.4	7.5	4.3	0.1	0.0	0.1	0.0	0.2	0.1	0.1	0.0
Man-made filaments	40.3	57.8	0.9	0.4	0.2	0.2	0.0	0.0	0.6	0.8	0.0	0.0
Man-made staple fibers	19.8	14.4	1.1	1.4	0.1	0.0	0.0	0.0	0.3	0.2	0.0	0.0
Manufactures of straw	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	0.0	0.0
Meat and edible meat offal	133.0	255.0	176.8	277.4	0.5	0.7	1.4	2.1	0.4	0.5	0.6	0.7
Mineral fuels, mineral oils and pro	32.5	55.6	3165.1	3488.0	0.1	0.2	24.4	26.9	0.0	0.0	0.6	0.7
Miscellaneous articles of base meta	178.8	194.2	5.4	6.5	0.7	0.6	0.0	0.1	1.0	0.8	0.0	0.0
Miscellaneous chemical products	355.9	400.7	30.2	46.1	1.3	1.2	0.2	0.4	0.7	0.5	0.1	0.1
Miscellaneous edible preparations	195.6	394.2	9.9	11.5	0.7	1.2	0.1	0.1	1.0	1.4	0.1	0.1
Miscellaneous manufactured articles	45.2	59.9	1.3	2.7	0.2	0.2	0.0	0.0	0.7	0.7	0.0	0.0
Musical instruments; parts and accessories	12.8	18.8	2.0	1.9	0.0	0.1	0.0	0.0	1.0	1.1	0.1	0.1

Product description	Value (€ mln)				Share of total trade (%)				Share of total EU trade (%)			
	Export		Import		Export		Import		Export		Import	
	2010	2017	2010	2017	2010	2017	2010	2017	2010	2017	2010	2017
Natural or cultured pearls, precious stones	364.4	265.1	3139.6	2485.6	1.4	0.8	24.2	19.2	0.5	0.3	3.7	2.6
Nickel and articles thereof	13.7	16.4	484.7	152.7	0.1	0.0	3.7	1.2	0.3	0.3	6.2	2.3
Nuclear reactors, boilers, machinery	4502.6	6263.4	365.5	301.8	16.9	18.4	2.8	2.3	0.8	0.9	0.1	0.1
Oil seeds and oleaginous fruits; mi	28.3	70.1	152.9	1083.4	0.1	0.2	1.2	8.4	0.3	0.5	1.1	5.3
Optical, photographic, cinematography	1555.5	1938.1	566.1	656.5	5.8	5.7	4.4	5.1	1.2	1.0	0.5	0.4
Ores, slag and ash	0.9	33.1	1067.0	817.4	0.0	0.1	8.2	6.3	0.0	0.3	3.7	2.8
Organic chemicals	455.7	681.3	41.1	51.9	1.7	2.0	0.3	0.4	0.4	0.5	0.0	0.0
Other base metals; cermets; article	12.6	24.2	7.6	14.0	0.0	0.1	0.1	0.1	0.4	0.5	0.2	0.2
Other made up textile articles; set	31.1	46.7	2.5	4.3	0.1	0.1	0.0	0.0	0.4	0.4	0.0	0.0
Other vegetable textile fibers; pap	2.9	4.2	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.4	0.0	0.0
Paper and paperboard; articles of p	599.4	491.2	46.4	30.2	2.2	1.4	0.4	0.2	0.8	0.6	0.1	0.0
Pharmaceutical products	3516.4	3746.9	390.3	291.9	13.2	11.0	3.0	2.3	1.5	1.2	0.2	0.1
Photographic or cinematographic goo	32.3	21.2	1.1	0.0	0.1	0.1	0.0	0.0	0.6	0.5	0.0	0.0
Plastics and articles thereof	634.2	756.4	68.0	65.8	2.4	2.2	0.5	0.5	0.4	0.4	0.0	0.0
Preparations of cereals, flour	177.4	349.6	7.9	6.0	0.7	1.0	0.1	0.0	0.8	1.0	0.0	0.0
Preparations of meat, of fish	22.8	37.3	2.3	2.7	0.1	0.1	0.0	0.0	0.2	0.2	0.0	0.0
Preparations of vegetables, fruit,	152.5	251.3	17.9	5.8	0.6	0.7	0.1	0.0	0.9	1.0	0.1	0.0
Prepared feathers and down	0.5	1.9	0.2	0.4	0.0	0.0	0.0	0.0	0.2	0.5	0.0	0.0
Printed books, newspapers, pictures	192.0	317.9	12.3	11.7	0.7	0.9	0.1	0.1	1.1	1.8	0.1	0.1
Products of animal origin, not else	5.0	4.5	12.6	13.9	0.0	0.0	0.1	0.1	0.2	0.1	0.5	0.4
Products of the milling industry; m	10.8	39.1	0.7	3.5	0.0	0.1	0.0	0.0	0.2	0.6	0.0	0.1
Pulp of wood	2.6	9.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0
Railway or tramway locomotives	304.3	125.8	6.2	6.0	1.1	0.4	0.0	0.0	2.7	1.0	0.1	0.1
Raw hides and skins (other than furs	14.8	13.1	93.1	57.6	0.1	0.0	0.7	0.4	0.2	0.1	1.3	0.7
Residues and waste from the food in	24.0	112.5	7.5	5.9	0.1	0.3	0.1	0.0	0.2	0.5	0.0	0.0

	Value (€ mln)				Share of total trade (%)				Share of total EU trade (%)			
	Export		Import		Export		Import		Export		Import	
Product description	2010	2017	2010	2017	2010	2017	2010	2017	2010	2017	2010	2017
Rubber and articles thereof	240.8	315.8	8.3	34.6	0.9	0.9	0.1	0.3	0.5	0.5	0.0	0.1
Salt; sulphur; earths and stone; pl	13.6	18.1	71.2	76.6	0.1	0.1	0.5	0.6	0.1	0.2	0.7	0.7
Ships, boats and floating structure	112.6	130.5	90.5	91.8	0.4	0.4	0.7	0.7	0.5	0.6	0.3	0.5
Silk	1.4	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.1	0.0	0.0
Soap, organic surface-active agents	98.9	152.5	4.1	11.7	0.4	0.4	0.0	0.1	0.5	0.6	0.0	0.1
Special woven fabrics; tufted textiles	10.0	8.6	0.3	0.4	0.0	0.0	0.0	0.0	0.4	0.3	0.0	0.0
Sugars and sugar confectionery	34.1	60.7	3.5	5.5	0.1	0.2	0.0	0.0	0.4	0.5	0.0	0.0
Tanning or dyeing extracts; tannins	155.0	187.3	6.8	18.8	0.6	0.5	0.1	0.1	0.6	0.5	0.0	0.1
Tin and articles thereof	4.9	2.9	0.1	0.8	0.0	0.0	0.0	0.0	0.8	0.3	0.0	0.1
Tobacco and manufactured tobacco	53.2	87.0	0.0	0.0	0.2	0.3	0.0	0.0	0.4	0.5	0.0	0.0
Tools, implements, cutlery, spoons	143.2	144.8	12.2	10.8	0.5	0.4	0.1	0.1	0.9	0.7	0.1	0.1
Toys, games and sports requisites;	151.1	158.8	29.3	26.5	0.6	0.5	0.2	0.2	0.8	0.6	0.1	0.1
Umbrella, sun umbrellas, walking sticks	0.5	1.6	0.2	0.0	0.0	0.0	0.0	0.0	0.1	0.3	0.0	0.0
Vegetable plaiting materials; vegetables	0.4	0.3	0.4	0.1	0.0	0.0	0.0	0.0	0.5	0.2	0.2	0.0
Vehicles other than railway or tram	4184.5	6890.3	48.4	67.1	15.7	20.2	0.4	0.5	1.1	1.1	0.0	0.0
Wadding, felt and nonwovens;	33.3	33.0	1.1	2.3	0.1	0.1	0.0	0.0	0.5	0.4	0.0	0.0
Wood and articles of wood;	156.8	285.7	16.2	16.7	0.6	0.8	0.1	0.1	0.5	0.6	0.0	0.0
Wool, fine or coarse animal hair;	5.7	10.9	197.0	302.2	0.0	0.0	1.5	2.3	0.2	0.2	5.3	7.0
Works of art, collectors' pieces	39.0	64.8	19.0	25.8	0.1	0.2	0.1	0.2	0.6	0.7	0.3	0.5
Zinc and articles thereof	3.4	5.5	0.1	0.1	0.0	0.0	0.0	0.0	0.1	0.1	0.0	0.0
<b>Total</b>	<b>26679.2</b>	<b>34072.1</b>	<b>12992.9</b>	<b>12954.6</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>0.7</b>	<b>0.7</b>	<b>0.3</b>	<b>0.3</b>

Source: UN Comtrade; own calculations

Table III.1.2: EU's services trade with Australia by EBOPS 2010 sector (2010, 2017, values and % shares)

	Value (€ mln)				Share of total trade (%)				Share of total EU trade (%)			
	Export		Import		Export		Import		Export		Import	
	2010	2017	2010	2017	2010	2017	2010	2017	2010	2017	2010	2017
Manufacturing services on physical inputs owned by others	231.1	39.3	50.8	30.8	1.6	0.2	0.7	0.3	0.6	0.1	0.4	0.1
Maintenance and repair services n.i.e.	140.1	369.9	48.9	157.9	1.0	1.6	0.7	1.7	1.2	1.2	0.7	0.6
Transport	3558.2	5334.6	1654.7	1703.1	24.7	22.8	22.2	17.9	1.3	1.5	0.7	0.5
Travel	3166.4	5910.7	2553.8	3420.5	21.9	25.2	34.2	36.0	1.2	1.5	1.0	1.0
Construction	273.2	148.4	182.3	96.5	1.9	0.6	2.4	1.0	1.4	0.5	1.2	0.5
Insurance and pension services	1196.1	334.9	147.6	89.6	8.3	1.4	2.0	0.9	2.9	0.6	0.5	0.2
Financial services	1112.5	1390.6	250.5	678.4	7.7	5.9	3.4	7.1	0.8	0.7	0.4	0.6
Charges for the use of intellectual property n.i.e	490.2	1141.0	246.7	234.5	3.4	4.9	3.3	2.5	0.9	0.8	0.3	0.1
Telecommunications, computer, and information services	1807.4	4567.7	496.5	543.9	12.5	19.5	6.7	5.7	1.3	1.8	0.5	0.4
Other business services	2281.5	3229.8	1618.9	2446.2	15.8	13.8	21.7	25.8	0.8	0.6	0.5	0.5
Personal, cultural, and recreational services	65.0	146.0	149.5	45.3	0.5	0.6	2.0	0.5	0.4	0.6	0.8	0.2
Government goods and services n.i.e.	102.9	39.9	55.8	46.2	0.7	0.2	0.7	0.5	0.7	0.2	0.3	0.2
<b>SERVICES</b>	<b>14430</b>	<b>23443</b>	<b>7461</b>	<b>9499</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>100</b>	<b>1.1</b>	<b>1.1</b>	<b>0.7</b>	<b>0.5</b>

Source: OECD Stat; own calculations

Table III.1.3: EU's FDI flows and stocks in and from Australia (2017, values and % shares)

	Value (€ mln)				Shares of total FDI (%)			
	Flows		Stocks		Flows		Stocks	
	Inward	Outward	Inward	Outward	Inward	Outward	Inward	Outward
Australia	10255.7	2307.9	130279.6	81307.9	25	53.4	22.2	19.9

Source: OECD Stat; own calculations

Table III.1.4: Tariffs in EU-Australia trade by HS Chapter (2016, % simple average tariffs)

Product	Product Name	Aus tariffs on EU imports			EU tariffs on Aus imports		
		AHS	BND	MFN	AHS	BND	MFN
01	LIVE ANIMALS	0.00	1.00	0.00	1.21	2.25	1.21
02	MEAT AND EDIBLE MEAT OFFAL	0.00	0.00	0.00	5.96	5.41	5.96
03	FISH AND CRUSTACEANS, MOLLUSCS AND OTHER AQUATIC I	0.00	0.00	0.00	11.45	12.78	11.45
04	DAIRY PRODUCE; BIRDS' EGGS; NATURAL HONEY; EDIBLE	0.07	0.73	0.18	10.90	10.10	10.90
05	PRODUCTS OF ANIMAL ORIGIN, NOT ELSEWHERE SPECIFIED	0.77	1.56	0.28	0.09	0.11	0.09
06	LIVE TREES AND OTHER PLANTS; BULBS, ROOTS AND THE	0.00	0.56	0.00	6.64	6.11	6.64
07	EDIBLE VEGETABLES AND CERTAIN ROOTS AND TUBERS	3.03	5.46	2.31	6.16	6.01	6.16
08	EDIBLE FRUIT AND NUTS; PEEL OF CITRUS FRUIT OR MEL	1.41	2.47	1.34	6.60	6.58	6.60
09	COFFEE, TEA, MATÉ AND SPICES	0.00	0.06	0.00	3.12	3.12	3.12
10	CEREALS	0.00	0.71	0.00	1.20	7.68	1.20
11	PRODUCTS OF THE MILLING INDUSTRY; MALT; STARCHES;	0.90	3.68	0.80	8.82	9.60	8.82
12	OIL SEEDS AND OLEAGINOUS FRUITS; MISCELLANEOUS GRA	0.48	1.92	0.54	1.58	1.62	1.58
13	LAC; GUMS, RESINS AND OTHER VEGETABLE SAPS AND EXT	0.68	2.67	0.83	2.42	2.42	2.42
14	VEGETABLE PLAITING MATERIALS; VEGETABLE PRODUCTS N	0.00	0.75	0.00	0.00	0.00	0.00
15	ANIMAL OR VEGETABLE FATS AND OILS AND THEIR CLEAVA	1.82	3.89	2.05	5.65	5.45	5.65
16	PREPARATIONS OF MEAT, OF FISH OR OF CRUSTACEANS, M	1.21	4.70	1.21	13.78	14.10	13.78
17	SUGARS AND SUGAR CONFECTIONERY	2.68	7.83	1.91	13.10	13.10	13.10
18	COCOA AND COCOA PREPARATIONS	3.75	8.50	2.50	6.66	6.66	6.66
19	PREPARATIONS OF CEREALS, FLOUR, STARCH OR MILK; PA	4.37	6.61	4.06	10.65	10.65	10.65
20	PREPARATIONS OF VEGETABLES, FRUIT, NUTS OR OTHER P	4.30	8.91	4.37	17.79	16.86	17.79
21	MISCELLANEOUS EDIBLE PREPARATIONS	1.20	3.28	1.09	9.61	9.37	9.61
22	BEVERAGES, SPIRITS AND VINEGAR	3.69	8.49	3.97	3.94	3.94	3.94
23	RESIDUES AND WASTE FROM THE FOOD INDUSTRIES; PREPA	0.00	1.00	0.00	2.25	2.55	2.25
24	TOBACCO AND MANUFACTURED TOBACCO SUBSTITUTES	0.00	11.60	0.00	40.95	40.95	40.95
25	SALT; SULPHUR; EARTHS AND STONE; PLASTERING MATERI	0.85	2.96	0.83	0.25	0.24	0.25
26	ORES, SLAG AND ASH	0.00	0.70	0.00	0.00	0.00	0.00
27	MINERAL FUELS, MINERAL OILS AND PRODUCTS OF THEIR	0.35	1.50	0.29	0.60	1.04	0.60



Product	Product Name	Aus tariffs on EU imports			EU tariffs on Aus imports		
		AHS	BND	MFN	AHS	BND	MFN
28	INORGANIC CHEMICALS; ORGANIC OR INORGANIC COMPOUND	0.45	9.63	0.48	4.61	4.56	4.61
29	ORGANIC CHEMICALS	0.68	8.59	0.71	4.51	4.11	4.51
30	PHARMACEUTICAL PRODUCTS	1.31	2.30	1.21	0.00	0.67	0.00
31	FERTILISERS	0.00	9.00	0.00	4.43	4.33	4.43
32	TANNING OR DYEING EXTRACTS; TANNINS AND THEIR DERI	4.22	9.52	3.63	5.71	5.81	5.71
33	ESSENTIAL OILS AND RESINOIDS; PERFUMERY, COSMETIC	3.95	8.70	3.31	2.41	2.40	2.41
34	SOAP, ORGANIC SURFACE-ACTIVE AGENTS, WASHING PREPA	4.15	10.00	3.91	1.90	1.87	1.90
35	ALBUMINOIDAL SUBSTANCES; MODIFIED STARCHES; GLUES;	2.28	5.79	1.25	5.70	5.46	5.70
36	EXPLOSIVES; PYROTECHNIC PRODUCTS; MATCHES; PYROPHO	3.06	10.00	3.13	6.42	6.42	6.42
37	PHOTOGRAPHIC OR CINEMATOGRAPHIC GOODS	3.86	8.10	3.33	4.60	5.50	4.60
38	MISCELLANEOUS CHEMICAL PRODUCTS	2.40	9.38	2.16	5.33	5.09	5.33
39	PLASTICS AND ARTICLES THEREOF	4.83	10.24	4.64	6.12	5.72	6.12
40	RUBBER AND ARTICLES THEREOF	4.63	15.14	4.42	3.22	3.20	3.22
41	RAW HIDES AND SKINS (OTHER THAN FURSKINS) AND LEAT	4.85	13.35	4.55	2.66	2.64	2.66
42	ARTICLES OF LEATHER; SADDLERY AND HARNESS; TRAVEL	4.29	15.37	3.63	4.38	4.57	4.38
43	FURSKINS AND ARTIFICIAL FUR; MANUFACTURES THEREOF	4.56	12.94	4.38	2.02	2.02	2.02
44	WOOD AND ARTICLES OF WOOD; WOOD CHARCOAL	4.29	4.34	3.83	2.06	1.84	2.06
45	CORK AND ARTICLES OF CORK	2.93	4.83	1.67	4.31	4.31	4.31
46	MANUFACTURES OF STRAW, OF ESPARTO OR OF OTHER PLAI	0.00	0.33	0.00	3.30	3.11	3.30
47	PULP OF WOOD OR OF OTHER FIBROUS CELLULOSIC MATERI	0.00	0.00	0.00	0.00	0.00	0.00
48	PAPER AND PAPERBOARD; ARTICLES OF PAPER PULP, OF P	4.30	9.26	4.11	0.00	0.00	0.00
49	PRINTED BOOKS, NEWSPAPERS, PICTURES AND OTHER PROD	2.70	4.32	1.97	0.00	0.00	0.00
50	SILK	0.88	16.14	0.63	5.23	5.23	5.23
51	WOOL, FINE OR COARSE ANIMAL HAIR; HORSEHAIR YARN A	4.59	12.80	3.80	3.39	3.39	3.39
52	COTTON	4.98	28.44	4.94	6.84	6.84	6.84
53	OTHER VEGETABLE TEXTILE FIBRES; PAPER YARN AND WOV	0.45	2.60	0.77	4.80	4.80	4.80
54	MAN-MADE FILAMENTS; STRIP AND THE LIKE OF MAN-MADE	4.75	18.12	4.67	6.78	6.78	6.78

Product	Product Name	Aus tariffs on EU imports			EU tariffs on Aus imports		
		AHS	BND	MFN	AHS	BND	MFN
55	MAN-MADE STAPLE FIBRES	4.45	19.94	4.18	6.97	6.97	6.97
56	WADDING, FELT AND NONWOVENS; SPECIAL YARNS; TWINE,	4.02	6.75	3.75	6.00	5.98	6.00
57	CARPETS AND OTHER TEXTILE FLOOR COVERINGS	3.18	14.07	3.00	7.45	7.45	7.45
58	SPECIAL WOVEN FABRICS; TUFTED TEXTILE FABRICS; LAC	3.94	12.36	3.54	7.17	7.18	7.17
59	IMPREGNATED, COATED, COVERED OR LAMINATED TEXTILE	4.45	12.71	4.29	6.03	6.08	6.03
60	KNITTED OR CROCHETED FABRICS	5.00	24.15	5.00	7.86	7.86	7.86
61	ARTICLES OF APPAREL AND CLOTHING ACCESSORIES, KNIT	4.68	41.55	4.61	11.67	11.68	11.67
62	ARTICLES OF APPAREL AND CLOTHING ACCESSORIES, NOT	4.64	41.31	4.57	11.29	11.29	11.29
63	OTHER MADE-UP TEXTILE ARTICLES; SETS; WORN CLOTHIN	4.27	23.44	3.99	10.41	10.33	10.41
64	FOOTWEAR, GAITERS AND THE LIKE; PARTS OF SUCH ARTI	3.74	19.64	3.63	11.39	11.39	11.39
65	HEADGEAR AND PARTS THEREOF	1.59	23.33	1.79	2.63	2.33	2.63
66	UMBRELLAS, SUN UMBRELLAS, WALKING STICKS, SEAT-STI	2.24	12.67	1.67	4.13	4.13	4.13
67	PREPARED FEATHERS AND DOWN AND ARTICLES MADE OF FE	0.00	2.38	0.00	2.83	2.83	2.83
68	ARTICLES OF STONE, PLASTER, CEMENT, ASBESTOS, MICA	4.33	10.21	3.93	1.12	1.09	1.12
69	CERAMIC PRODUCTS	4.64	9.35	4.31	5.17	5.19	5.17
70	GLASS AND GLASSWARE	3.31	11.12	2.83	5.50	5.48	5.50
71	NATURAL OR CULTURED PEARLS, PRECIOUS OR SEMI-PRECI	2.75	5.68	1.17	0.80	0.81	0.80
72	IRON AND STEEL	4.35	5.76	4.09	0.05	0.05	0.05
73	ARTICLES OF IRON OR STEEL	4.65	11.06	4.39	1.76	1.77	1.76
74	COPPER AND ARTICLES THEREOF	4.29	3.94	3.83	3.26	3.28	3.26
75	NICKEL AND ARTICLES THEREOF	0.45	0.33	0.33	0.79	0.79	0.79
76	ALUMINIUM AND ARTICLES THEREOF	4.72	4.84	4.38	6.05	6.08	6.05
78	LEAD AND ARTICLES THEREOF	1.15	0.50	0.50	1.25	1.81	1.25
79	ZINC AND ARTICLES THEREOF	1.07	0.31	0.31	2.50	2.50	2.50
80	TIN AND ARTICLES THEREOF	0.00	0.00	0.00	0.00	0.00	0.00
81	OTHER BASE METALS; CERMETS; ARTICLES THEREOF	0.00	0.00	0.00	3.44	3.28	3.44
82	TOOLS, IMPLEMENTS, CUTLERY, SPOONS AND FORKS, OF B	4.38	13.88	4.18	3.12	3.12	3.12
83	MISCELLANEOUS ARTICLES OF BASE METAL	4.85	16.47	4.72	2.23	2.21	2.23

Product	Product Name	Aus tariffs on EU imports			EU tariffs on Aus imports		
		AHS	BND	MFN	AHS	BND	MFN
84	NUCLEAR REACTORS, BOILERS, MACHINERY AND MECHANICA	3.32	8.09	2.88	1.62	1.65	1.62
85	ELECTRICAL MACHINERY AND EQUIPMENT AND PARTS THERE	2.93	8.65	2.77	2.28	2.46	2.28
86	RAILWAY OR TRAMWAY LOCOMOTIVES, ROLLING STOCK AND	4.39	15.08	4.62	1.79	1.71	1.79
87	VEHICLES OTHER THAN RAILWAY OR TRAMWAY ROLLING STO	3.33	12.92	3.35	5.55	5.48	5.55
88	AIRCRAFT, SPACECRAFT, AND PARTS THEREOF	0.00	2.65	0.00	1.64	1.96	1.64
89	SHIPS, BOATS AND FLOATING STRUCTURES	3.23	15.00	3.25	1.35	1.40	1.35
90	OPTICAL, PHOTOGRAPHIC, CINEMATOGRAPHIC, MEASURING,	0.71	2.19	0.71	1.50	1.89	1.50
91	CLOCKS AND WATCHES AND PARTS THEREOF	0.68	3.13	0.50	4.05	4.05	4.05
92	MUSICAL INSTRUMENTS; PARTS AND ACCESSORIES OF SUCH	1.52	5.22	1.18	3.15	3.15	3.15
93	ARMS AND AMMUNITION; PARTS AND ACCESSORIES THEREOF	1.67	4.06	1.53	2.49	2.50	2.49
94	FURNITURE; BEDDING, MATTRESSES, MATTRESS SUPPORTS,	4.36	14.08	4.25	1.92	1.62	1.92
95	TOYS, GAMES AND SPORTS REQUISITES; PARTS AND ACCES	3.94	14.76	3.82	2.31	2.30	2.31
96	MISCELLANEOUS MANUFACTURED ARTICLES	3.26	13.11	2.89	3.23	3.36	3.23
97	WORKS OF ART, COLLECTORS' PIECES AND ANTIQUES	0.00	0.86	0.00	0.00	0.00	0.00

Source: UNCTAD Trains

Table III.1.5: Services trade restrictions in Australia and the EU (2018)

	Australia						EU					
Sector	Indicator STRI	Restrictions on foreign entry	Restrictions movement of people	Other discr. measures	Barriers to competition	Regulatory transparency	Indicator STRI	Restrictions on foreign entry	Restrictions movement of people	Other discr. measures	Barriers to competition	Regulatory transparency
Logistics cargo-handling	0.22	0.05	0.02	0.00	0.07	0.08	0.19	0.04	0.03	0.01	0.05	0.05
Logistics storage and warehouse	0.17	0.05	0.02	0.00	0.01	0.08	0.18	0.05	0.04	0.01	0.03	0.05
Logistics freight forwarding	0.17	0.06	0.02	0.00	0.00	0.09	0.17	0.05	0.04	0.01	0.01	0.06
Logistics customs brokerage	0.17	0.06	0.02	0.00	0.00	0.09	0.18	0.06	0.04	0.01	0.01	0.06
Accounting	0.18	0.08	0.08	0.00	0.00	0.03	0.26	0.10	0.12	0.01	0.01	0.03
Architecture	0.15	0.03	0.08	0.00	0.00	0.04	0.26	0.04	0.16	0.01	0.01	0.04
Engineering	0.13	0.05	0.05	0.00	0.00	0.04	0.25	0.05	0.14	0.01	0.01	0.04
Legal	0.13	0.06	0.04	0.00	0.01	0.02	0.39	0.17	0.16	0.02	0.01	0.03
Motion pictures	0.15	0.06	0.03	0.02	0.00	0.04	0.18	0.05	0.05	0.03	0.01	0.04
Broadcasting	0.19	0.11	0.02	0.02	0.02	0.02	0.22	0.12	0.03	0.03	0.03	0.02
Sound recording	0.14	0.04	0.03	0.02	0.00	0.06	0.19	0.03	0.05	0.03	0.02	0.05
Telecom	0.17	0.06	0.01	0.01	0.05	0.03	0.15	0.04	0.02	0.02	0.03	0.03
Air transport	0.30	0.14	0.01	0.00	0.13	0.03	0.41	0.23	0.02	0.02	0.12	0.02
Maritime transport	0.18	0.10	0.04	0.01	0.01	0.03	0.22	0.11	0.06	0.02	0.02	0.02
Road freight transport	0.13	0.08	0.04	0.00	0.00	0.01	0.18	0.07	0.05	0.02	0.03	0.01
Rail freight transport	0.14	0.06	0.03	0.00	0.01	0.05	0.21	0.06	0.04	0.01	0.06	0.03
Courier	0.37	0.15	0.04	0.01	0.10	0.08	0.18	0.05	0.03	0.01	0.04	0.04
Distribution	0.14	0.05	0.01	0.00	0.01	0.06	0.16	0.05	0.02	0.02	0.04	0.04
Commercial banking	0.17	0.10	0.02	0.00	0.01	0.05	0.18	0.07	0.03	0.01	0.03	0.04
Insurance	0.19	0.10	0.03	0.00	0.01	0.05	0.17	0.08	0.04	0.01	0.01	0.03
Computer	0.16	0.06	0.05	0.00	0.00	0.06	0.21	0.04	0.08	0.02	0.01	0.06
Construction	0.19	0.07	0.03	0.00	0.01	0.08	0.21	0.04	0.07	0.03	0.01	0.05
<b>Average STRI</b>	<b>0.18</b>	<b>0.07</b>	<b>0.03</b>	<b>0.00</b>	<b>0.02</b>	<b>0.05</b>	<b>0.22</b>	<b>0.07</b>	<b>0.06</b>	<b>0.02</b>	<b>0.03</b>	<b>0.04</b>

Source: OECD STRI database; the average values for the EU are based on own calculations

Table III.1.6: EU's trade in agricultural products with Australia (2017, values and % shares)

HS Code	Product description	Value (€ mln)		Share in total trade (%)	
		Export 2017	Import 2017	Export 2017	Import 2017
1	Live animals; animal products	51.2	3.9	0.2	0.0
2	Meat and edible meat offal	255.0	277.5	0.7	2.1
3	Fish and crustaceans, molluscs and	84.9	15.3	0.2	0.1
4	Dairy produce; birds' eggs; natural	248.5	3.8	0.7	0.0
5	Products of animal origin, not else	4.5	13.9	0.0	0.1
6	Live trees and other plants; bulbs,	13.3	4.3	0.0	0.0
7	Edible vegetables and certain roots	29.4	34.8	0.1	0.3
8	Edible fruit and nuts; peel of citrus	21.8	177.2	0.1	1.4
9	Coffee, tea, and spices	101.5	2.6	0.3	0.0
10	Cereals	7.9	75.4	0.0	0.6
11	Products of the milling industry; m	39.1	3.5	0.1	0.0
12	Oil seeds and oleaginous fruits; mi	70.1	1083.4	0.2	8.4
13	Lac; gums, resins and other vegetables	24.4	10.7	0.1	0.1
14	Vegetable plaiting materials; vegetables	0.2	0.1	0.0	0.0
15	Animal or vegetable fats and oils a	121.1	14.3	0.4	0.1
16	Preparations of meat, of fish or of	37.2	0.7	0.1	0.0
17	Sugars and sugar confectionery	60.7	5.5	0.2	0.0
18	Cocoa and cocoa preparations	228.2	1.7	0.7	0.0
19	Preparations of cereals, flour	349.6	6.0	1.0	0.0
20	Preparations of vegetables, fruit,	251.3	5.7	0.7	0.0
21	Miscellaneous edible preparations	394.1	11.5	1.2	0.1
22	Beverages, spirits and vinegar	704.9	515.3	2.1	4.0
23	Residues and waste from the food in	112.5	5.9	0.3	0.0
24	Tobacco and manufactured tobacco	87.0	0.0	0.3	0.0
<b>1-24</b>	<b>Agricultural products</b>	<b>3298.5</b>	<b>2273.1</b>	<b>9.7</b>	<b>17.5</b>
<b>1-99</b>	<b>Total goods</b>	<b>34072.5</b>	<b>12959.7</b>	<b>100</b>	<b>100</b>

Source: UN Comtrade; own calculations

Table III.1.7a: OCTs trade with the EU (2017, values and % shares for Australian and EU OCTs)

Product description	AUS OCTs				EU OCTs			
	Import €'000	(%)	Export € '000	(%)	Import €'000	(%)	Export €'000	(%)
Live animals; animal products					544.9	0.0	22.4	0.0
Meat and edible meat offal					49764.5	0.9	2985.7	0.2
Fish and crustaceans, molluscs and					8823.9	0.2	559336.6	31.4
Dairy produce; birds' eggs; natural			0.3	0.0	81352.8	1.5	306.6	0.0
Products of animal origin, not else					414.9	0.0	1446.5	0.1
Live trees and other plants; bulbs,					1463.1	0.0	27.9	0.0
Edible vegetables and certain roots			33.4	1.9	14863.1	0.3	124.6	0.0
Edible fruit and nuts; peel of citrus					10603.3	0.2	136.1	0.0
Coffee, tea and spices					29917.8	0.5	3921.8	0.2
Cereals			3.9	0.2	1058.8	0.0	84.9	0.0
Products of the milling industry; m					12629.8	0.2	11.9	0.0
Oil seeds and oleaginous fruits; mi			195.4	11.0	1753.5	0.0	422.2	0.0
Lac; gums, resins and other vegetables			1.6	0.1	138.2	0.0	8.9	0.0
Vegetable plaiting materials; vegetables			4.3	0.2	52.1	0.0	0.0	0.0
Animal or vegetable fats and oils a			1.7	0.1	14281.5	0.3	8440.8	0.5
Preparations of meat, of fish or of					64868.2	1.2	109953.9	6.2
Sugars and sugar confectionery			0.3	0.0	11941.1	0.2	503.0	0.0
Cocoa and cocoa preparations					20162.1	0.4	135.7	0.0
Preparations of cereals, flour					68999.8	1.3	89.2	0.0
Preparations of vegetables, fruit,			0.8	0.0	36142.6	0.7	619.9	0.0
Miscellaneous edible preparations					113716.6	2.1	684.9	0.0
Beverages, spirits and vinegar	12.0	0.1	0.5	0.0	171105.0	3.1	11409.8	0.6
Residues and waste from the food in			12.7	0.7	18568.5	0.3	2524.5	0.1
Tobacco and manufactured tobacco					19114.2	0.4	6.8	0.0
Salt; sulphur; earths and stone; pl	11.1	0.1	0.1	0.0	7111.1	0.1	4243.2	0.2
Ores, slag and ash					702.0	0.0	532.1	0.0

Product description	AUS OCTs				EU OCTs			
	Import €'000	(%)	Export € '000	(%)	Import €'000	(%)	Export €'000	(%)
Mineral fuels, mineral oils and pro	18909.6	95.3	3.1	0.2	158297.9	2.9	22088.0	1.2
Inorganic chemicals			26.0	1.5	3601.2	0.1	18.5	0.0
Organic chemicals	39.1	0.2	21.1	1.2	2214.4	0.0	2808.2	0.2
Pharmaceutical products	19.7	0.1			213025.1	3.9	159.8	0.0
Fertilisers					3670.2	0.1	1242.9	0.1
Tanning or dyeing extracts; tannins					30949.8	0.6	32.7	0.0
Essential oils and resinoids; perfumes	34.1	0.2	0.9	0.1	54564.6	1.0	9000.8	0.5
Soap, organic surface-active agents	0.8	0.0	5.1	0.3	30079.2	0.6	171.3	0.0
Albuminoidal substances; modified s					3718.7	0.1	6.3	0.0
Explosives; pyrotechnic products; m					1835.9	0.0	0.2	0.0
Photographic or cinematographic goo			0.6	0.0	1486.5	0.0	1.6	0.0
Miscellaneous chemical products	9.1	0.0	3.5	0.2	38409.1	0.7	275.5	0.0
Plastics and articles thereof	73.3	0.4	126.2	7.1	93857.8	1.7	1778.0	0.1
Rubber and articles thereof	1.9	0.0	3.9	0.2	18951.7	0.3	838.3	0.0
Raw hides and skins (other than furs)			108.8	6.1	73.9	0.0	206.2	0.0
Articles of leather; saddlery and h	1.9	0.0	35.3	2.0	14444.6	0.3	145.4	0.0
Furskins and artificial fur; manufactured skins					446.2	0.0	342.7	0.0
Wood and articles of wood; wood cha			207.2	11.7	34487.3	0.6	220.6	0.0
Cork and articles of cork					51.4	0.0		
Manufactures of straw, of esparto o			2.3	0.1	245.3	0.0	0.6	0.0
Pulp of wood					41.6	0.0	9.4	0.0
Paper and paperboard; articles of p			45.1	2.5	45073.9	0.8	211.6	0.0
Printed books, newspapers, pictures	0.0	0.0			24302.2	0.4	138.9	0.0
Silk					11.6	0.0		
Wool, fine or coarse animal hair; h					99.1	0.0	10099.2	0.6
Cotton					787.3	0.0	17.0	0.0
Other vegetable textile fibers; pap					73.2	0.0	11.1	0.0

Product description	AUS OCTs				EU OCTs			
	Import €'000	(%)	Export € '000	(%)	Import €'000	(%)	Export €'000	(%)
Man-made filaments; strip and the l					553.7	0.0	26.6	0.0
Man-made staple fibers					620.8	0.0	15.3	0.0
Wadding, felt and nonwovens					6031.4	0.1	178.8	0.0
Carpets and other textile floor covers			0.4	0.0	1362.3	0.0	15.1	0.0
Special woven fabrics; tufted textiles			1.4	0.1	519.0	0.0	0.8	0.0
Impregnated, coated, covered or lam			6.6	0.4	1952.6	0.0	35.1	0.0
Knitted or crocheted fabrics					754.6	0.0	7.6	0.0
Articles of apparel and clothing ac	5.8	0.0	5.5	0.3	30710.8	0.6	417.4	0.0
Articles of apparel and clothing ac	6.5	0.0	64.9	3.7	31264.0	0.6	714.0	0.0
Other made up textile articles; set	46.8	0.2	2.0	0.1	15030.3	0.3	138.5	0.0
Footwear, gaiters and the like; par	73.5	0.4	0.2	0.0	15416.3	0.3	6262.5	0.4
Headgear and parts thereof			6.7	0.4	1683.8	0.0	126.1	0.0
Umbrella, sun umbrellas, walking-sticks			0.3	0.0	339.2	0.0	4.7	0.0
Prepared feathers and down and artificial			0.3	0.0	444.9	0.0	1.7	0.0
Articles of stone, plaster, cement			22.5	1.3	31192.3	0.6	113.7	0.0
Ceramic products			37.1	2.1	26142.4	0.5	64.0	0.0
Glass and glassware			49.2	2.8	15434.1	0.3	97.1	0.0
Natural or cultured pearls, precious stones			14.3	0.8	13913.4	0.3	53479.5	3.0
Iron and steel			0.7	0.0	27660.6	0.5	84185.2	4.7
Articles of iron or steel	122.1	0.6	43.0	2.4	128337.2	2.4	2504.2	0.1
Copper and articles thereof					5603.0	0.1	8117.5	0.5
Nickel and articles thereof					99.8	0.0	509.1	0.0
Aluminum and articles thereof			3.3	0.2	34432.1	0.6	1126.0	0.1
Lead and articles thereof					104.7	0.0	262.0	0.0
Zinc and articles thereof					202.5	0.0	7.5	0.0
Tin and articles thereof					54.9	0.0	0.4	0.0
Other base metals; cermets; article					624.5	0.0	8213.2	0.5



Product description	AUS OCTs				EU OCTs			
	Import €'000	(%)	Export € '000	(%)	Import €'000	(%)	Export €'000	(%)
Tools, implements, cutlery, spoons	6.3	0.0	43.5	2.5	26725.9	0.5	794.7	0.0
Miscellaneous articles of base meta			39.7	2.2	20406.1	0.4	96.5	0.0
Nuclear reactors, boilers, machinery	139.3	0.7	250.3	14.1	417896.8	7.7	15840.3	0.9
Electrical machinery and equipment	103.7	0.5	132.8	7.5	272896.0	5.0	15724.3	0.9
Railway or tramway locomotives					1544.6	0.0	153.7	0.0
Vehicles other than railway or tram	29.4	0.1	6.3	0.4	231229.1	4.2	2193.6	0.1
Aircraft, spacecraft, and parts the	14.5	0.1	5.6	0.3	119986.3	2.2	123309.3	6.9
Ships, boats and floating structure					1976222.2	36.2	586694.3	33.0
Optical, photographic, cinematographic	27.3	0.1	35.1	2.0	123681.1	2.3	7049.0	0.4
Clocks and watches and parts thereof			0.2	0.0	3956.0	0.1	101.5	0.0
Musical instruments; parts and ace					1032.2	0.0	89.8	0.0
Arms and ammunition; parts					2717.4	0.0	72.2	0.0
Furniture; bedding, mattresses, mat	16.1	0.1	137.2	7.7	104831.7	1.9	1466.8	0.1
Toys, games and sports requisites;			10.0	0.6	36460.6	0.7	1655.5	0.1
Miscellaneous manufactured articles	3.2	0.0	7.9	0.4	8941.8	0.2	75.8	0.0
Works of art, collectors' pieces an					113034.8	2.1	7212.9	0.4
Commodities not specified according	126.6	0.6	0.1	0.0	68321.7	1.3	91874.1	5.2
<b>Total</b>	<b>19833</b>	<b>100</b>	<b>1771</b>	<b>100</b>	<b>5455262</b>	<b>100</b>	<b>1778832</b>	<b>100</b>

Source: UN Comtrade; authors calculations

Table III.1.7b: OCTs trade with the EU (2017, values and % shares for LDCs and NZ OCTs)

Product description	LDCs				NZ OCTs			
	Import €'000	(%)	Export €'000	(%)	Import €'000	(%)	Export €'000	(%)
Live animals; animal products	39327.3	0.1	520.3	0.0	29.2	0.1	0.5	0.0
Meat and edible meat offal	414698.3	1.4	580.6	0.0	38.4	0.2	1.3	0.0
Fish and crustaceans, molluscs and	70474.1	0.2	1037533.7	2.4			7.3	0.0
Dairy produce; birds' eggs; natural	502963.0	1.7	2484.9	0.0				
Products of animal origin, not else	11694.1	0.0	3088.3	0.0			0.1	0.0
Live trees and other plants; bulbs,	4094.9	0.0	265706.4	0.6			0.0	0.0
Edible vegetables and certain roots	167039.1	0.6	184515.1	0.4			22.7	0.1
Edible fruit and nuts; peel of citrus	29599.6	0.1	182241.1	0.4			40.6	0.3
Coffee, tea, and spices	21631.6	0.1	1207372.5	2.8				
Cereals	446924.4	1.5	285632.7	0.7				
Products of the milling industry; m	319593.1	1.1	5245.5	0.0				
Oil seeds and oleaginous fruits; mi	37285.0	0.1	73056.1	0.2	0.5	0.0		
Lac; gums, resins and other vegetables	19271.8	0.1	66686.3	0.2				
Vegetable plaiting materials; vegetables	306.5	0.0	2543.0	0.0				
Animal or vegetable fats and oils a	216193.4	0.7	93152.0	0.2	4.8	0.0		
Preparations of meat, of fish or of	97079.5	0.3	328571.7	0.8			7.6	0.0
Sugars and sugar confectionery	139415.9	0.5	102887.3	0.2			83.8	0.5
Cocoa and cocoa preparations	34124.8	0.1	185252.7	0.4			427.1	2.7
Preparations of cereals, flour	742873.6	2.6	14444.8	0.0	3.6	0.0	12.6	0.1
Preparations of vegetables, fruit,	122790.5	0.4	40536.8	0.1	221.0	1.0	1016.3	6.5
Miscellaneous edible preparations	405809.1	1.4	4451.5	0.0	4.7	0.0	1.8	0.0
Beverages, spirits and vinegar	458921.7	1.6	5041.4	0.0	253.9	1.1	13.8	0.1
Residues and waste from the food in	183413.1	0.6	17345.5	0.0				
Tobacco and manufactured tobacco supplements	74268.1	0.3	737909.7	1.7	1.4	0.0		
Salt; sulphur; earths and stone; pl	117557.3	0.4	78043.5	0.2	0.8	0.0		

Product description	LDCs				NZ OCTs			
	Import €'000	(%)	Export €'000	(%)	Import €'000	(%)	Export €'000	(%)
Ores, slag and ash	1904.5	0.0	939801.6	2.2				
Mineral fuels, mineral oils and pro	3514283.6	12.2	3442585.4	7.9	1780.0	7.7	0.2	0.0
Inorganic chemicals	96517.3	0.3	234814.3	0.5			171.4	1.1
Organic chemicals	163122.7	0.6	75283.2	0.2				
Pharmaceutical products	1916355.4	6.6	12261.9	0.0	544.9	2.4	263.8	1.7
Fertilisers	139355.6	0.5	4592.0	0.0				
Tanning or dyeing extracts; tannins	167465.1	0.6	2140.6	0.0	53.3	0.2	84.9	0.5
Essential oils and resinoids; perfumes	329712.3	1.1	63780.1	0.1	29.4	0.1	308.9	2.0
Soap, organic surface-active agents	144761.8	0.5	382.0	0.0	0.3	0.0	4.0	0.0
Albuminoidal substances; modified	51122.5	0.2	1020.2	0.0	134.8	0.6		
Explosives; pyrotechnic products	24201.0	0.1	91.6	0.0				
Photographic or cinematographic goods	22645.0	0.1	79.7	0.0				
Miscellaneous chemical products	538492.1	1.9	1157.9	0.0	6.2	0.0		
Plastics and articles thereof	592009.1	2.0	48907.0	0.1	78.6	0.3	174.2	1.1
Rubber and articles thereof	204642.0	0.7	57633.5	0.1	6.6	0.0	89.3	0.6
Raw hides and skins(other than furs	49254.8	0.2	69844.6	0.2				
Articles of leather; saddlery	23097.2	0.1	222840.8	0.5	2.2	0.0	71.0	0.5
Furskins and artificial fur; manufactured skin	206564.5	0.7	4288.6	0.0			18.2	0.1
Wood and articles of wood	89960.2	0.3	97121.6	0.2	0.0	0.0	2.9	0.0
Cork and articles of cork	862.6	0.0	2.1	0.0				
Manufactures of straw, of esparto o	345.9	0.0	16739.8	0.0				
Pulp of wood	11748.5	0.0	78.9	0.0				
Paper and paperboard; articles of p	342473.9	1.2	5642.6	0.0			1.3	0.0
Printed books, newspapers, pictures	169724.2	0.6	3692.7	0.0	4.2	0.0	5.5	0.0
Silk	16081.7	0.1	64.4	0.0				
Wool, fine or coarse animal hair; h	37577.8	0.1	3399.1	0.0	0.2	0.0		
Cotton	294573.5	1.0	47073.4	0.1			217.2	1.4

Product description	LDCs				NZ OCTs			
	Import €'000	(%)	Export €'000	(%)	Import €'000	(%)	Export €'000	(%)
Other vegetable textile fibers; pap	4258.9	0.0	45695.3	0.1				
Man-made filaments; strip and the l	12535.0	0.0	617.3	0.0			3.0	0.0
Man-made staple fibers	52599.3	0.2	835.4	0.0			1.8	0.0
Wadding, felt and nonwovens	28523.2	0.1	13604.6	0.0	5.2	0.0	0.3	0.0
Carpets and other textile floor covers	11553.2	0.0	38342.6	0.1			1.0	0.0
Special woven fabrics; tufted textiles	18545.1	0.1	5276.7	0.0	0.2	0.0	4.2	0.0
Impregnated, coated, covered or lam	27645.2	0.1	183.8	0.0			11.0	0.1
Knitted or crocheted fabrics	18224.8	0.1	355.3	0.0			1.7	0.0
Articles of apparel and clothing	34732.1	0.1	15457258.4	35.6	5.4	0.0	1369.0	8.7
Articles of apparel and clothing	79099.4	0.3	11070032.4	25.5	0.8	0.0	1417.3	9.0
Other made up textile articles;	302404.5	1.0	461399.0	1.1			428.6	2.7
Footwear, gaiters and the like;	53406.3	0.2	1531561.1	3.5	1.3	0.0	63.6	0.4
Headgear and parts thereof	5760.2	0.0	72779.9	0.2	10.3	0.0	20.4	0.1
Umbrella, sun umbrellas, walking-sticks	982.3	0.0	6784.0	0.0				
Prepared feathers and down and artificial	2498.6	0.0	15667.7	0.0				
Articles of stone, plaster, cement	61387.2	0.2	2549.0	0.0	5.0	0.0	20.2	0.1
Ceramic products	142584.9	0.5	27621.1	0.1	8.5	0.0	39.4	0.3
Glass and glassware	68743.3	0.2	3782.6	0.0	60.4	0.3	7.8	0.0
Natural or cultured pearls, precious	82886.6	0.3	1106562.6	2.6	23.8	0.1	3246.6	20.7
Iron and steel	305453.3	1.1	28405.8	0.1	73.4	0.3	935.4	6.0
Articles of iron or steel	661504.2	2.3	10530.4	0.0	86.9	0.4	39.8	0.3
Copper and articles thereof	45881.7	0.2	772449.1	1.8	0.9	0.0	2.1	0.0
Nickel and articles thereof	4521.8	0.0	82968.6	0.2				
Aluminum and articles thereof	117882.4	0.4	927405.1	2.1	11.5	0.0	3.4	0.0
Lead and articles thereof	7270.7	0.0	3751.4	0.0				
Zinc and articles thereof	13995.8	0.0	190.1	0.0				
Tin and articles thereof	257.4	0.0	13.2	0.0				

Product description	LDCs				NZ OCTs			
	Import €'000	(%)	Export €'000	(%)	Import €'000	(%)	Export €'000	(%)
Other base metals; cermets; article	827.2	0.0	32172.6	0.1				
Tools, implements, cutlery, spoons	111205.3	0.4	3099.4	0.0	16.1	0.1	8.0	0.1
Miscellaneous articles of base meta	121745.7	0.4	4104.1	0.0	3.6	0.0	1.8	0.0
Nuclear reactors, boilers, machinery	5316738.7	18.4	169210.6	0.4	1949.0	8.4	270.1	1.7
Electrical machinery and equipment	2225759.2	7.7	67544.5	0.2	1058.7	4.6	243.7	1.6
Railway or tramway locomotives	41289.3	0.1	292.7	0.0				
Vehicles other than railway or tram	1682898.2	5.8	390297.7	0.9	9.9	0.0	15.1	0.1
Aircraft, spacecraft, and parts the	1208810.2	4.2	10566.7	0.0	1578.5	6.8	21.5	0.1
Ships, boats and floating structure	443321.9	1.5	426767.7	1.0	13742.0	59.4	4125.3	26.3
Optical, photographic, cinematography	739927.0	2.6	33670.0	0.1	842.7	3.6	258.2	1.6
Clocks and watches and parts thereof	21054.7	0.1	10127.0	0.0			0.8	0.0
Musical instruments; parts	3198.5	0.0	1802.6	0.0			1.0	0.0
Arms and ammunition; parts	32727.8	0.1	2102.2	0.0			12.7	0.1
Furniture; bedding, mattresses, mat	367598.3	1.3	43086.7	0.1	10.9	0.0	26.9	0.2
Toys, games and sports requisites;	34960.9	0.1	53014.7	0.1	21.4	0.1	37.9	0.2
Miscellaneous manufactured articles	41446.8	0.1	4794.5	0.0	0.1	0.0	0.9	0.0
Works of art, collectors' pieces an	3058.8	0.0	4331.2	0.0				
Commodities not specified according	524474.0	1.8	156877.3	0.4	416.2	1.8	8.1	0.1
<b>Total</b>	<b>28912385</b>	<b>100</b>	<b>43380647</b>	<b>100</b>	<b>23142</b>	<b>100</b>	<b>15696</b>	<b>100</b>

Source: UN Comtrade; authors calculations

Table III.1.8a: OCTs trade with the EU (2017, values and percent shares, Australian and EU OCTs)

Product description	AUS OCTs				EU OCTs			
	Import €'000	(%)	Export €'000	(%)	Import €'000	(%)	Export €'000	(%)
Live animals; animal products					94.8	0.0	5.8	0.0
Meat and edible meat offal	959.3	2.5			6844.4	2.3		
Fish and crustaceans, molluscs and	26.3	0.1			6.8	0.0	1944.8	3.3
Dairy produce; birds' eggs; natural	98.0	0.3			3541.5	1.2		
Products of animal origin, not else					334.8	0.1		
Live trees and other plants; bulbs,	1.2	0.0			116.5	0.0		
Edible vegetables and certain roots	79.5	0.2			1091.6	0.4		
Edible fruit and nuts; peel of citrus					3478.0	1.1	4.5	0.0
Coffee, tea and spices	23.3	0.1			136.9	0.0	2.2	0.0
Cereals					7302.7	2.4		
Products of the milling industry;	38.6	0.1			977.3	0.3		
Oil seeds and oleaginous fruits;	29.2	0.1	45.5	3.4	871.7	0.3		
Lac; gums, resins and other vegetables					11.8	0.0		
Vegetable plaiting materials; vegetables								
Animal or vegetable fats and oils a	40.0	0.1			3552.8	1.2		
Preparations of meat, of fish or of	30.1	0.1			1120.0	0.4	430.8	0.7
Sugars and sugar confectionery	1.7	0.0			810.5	0.3		
Cocoa and cocoa preparations	4.2	0.0			912.8	0.3		
Preparations of cereals, flour	3.3	0.0			9336.1	3.1		
Preparations of vegetables, fruit,	5.0	0.0			1208.1	0.4	27.2	0.0
Miscellaneous edible preparations	219.3	0.6			5715.4	1.9		
Beverages, spirits and vinegar	1382.4	3.7			2791.4	0.9	155.4	0.3
Residues and waste from the food in	33.5	0.1			3033.8	1.0		
Tobacco and manufactured tobacco supplements	925.6	2.5	319.3	23.8	2707.5	0.9		
Salt; sulphur; earths and stone	46.7	0.1	646.4	48.3	650.4	0.2	1.5	0.0

Product description	AUS OCTs				EU OCTs			
	Import €'000	(%)	Export €'000	(%)	Import €'000	(%)	Export €'000	(%)
Ores, slag and ash					28.5	0.0	6056.2	10.2
Mineral fuels, mineral oils and products	4916.4	13.1			110523.6	36.5	27246.2	46.0
Inorganic chemicals	40.0	0.1			7708.0	2.5	7041.8	11.9
Organic chemicals	0.6	0.0			301.4	0.1	8.4	0.0
Pharmaceutical products	564.0	1.5			1637.2	0.5		
Fertilisers	14.0	0.0			951.2	0.3	15.5	0.0
Tanning or dyeing extracts; tannins	176.6	0.5			1417.1	0.5		
Essential oils and resinoids; perfume	62.7	0.2			900.5	0.3	12.0	0.0
Soap, organic surface-active agents	155.6	0.4			697.1	0.2	3.6	0.0
Albuminoidal substances; modified s	17.3	0.0			29.1	0.0		
Explosives; pyrotechnic products	13.4	0.0			1149.0	0.4		
Photographic or cinematographic goo					362.3	0.1		
Miscellaneous chemical products	90.6	0.2			3055.3	1.0	118.5	0.2
Plastics and articles thereof	510.2	1.4	78.0	5.8	4360.6	1.4	148.7	0.3
Rubber and articles thereof	268.8	0.7	2.0	0.2	3443.4	1.1	4104.7	6.9
Raw hides and skins(other than furs					9.1	0.0	100.8	0.2
Articles of leather; saddlery	6.2	0.0			576.9	0.2	1.2	0.0
Furskins and artificial fur; manufactured skins	4.7	0.0			774.8	0.3		
Wood and articles of wood	196.9	0.5			877.0	0.3		
Cork and articles of cork								
Manufactures of straw, of esparto	2.7	0.0						
Pulp of wood or of other fibers					16.0	0.0	20.8	0.0
Paper and paperboard	86.6	0.2			1822.7	0.6	151.0	0.3
Printed books, newspapers, pictures	103.8	0.3	2.3	0.2	186.7	0.1	24.5	0.0
Silk					7.9	0.0		
Wool, fine or coarse animal hair								
Cotton	0.0	0.0			148.3	0.0		

Product description	AUS OCTs				EU OCTs			
	Import €'000	(%)	Export €'000	(%)	Import €'000	(%)	Export €'000	(%)
Other vegetable textile fibers; pap					14.2	0.0		
Man-made filaments; strip and the l					54.9	0.0		
Man-made staple fibers	4.2	0.0			4.8	0.0		
Wadding, felt and nonwovens	16.0	0.0			49.3	0.0		
Carpets and other textile floor covers	5.9	0.0			18.9	0.0	29.9	0.1
Special woven fabrics; tufted textiles	6.9	0.0			12.1	0.0		
Impregnated, coated, covered or lam					620.9	0.2		
Knitted or crocheted fabrics					5.2	0.0		
Articles of apparel and clothing	34.3	0.1	12.8	1.0	461.1	0.2	14.7	0.0
Articles of apparel and clothing	65.1	0.2	8.6	0.6	540.7	0.2	12.7	0.0
Other made up textile articles; set	136.1	0.4			215.9	0.1	72.6	0.1
Footwear, gaiters and the like	30.0	0.1			1811.6	0.6	23.7	0.0
Headgear and parts thereof	6.4	0.0			138.0	0.0		
Umbrella, sun umbrellas, walking-sticks	2.6	0.0			0.4	0.0		
Prepared feathers and down and artificial								
Articles of stone, plaster, cement,	287.6	0.8			1486.8	0.5		
Ceramic products	26.8	0.1			243.5	0.1		
Glass and glassware	28.4	0.1			223.9	0.1	1.6	0.0
Natural or cultured pearls, precious	1.8	0.0			1008.5	0.3	848.1	1.4
Iron and steel	323.7	0.9			413.9	0.1	154.0	0.3
Articles of iron or steel	1702.1	4.5			4753.0	1.6	143.5	0.2
Copper and articles thereof	0.4	0.0	2.8	0.2	148.4	0.0	605.3	1.0
Nickel and articles thereof					9.9	0.0	0.9	0.0
Aluminum and articles thereof	384.0	1.0	10.0	0.8	743.5	0.2	197.0	0.3
Lead and articles thereof					4.6	0.0		
Zinc and articles thereof	6.0	0.0			31.4	0.0	1.1	0.0
Tin and articles thereof					5.9	0.0		



Product description	AUS OCTs				EU OCTs			
	Import €'000	(%)	Export €'000	(%)	Import €'000	(%)	Export €'000	(%)
Other base metals; cermets; article					52.4	0.0		
Tools, implements, cutlery, spoons	87.7	0.2	7.3	0.5	972.1	0.3	9.7	0.0
Miscellaneous articles of base meta	81.2	0.2	12.9	1.0	1083.2	0.4	2.3	0.0
Nuclear reactors, boilers, machinery	4346.8	11.6	6.3	0.5	45724.6	15.1	1940.9	3.3
Electrical machinery and equipment	1914.6	5.1	9.3	0.7	7784.2	2.6	1174.2	2.0
Railway or tramway locomotives	1.5	0.0			1380.7	0.5	3697.5	6.2
Vehicles other than railway or tram	3322.0	8.8	1.5	0.1	7638.8	2.5	92.1	0.2
Aircraft, spacecraft, and parts the	3.4	0.0			2440.1	0.8	77.5	0.1
Ships, boats and floating structure	274.1	0.7			3631.8	1.2	1404.1	2.4
Optical, photographic, cinematography	820.0	2.2	171.3	12.8	4928.0	1.6	441.8	0.7
Clocks and watches and parts thereof	4.9	0.0			59.8	0.0	35.2	0.1
Musical instruments					137.7	0.0		
Arms and ammunition	1.8	0.0	2.6	0.2	64.2	0.0		
Furniture; bedding, mattresses	538.5	1.4			1638.2	0.5	375.2	0.6
Toys, games and sports requisites	133.7	0.4			1237.6	0.4	177.5	0.3
Miscellaneous manufactured articles	18.1	0.0			565.5	0.2		
Works of art, collectors' pieces					178.0	0.1	100.1	0.2
Commodities not specified according	11827.2	31.4			12973.9	4.3	1.7	0.0
<b>Total</b>	<b>37622</b>	<b>100</b>	<b>1339</b>	<b>100</b>	<b>303143</b>	<b>100</b>	<b>59260</b>	<b>100</b>

Table III.1.8b: OCTs trade with the EU (2017, values and percent shares, LDCs and NZ OCTs)

Product description	AUS OCTs				EU OCTs			
	Import €'000	(%)	Export €'000	(%)	Import €'000	(%)	Export €'000	(%)
Live animals; animal products	1364.1	0.1						
Meat and edible meat offal	22538.1	1.2			303.4	5.2		
Fish and crustaceans, molluscs and	130.5	0.0	12252.1	1.3			67.9	48.2
Dairy produce; birds' eggs; natural	41338.1	2.2	163.5	0.0	121.7	2.1		
Products of animal origin, not else	38.0	0.0	16.1	0.0				
Live trees and other plants; bulbs,	9.7	0.0	365.6	0.0				
Edible vegetables and certain roots	266609.2	14.0	2606.7	0.3				
Edible fruit and nuts; peel of citrus	3284.7	0.2	2009.5	0.2	73.8	1.3		
Coffee, tea and spices	244.9	0.0	26985.9	3.0	3.4	0.1		
Cereals	359367.1	18.9	1142.9	0.1				
Products of the milling industry; m	15385.6	0.8	48.3	0.0				
Oil seeds and oleaginous fruits; mi	13388.0	0.7	1454.7	0.2	1.5	0.0		
Lac; gums, resins and other vegetables	12.1	0.0	76.6	0.0				
Vegetable plaiting materials; vegetables			63.5	0.0				
Animal or vegetable fats and oils a	2695.3	0.1	480.4	0.1	8.1	0.1	2.1	1.5
Preparations of meat, of fish or of	4204.2	0.2	3532.3	0.4				
Sugars and sugar confectionery	5640.7	0.3	588.5	0.1	71.4	1.2		
Cocoa and cocoa preparations	321.3	0.0	720.2	0.1	11.0	0.2		
Preparations of cereals, flour	4723.4	0.2	990.1	0.1	55.3	0.9		
Preparations of vegetables, fruit,	1470.0	0.1	951.2	0.1	69.8	1.2	9.2	6.5
Miscellaneous edible preparations	4716.6	0.2	275.9	0.0	48.9	0.8		
Beverages, spirits and vinegar	5859.0	0.3	324.1	0.0	739.3	12.6		
Residues and waste from the food in	1671.4	0.1	789.5	0.1	98.9	1.7		
Tobacco and manufactured tobacco supplements	4065.6	0.2	88.8	0.0	5.7	0.1		
Salt; sulphur; earths and stone	476.3	0.0	26834.7	2.9				

Product description	AUS OCTs				EU OCTs			
	Import €'000	(%)	Export €'000	(%)	Import €'000	(%)	Export €'000	(%)
Ores, slag and ash	287.4	0.0	16243.3	1.8				
Mineral fuels, mineral oils	48372.8	2.5	38910.2	4.3	12.9	0.2		
Inorganic chemicals	332918.8	17.5	7.7	0.0				0.0
Organic chemicals	1283.7	0.1	6.8	0.0	4.6	0.1		
Pharmaceutical products	12304.8	0.6	1518.6	0.2	52.9	0.9		
Fertilisers	192.7	0.0			1.5	0.0		
Tanning or dyeing extracts; tannins	13973.0	0.7	5.0	0.0	44.4	0.8		
Essential oils and resinoids; perfumes	2654.9	0.1	210.4	0.0	156.8	2.7		
Soap, organic surface-active agents	2310.2	0.1	64.3	0.0	30.8	0.5		
Albuminoidal substances	405.7	0.0						
Explosives; pyrotechnic products	36.5	0.0						
Photographic or cinematographic goods	152.9	0.0						
Miscellaneous chemical products	6746.6	0.4	111.4	0.0	11.3	0.2		
Plastics and articles thereof	8935.2	0.5	1405.5	0.2	32.1	0.5		
Rubber and articles thereof	3518.5	0.2	232.6	0.0	37.2	0.6		
Raw hides and skins	5154.6	0.3	186.5	0.0				
Articles of leather; saddlery	515.2	0.0	7807.4	0.9	19.5	0.3		
Furskins and artificial fur; manufactured skins	10.6	0.0	0.8	0.0				
Wood and articles of wood	1253.0	0.1	4804.2	0.5	0.9	0.0		
Cork and articles of cork	11.5	0.0						
Manufactures of straw			754.8	0.1				
Pulp of wood or of other fibers	123.1	0.0						
Paper and paperboard	35977.8	1.9	688.9	0.1	154.1	2.6		
Printed books, newspapers, pictures	876.6	0.0	39.7	0.0	51.7	0.9	1.2	0.9
Silk			3.0	0.0				
Wool, fine or coarse animal hair	8.3	0.0	4.3	0.0				
Cotton	260055.5	13.7	12.5	0.0				

Product description	AUS OCTs				EU OCTs			
	Import €'000	(%)	Export €'000	(%)	Import €'000	(%)	Export €'000	(%)
Other vegetable textile fibers	347.4	0.0	2023.7	0.2				
Man-made filaments	21.0	0.0	88.4	0.0				
Man-made staple fibers	278.2	0.0						
Wadding, felt and nonwovens	279.8	0.0	1063.3	0.1				
Carpets and other textile floor covers	138.4	0.0	3638.6	0.4				
Special woven fabrics; tufted textiles	29.1	0.0	72.7	0.0				
Impregnated, coated, covered or lam	316.4	0.0	1.5	0.0				
Knitted or crocheted fabrics	0.7	0.0	0.7	0.0				
Articles of apparel and clothing	476.0	0.0	396613.0	43.5	129.5	2.2		
Articles of apparel and clothing	1053.4	0.1	230117.7	25.2	88.0	1.5	3.1	2.2
Other made up textile articles	4885.5	0.3	44022.3	4.8	80.9	1.4		
Footwear, gaiters and the like	828.5	0.0	26107.2	2.9	84.0	1.4		
Headgear and parts thereof	69.7	0.0	6164.3	0.7	6.2	0.1		
Umbrella, sun umbrellas, walking-sticks	6.0	0.0	237.4	0.0	2.6	0.0		
Prepared feathers and down and artificial	0.0	0.0	367.8	0.0	0.1	0.0		
Articles of stone, plaster, cement,	1209.4	0.1	16.0	0.0	9.6	0.2		
Ceramic products	598.7	0.0	625.6	0.1	19.0	0.3		
Glass and glassware	971.6	0.1	243.8	0.0	8.2	0.1		
Natural or cultured pearls, precious	999.6	0.1	2914.8	0.3	63.7	1.1	41.4	29.4
Iron and steel	38628.2	2.0	73.2	0.0				
Articles of iron or steel	11323.6	0.6	1138.2	0.1	47.2	0.8		
Copper and articles thereof	44136.4	2.3	608.3	0.1	8.8	0.1		
Nickel and articles thereof	23.7	0.0						
Aluminum and articles thereof	7157.0	0.4	456.9	0.1	44.4	0.8		
Lead and articles thereof	7060.3	0.4	7.3	0.0				
Zinc and articles thereof	33393.1	1.8	0.7	0.0				
Tin and articles thereof	50.6	0.0			0.1	0.0		

Product description	AUS OCTs				EU OCTs			
	Import €'000	(%)	Export €'000	(%)	Import €'000	(%)	Export €'000	(%)
Other base metals; cermets; article	162.3	0.0	48.7	0.0				
Tools, implements, cutlery, spoons	4408.1	0.2	726.3	0.1	22.8	0.4		
Miscellaneous articles of base metals	1002.9	0.1	466.9	0.1	48.4	0.8		
Nuclear reactors, boilers, machinery	115864.2	6.1	2885.4	0.3	951.0	16.2	14.3	10.1
Electrical machinery and equipment	37545.7	2.0	21980.0	2.4	356.6	6.1		
Railway or tramway locomotives	879.6	0.0	41.3	0.0				
Vehicles other than railway or tram	17937.2	0.9	3153.0	0.3	365.4	6.2		
Aircraft, spacecraft, and parts the	7408.2	0.4	5164.0	0.6	64.3	1.1		
Ships, boats and floating structure	2710.6	0.1	449.3	0.0	62.0	1.1		
Optical, photographic, cinematography	15441.8	0.8	944.5	0.1	99.8	1.7		
Clocks and watches and parts thereof	247.2	0.0	52.4	0.0	3.1	0.1	1.7	1.2
Musical instruments; parts and ace	141.3	0.0	151.1	0.0				
Arms and ammunition; parts and ace	122.6	0.0	14.6	0.0				
Furniture; bedding, mattresses, mattress	5175.7	0.3	1408.3	0.2	220.6	3.8		
Toys, games and sports requisites	3770.4	0.2	1257.2	0.1	151.9	2.6		
Miscellaneous manufactured articles	458.5	0.0	79.9	0.0	54.5	0.9		
Works of art, collectors' pieces	20.5	0.0	235.0	0.0				
Commodities not specified according	39738.9	2.1			660.8	11.2		
<b>Total</b>	<b>1904951</b>	<b>100</b>	<b>911440</b>	<b>100</b>	<b>5876</b>	<b>100</b>	<b>141</b>	<b>100</b>

## III.2 Social state of play

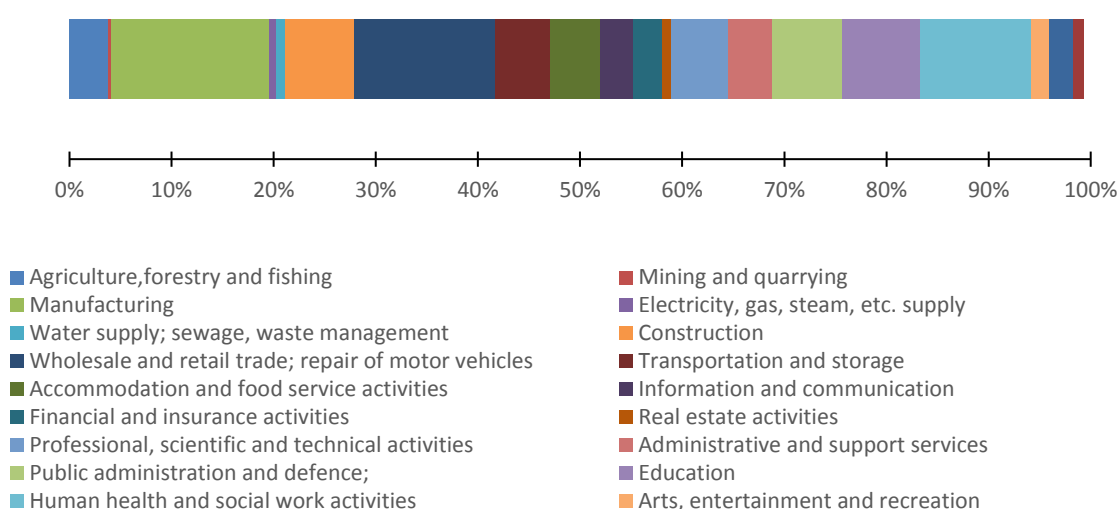
### III.2.1 Overall social state of play

#### Employment Levels

In the EU, the number of jobs continued to grow and in 2018 the record 238.9 million people were employed, the equivalent of the employment rate of 73.2 percent in the age group 20-64 years. The total unemployment rate kept falling and in 2018 it decreased to 6.9 percent. The youth unemployment also continued declining, however, remained higher, at 15.2 percent. It is estimated that in 2017 around 3.2 million jobs were created in the EU, mostly in services (2.8 million). Construction and industry also recorded a solid growth rates, while agriculture noted a slight recovery. In 2017, as in previous years, the highest employment growth (4.3 percent) was recorded for older workers (55-64 years) raising employment rate within this group from 45.5 percent in 2008 to 57.1 percent in 2017. This reflects reforms of national pensions systems aiming at ensuring their sustainability and securing labour supply in times of demographic changes. Moreover, as in previous years, across the skills groups, employment growth was the highest (2.9 percent) for highly qualified workers leading to an employment rate of 85.3 percent in this group (the rate for medium-skilled workers increased up to 75.7 percent and the one for low-skilled workers declined slightly to 55.6 percent) (European Commission, 2017 and 2018a).

Given the importance of education and skills in seizing opportunities in the labour market, Member States continued taking measures to reduce the rate of early school dropouts reaching 10.6 percent in 2017 and to raise the rate of tertiary educational attainment (in 2017, it increased to 39.9 percent). Moreover, they are revising adult learning programmes and training offer to help the adult population and workers to adapt to the ongoing technological changes having impact on the labour market. Currently, the ratio of low-skilled workers to the number of jobs requiring low level of skills in the EU is like three to one, and at the same time more than 40 percent of adults in the EU don't have basic digital skills, with the figure increasing to 70 percent in some Member States. (European Commission, 2018a)

Figure III.2.1: Sectoral shares in total EU employment (2018)



Source: author's own calculations based on EUROSTAT, Labour Force Survey (2018), <https://ec.europa.eu/eurostat/web/lfs/data/database> [accessed on 8 January 2019]

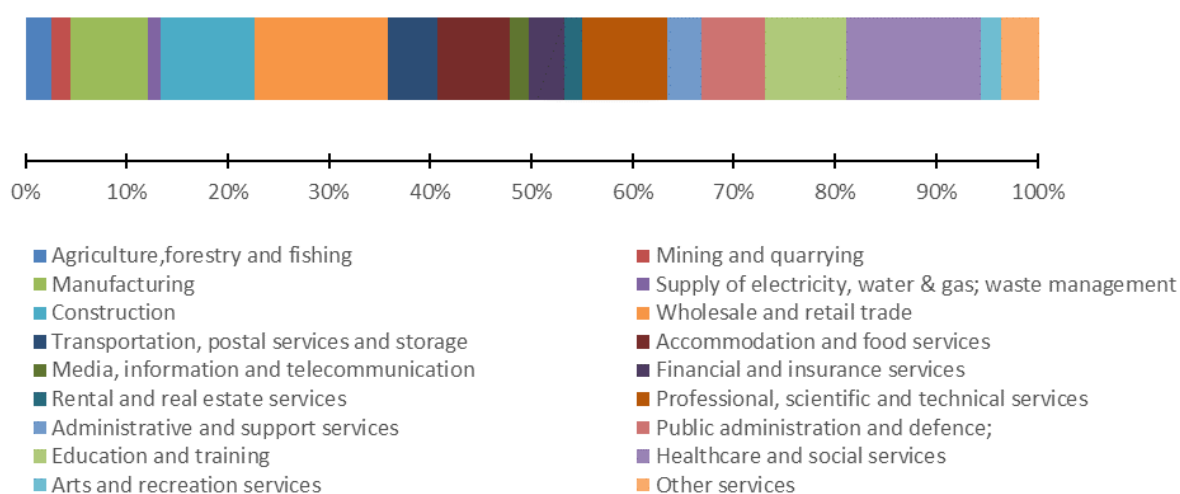
An OECD analysis estimating the risk of jobs being replaced by automation indicates figures from 27 percent in Finland and Estonia to around 45 percent in the Czech Republic and Slovakia. Moreover, the OECD Survey of Adult Skills (2012-2015) indicates a high level of

information-processing skills for Finland, the Netherlands, Sweden and Belgium (Italy and Spain being at the other end of the scale), and problem-solving skills with the same three countries at the top, and Poland and Greece closing EU ranking. (OECD, 2017b) Figure III.2.1 presents sectorial shares in total EU employment in 2018.

In Australia, the employment rate continued to grow and reached 73.8 percent in 2018. (OECD, 2018a) The unemployment rate fell to 5.1 percent. (Australian Bureau of Statistics, 2018a) The youth unemployment rate also continued to decline, however, remained higher, reaching 11.6 percent in 2018. (Riley, 2018) Some groups, such as mothers, lone parents and indigenous people record lower participation rates in the labour market. Their situation has been addressed by targeted Government initiatives. (OECD, 2018b) In the first half of 2018, manufacturing was the main driving force for job creation accounting for 60 percent of new job offers. (Pickering, 2018)

The Government launched initiatives to facilitate increased participation of disadvantaged groups of workers in the labour market, e.g. Career Transition Assistance (planned for a national rollout in 2019) is meant to prepare mature workers for new emerging job opportunities. The Stronger Transitions Package, launched in 2018, has been designed to support workers from five regions strongly impacted by structural change, to transition to new jobs and prepare for jobs of the future. The Youth Jobs PaTH, which started in 2017, helps young people to increase their employability by provision of training, supported job placements for a probation period and wage subsidies if the person is hired. (Department of Jobs and Small Business, 2018a) Other programmes, such as ParentsNext, are designed to support parents, notably the lone ones. There are also initiatives for indigenous peoples with a dedicated tool, Closing the Gap monitoring annual progress. (OECD, 2018b)

Figure III.2.2: Sectoral shares in total employment in Australia (2018)



Source: author's own calculations based on Australian Bureau of Statistics, Labour Force, May 2018, <http://www.abs.gov.au/AUSSTATS/abs@.nsf/DetailsPage/6291.0.55.003May%202018?OpenDocument> [accessed on 9 January 2019]

An OECD analysis estimates that around 32-33 percent of jobs in Australia are at risk of being replaced by automation. This is slightly below the OECD average of around 35 percent. Moreover, the OECD Survey of Adult Skills (2012-2015) indicates a high level of information-processing skills and a good level of problem-solving skills in Australia compared to other OECD countries (the fifth and the seventh rank respectively). This suggests quite a good preparation for jobs requiring work with new technologies and tasks which will not be easily automated. (OECD, 2017b) According to OECD data, more than 60 percent of workers who lose their job due to economic reasons find a new job within one year in Australia, which is one of the best rates in OECD. The process could be supported even further if the re-employment services were provided without the current delays, which may extend to a few months after a job loss. (OECD, 2018) Figure III.2.2 presents sectorial shares in total employment in Australia in 2018.

## **Consumers, welfare, levels of inequality and impacts on vulnerable groups**

In the EU, favourable economic conditions and social benefits' reforms, including minimum income schemes, contributed to increase in disposable households' income. However, in some Member States the latter has not reached yet the pre-crisis level suggesting that GDP growth has not been inclusive enough and has not been translated into comparable welfare increase in the society. In 2017, the real wage increase slowed down (0.5 percent compared to 1.2 percent in 2016) and remained behind the productivity growth (between 2000 and 2017, the productivity per capita increased by 15.6 percent while the real wages by 11.2 percent). Existing labour market reserves, low inflation rate and quite a low productivity growth may explain this trend. The minimum wages were raised in several Member States, in consultation with social partners. Yet, there are persisting high levels of in-work poverty (9.6 percent of the working population) which need to be addressed, e.g. by tax schemes and benefits adequacy. (European Commission, 2018a)

The share of people at risk of poverty or social exclusion in the EU continued to decrease and in 2017 dropped to 113 million people, i.e. 22.5 percent (5 million below the pre-crisis level and 11 million less than in the peak of 2012). Groups of the population most exposed to this risk include young people (aged 18-24), children (notably children of low-skilled parents, non-EU born parents and brought up by single parents), unemployed, unskilled persons with at most the lower secondary education, third country nationals, elderly people and people with disabilities. The number of people living in absolute poverty decreased in 2016 to 7.5 percent (37.8 million). Regarding income inequality, the richest 20 percent of the population had disposable incomes on average 5.1 times higher than the poorest 20 percent. (European Commission, 2017 and 2018a)

In 2016 in Australia, 13.2 percent of the population (3.05 million) lived below the poverty line, including 739,000 children (for comparison, the poverty line declined to 11.5 percent in 2003 before rising to 14.4 percent in 2009 and declining again, after a period of being flat). Poverty rate among children was higher (17.3 percent), however, among children living in single parent households it was 39 percent (compared to 13 percent in families with both parents). Unemployed households were at the highest risk of poverty, with a rate of 68 percent. Households living on wages as a type of income experienced a poverty rate of 7 percent and those relying on the age pension, 15 percent (their situation improved after pension increase in 2009 and the poverty rate declined from 27 percent in 2007). Among family types, single parent households had the highest poverty rate of 32 percent. It is also estimated that 31 percent of Aboriginal and Torres Strait Islander population lives under the poverty line. 34 percent of the people living below the poverty line depend on social security payments as their main income, however, for some types of benefits, this figure raises up to 50-60 percent. Some of them, e.g. relying on the Newstart Allowance fall into a deeper poverty since the amounts of the benefit paid have not been increased for many years. Lower-income groups, including old age pensioners and beneficiaries of Parenting Payment have also been affected by increasing housing costs. (ACOSS, 2018a) As regards income inequality, the richest 20 percent of the Australian population earn on average 5 times more than those from the poorest 20 percent. (ACOSS, 2018)

Wage increase has been very low over the last five years, just keeping pace with the inflation rate. The measures planned by the Government in the 2018-2019 budget, such as cut in personal income tax and raising the minimum wage level are meant to support households' incomes. In some sectors, e.g. hospitality, retail trade and fast-food pays were cut in July 2018. In some other sectors, e.g. mining, retail trade and wholesale trade, and healthcare, wage increase has been on its lowest point within the last few years. (Pickering, 2018) According to experts, it is to expect that wages will start growing (given a declining unemployment rate and difficulties some companies face when hiring), however, it will possibly occur gradually as new people enter the labour market every year and there is still quite a high rate of underutilized workers, i.e. those either unemployed or working involuntary part-time. (Jacobs, 2018)



Regarding affordability and availability of goods and services, important for consumers, there are arrangements between the EU and Australia, which facilitate trade and provide a foundation to build on in an FTA. These include e.g. the EU-Australia Mutual Recognition Agreement. According to stakeholders, it has brought about positive outcomes for bilateral trade flows, such as recognition of conformity assessments reducing administrative burden for exporters. (European Commission, 2017c and 2017d)

## **Job quality**

In the EU, the proportion of temporary workers to all employees remains stable, at 14 percent (in some Member States, up to 26 percent). Temporary workers often face more challenging job quality environment than the permanent workers, e.g. in access to training and career advancement, job security and decision autonomy. They are also three times more likely to be at risk of poverty than those with permanent contracts (16.3 percent compared to 5.8 percent in 2017). Since the beginning of 2008 crisis, the number of part-time jobs increased substantially (by 11 percent) while the number of full-time jobs dropped (by 2 percent). However, as recent figures suggest, this trend may change given that in 2016 proportionally more full-time than part-time jobs were created. Moreover, the share of involuntary part-time jobs decreased from 29.1 percent to 27.7 percent. The share of “platform workers” in total employment was of around 2 percent in the EU in 2017. The lack of clarity concerning their status and form of employment, i.e. employees compared to self-employed, may raise questions about their job quality, rights and social security coverage. (European Commission, 2017 and 2018a) On average, a full-time employee works in the EU 40.3 hours per week, with the mining sector recording the longest (42 hours) and education the shortest (38.1 hours) working week. (EUROSTAT, 2018a) Construction, transportation and storage, manufacturing, and agriculture, forestry and fishing sectors together accounted for 67.2 percent of all fatal accidents at work and 44.9 percent of all non-fatal accidents at work in 2014. (EUROSTAT, 2016)

In 2018 in Australia, an average full-time employee worked for 39.4 hours per week (40.3 for men and 38.1 for women). (Australian Bureau of Statistics, 2018c) Around 74 percent of employed in 2017 worked full-time and 26 percent part-time (OECD data)<sup>9</sup>. However, according to the 2016 Census, 65.5 percent of all employed working full-time and 34.5 percent part-time. (Australian Bureau of Statistics, 2016) The proportion of people having a permanent contract in 2017 to those having a temporary one was 94.7 percent to 5.3 percent.<sup>10</sup> In 2016, the highest number of casual workers were employed in accommodation and food services (20 percent of all casual workers), followed by retail trade (15.4 percent). Construction and agriculture had lower shares (6.6 percent and 2.4 percent respectively). (ILO, 2018a)

The number of fatal accidents at work has been decreasing since 2007 (with 310 fatalities recorded that year for the whole Australian economy) to 182 in 2016, albeit an increase (to 190) was recorded in 2017, i.e. 1.5 fatalities per 100.000 workers. Around half of these accidents occurred in two sectors: transport, postal services and storage, and agriculture, forestry and fishing, followed by construction. The most common types of fatal accidents involved vehicle collisions and falls from altitude. Concerning non-fatal injuries, in 2016-2017, 106,260 compensation claims were made indicating the accident rate of 5.6 per million hours worked. In this context, it is to note that despite the employment growth in sectors generating high numbers of accidents overall, the number of non-fatal accidents at work and related claims has decreased over the last decade by 30 percent in agriculture and 20 percent in construction. (Safe Work Australia, 2018, 2018a, 2018c and Fatality statistics) There have been initiatives taken by farmers associations and industry aiming at improved levels of health and safety at work in the meat and dairy sectors (for details, see Chapter 4). In the construction sector, the Government of New South Wales developed in 2018 in cooperation with industry representatives, trade unions and other stakeholders

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<sup>9</sup> <https://data.oecd.org/emp/part-time-employment-rate.htm#indicator-chart>

<sup>10</sup> <https://data.oecd.org/emp/temporary-employment.htm#indicator-chart>

a Work health and safety sector plan to 2022 aiming to reduce the number of workplace fatal accidents and serious injuries; improve respiratory health by eliminating or controlling exposures to asbestos fibers and crystalline silica dust; improve the quality of licensing, training and assessment related to health and safety at work, identify and target high-risk workplaces and intervene where workers are at high risk. The plan will also address the question of mental health given the number of suicides in the construction sector which is twice as high as the average in the population. (NSW Government, 2018)

It can also be expected that further implementation of Australian Work Health and Safety Strategy 2012–2022 will contribute to the overall improvement of workers' protection. In this context, four reports have been published outlining steps taken in areas covered by the Strategy. These include e.g. development of training materials and a series of videos (virtual seminars) to share information and best practice, preparation of guides (e.g. on a safe plant design), research studies and projects implemented across the country.<sup>11</sup>

Australia has ratified three out of four ILO priority conventions, including convention No. 81 on labour inspection, which is supposed to support effective enforcement of the domestic legislation, including provisions related to job quality. (ILO, NORMLEX)

## **Rights at work**

### *Non-discrimination at work and vulnerable groups of workers*

The EU adopted a Strategy on Disability (2010-2020) outlining actions to take to support people with disabilities, including in access to the labour market. In 2011, the employment rate of people with basic difficulty in activity was 47.3 percent. (EUROSTAT, 2014) People with disabilities belong to the groups most exposed at risk of poverty or social exclusion in the EU. In 2016, the rate of people with disabilities being at risk of poverty and social exclusion was 30.1 percent while for people without disabilities 20.9 percent marking a gap of 9.2 percent (European Commission, 2018a) People with a migrant background are exposed to twice as high risk of poverty than EU-born citizens (41 percent compared to 20.7 percent in 2017) (European Commission, 2018a)

The Australian Government adopted the National disability strategy (2010-2020) including access to employment and decent income, as well as equal access to education among the areas for action. (Department of Social Services, 2010) In 2015, 18.3 percent of Australians, i.e. 4.3 million people reported living with disability. In 2012, 53.4 percent of people with disability, aged 15-64 years participated in the labour force, i.e. either were employed or were actively looking for a job. The rate was considerably lower than the one for people without disability (83.2 percent). The unemployment rate for people with disabilities was 9.5 percent for men and 9.3 percent for women. In 2012, around 40 percent of people with disabilities worked part-time which often was related to type and severity of their disability, although 32.4 percent of them would prefer working more hours. A few sectors had a higher than average (9.3 percent) rate of employed people with disabilities, e.g. agriculture, forestry and fishing (15 percent), administrative and support services (12.7 percent) and health care and social assistance (12.3 percent). (Australian Bureau of Statistics, 2015a) Around 20,000 people with disability work in more than 600 Australian Disability Enterprises, i.e. businesses enabling people with disability to work in a range of industries and enjoy the same working conditions as those being in the general workforce. In 2018, a Taskforce supporting participants of National Disability Insurance Scheme was established with the aim to prioritize job search and employment for beneficiaries. (Department of Social Services, 2018)

In 2016, the population aged 15 years and more (i.e. being of working age) in Australia was 19.1 million people. Out of these, 35 percent (i.e. 6.8 million) were born overseas. In

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<sup>11</sup> Safe Work Australia, Australian Work Health and Safety Strategy 2012-2022: <https://www.safeworkaustralia.gov.au/about-us/australian-work-health-and-safety-strategy-2012-2022>

this group, there were 1.7 million foreign countries' nationals who arrived in Australia since 2006. Among them, 65 percent were employed in 2016. However, there were differences in employment rate, depending on the level of skills and residency status, e.g. 82 percent of skilled migrant visa holders were employed compared to 54-59 percent of family visa and other permanent visa holders, 68 percent of temporary residents and 50 percent of students having right to work. There were also differences between those groups in the share of persons employed full-time (compared to part-time), whereas in all groups, men were more likely (by 12 to 19 percentage points) to work full-time than women. (Australian Bureau of Statistics, 2016a) According to OECD data,<sup>12</sup> out of foreign born migrants being of working age and living in Australia, the majority worked in services sectors: 17.5 percent in wholesale and retail trade, 13.2 percent in real estate, renting and business services, 10.4 percent in health and social services, 7 percent in utilities, including construction, 5.6 percent in hotels and restaurants, 6.4 percent in transport, storage and communications, 4 percent in financial services, 6 percent in education, while 2 percent worked in agriculture and fishing, and 16 percent in manufacturing.

A survey conducted in 2016 on a sample of short-term migrants having right to work provided insights in the lower pay end jobs carried out by migrant workers in Australia. 30 percent of respondents claimed to receive pay equalling half minimum wage foreseen for a casual worker (AUS\$12 instead of 22-44 per hour) with the lowest pays being in the food services (cafes, restaurants and takeaway shops), fruit and vegetable picking, retail trade and cleaning. Respondents from Asian countries tended to be paid less than other nations. (Berg and Farbenblum, 2017) The Australian Government has taken steps to address findings from the survey and set up a Taskforce to examine the situation. The Taskforce completed its work in March 2019 and published a report with 22 recommendations, including a need for targeted information for temporary migrant workers and students having the right to work about their rights and related employers' obligations. Other recommendations suggest e.g. legislative changes to increase protection of migrant workers, prevent employers breaching workers' rights from employing migrant workers, prohibit job adverts offering wages lower than foreseen by the law, increase penalties for violation of workers' rights, qualify serious violation of workers' rights as a criminal offence and strengthen enforcement. (Australian Government, 2019)

To address exploitation of migrant workers in agriculture, there is a call for trade unions and farmers working together to provide monitoring of compliance with employment law and workers' rights and to identify those in the sector who are in breach of the rules. A larger involvement of trade unions in fruit and vegetables sector would be necessary to achieve it. There are also other initiatives, such as Fair Farms, a training and certification scheme for growers, which could also help their customers, such as supermarkets, differentiate those who comply with the rules from others who don't. (McCarthy, 2018) Australia has ratified both ILO fundamental conventions related to non-discrimination at work, No. 100 and 111. (ILO, NORMLEX)

#### *Child labour*

Australia is among the only 16 ILO members (out of 187) who have not ratified yet the Minimum Age Convention No. 138. In Australia, legislation related to child labour is regulated at the State level and currently one of the States, South Australia, doesn't have yet any legislation which would regulate this matter. Its law only envisages that children under 16 years of age cannot work during school hours, which however does not prevent them from working outside that time. In 2018, the State Government of South Australia announced proposal for a new legislation on child labour. (Medianet, 2018) With regard to the Worst Forms of Child Labour Convention No. 182, the ILO Committee of Experts noted in 2014 progress achieved by the Australian States in prohibiting certain types of work for children under 18 years of age. (CEACR, 2014) However, in 2018, the Committee noted

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<sup>12</sup> See: [https://stats.oecd.org/Index.aspx?DataSetCode=DIOC\\_SECTOR](https://stats.oecd.org/Index.aspx?DataSetCode=DIOC_SECTOR)

that in the State of Victoria certain types of work considered hazardous are still allowed for children of 14-17 years of age or above. It requested legislative changes (CEACR, 2018)

The only statistical data identified so far regarding child labour in Australia come from Child Employment Survey carried out by the Australian Bureau of Statistics in 2006. At that time, there were 175,100 children in Australia aged 5 to 14 years who were engaged in a paid work during the preceding year. This included work for an employer, a family business or a farm or own economic activity. They represented 6.6 percent of all Australian children in that age group (1.8 percent aged 5 to 9 years and 11 percent aged 10 to 14 years). For 51 percent of working children and teenagers, the main reason for engaging into work was to earn money for own expenditures, while 24 percent wished to raise savings for the future. Other reasons included investment in friendship and social aspects, and career prospects, and only a small proportion (below 5 percent) thought of supporting family income. Out of those who worked during school term, the majority (74 percent) worked for up to five hour a week, usually in the afternoon (after school) or over the weekends (in the morning). 11 percent of respondents worked for ten or more hours a week during school term. The jobs included delivery of newspapers and leaflets, work in retail trade, on a farm or in a garden, community and personal services, and cleaning. (Australian Bureau of Statistics, 2007)

#### *Forced labour*

According to the Global Slavery Index 2018, in the EU, the estimated figures for people living in conditions of slavery ranged from 145,000 (0.24 percent) in Italy to less than 1,000 in Luxembourg. The Netherlands, the UK, Sweden, Portugal, Croatia, Spain, and Belgium are among countries with the strongest response against modern slavery, including adoption of a dedicated legislation. In 2017, in Belgium, guidelines for public procurement were issued advising how to implement ILO conventions, in 2015 in the UK the Modern Slavery Act was adopted and other Member States have reported progress in implementing the EU non-financial reporting Directive which increases transparency in operation of certain groups of EU-based enterprises. The response often requires strong political commitment, resources, and a strong civil society that holds governments to account.

In Australia, 15,000 persons (or 0.063 percent of the population) is estimated as living in conditions of slavery. The cases occur in agriculture, construction, domestic work, meat processing, cleaning, hospitality and food services. Some relate to migrant workers on short-term visas or illegal workers, including those who entered Australia legally, but overstayed their visas. Conditions considered akin to modern slavery include sub-standard accommodation, illegal pay deductions for rent, pay below minimum wage, the situation of debt bondage, withholding passports, excessive working hours, threats and restrictions of movement. There are also cases of forced labour, or modern slavery related to sexual exploitation and forced marriage. Australia has ratified both ILO fundamental conventions on prohibition of forced or compulsory labour (No. 29 and 105). (ILO, NORMLEX)

However, there are initiatives to address the situation. For example, the "Modern Slavery Act" has been adopted and entered into force in January 2019. It requires companies with AUS\$100 million revenues in Australia, regardless of where they are based to provide a public report on how they identify and combat modern slavery problems in their operations and supply chains.<sup>13</sup> Fair Work Ombudsman provides information and advice to employers and workers including temporary migrant workers and students having right to work.<sup>14</sup>

Moreover, as outlined in the section related to job quality, further to publication of evidence on exploitation of temporary migrant workers, including cases of a serious underpayment for their work, the Australian Government established a Taskforce to examine the situation. (Australian Government, 2019) To address exploitation of migrant workers in agriculture,

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<sup>13</sup> Deloitte, Modern Slavery Act 2018: <https://www2.deloitte.com/au/en/pages/risk/articles/modern-slavery-act-2018.html> [accessed on 8 June 2019]

<sup>14</sup> See: <https://www.fairwork.gov.au/find-help-for/visa-holders-and-migrants> [accessed on 8 June 2019]

there is a call for trade unions and farmers working together to provide monitoring of compliance with employment law and workers' rights and identify those in the sector who breach the rules. (McCarthy, 2018)

#### *Freedom of association and the right to collective bargaining*

EU Member States have developed different models of social partners' engagement in the design and implementation of relevant policies. Social partners have been involved in the reform of wage setting mechanism, including the minimum wage, vocational education and training reforms, assistance for long-term unemployed, and labour law reform. (European Commission, 2017) In addition, at the EU level, Article 154 of the Treaty on the Functioning of the European Union (TFEU) obliges the European Commission to consult social partners on policy and legislative initiatives related to social field. This includes health and safety at work, working conditions, social protection, conditions of employment of third country nationals, equality between men and women in the labour market, and others. (TFEU, OJ 326 C of 26.10.2012) The Commission facilitates also sectorial and cross-industry social dialogue between social partners at the EU level.<sup>15</sup> In 2015-2016, rates of trade union membership varied across EU Member States, from 8 percent in France to 66.8 percent in Sweden.<sup>16</sup>

In 2016 in Australia rate of trade union membership was at 14.6 percent<sup>17</sup> recording a decline from 51 percent in 1976. In the same period, the number of trade union members decreased from 2.5 million to 1.5 million. The underlying reasons for this trend include decreasing employment and trade union membership in sectors where traditionally the rate of trade union membership used to be high (e.g. in large scale car manufacturing, textile, clothing and footwear), employment growth in services sectors where the rate of trade union membership is low (e.g. in retail trade and accommodation and food services), as well as increase in part-time and casual employment (on the expense of permanent and full-time employment) where workers are less likely to be trade union members. Removal of compulsory unionism has also played a role. (Parliament of Australia, 2018)

*Table III.2.1: Rate of trade union membership in total employment by industry in Australia*

<b>Sector</b>	<b>1994</b>	<b>2000</b>	<b>2010</b>	<b>2016</b>
Agriculture, forestry and fishing	12.3	5.4	1.9	1.9
Mining	44.6	32.3	21.3	17.7
Manufacturing	40.8	31.1	17.8	13.3
Electricity, gas, water and waste services	66.4	53.2	37.3	26.3
Construction	34.1	26.4	16.8	10.1
Wholesale trade	14.6	10.4	5.7	5.0
Retail trade	23.3	17.7	15.4	11.4
Transport, postal and warehousing	51.9	36.4	28.8	20.6
Accommodation and food services	19.3	10.3	4.4	2.4
Public administration and safety	54.7	38.1	33.0	32.1
Education and training	56.1	44.1	39.2	32.5
Health care and social assistance	37.0	32.3	26.5	22.2
Arts and recreational services	23.8	17.1	15.5	8.5
<b>TOTAL</b>	<b>35.0</b>	<b>24.7</b>	<b>18.3</b>	<b>13.9</b>

Source: Parliament of Australia (2018), *Trends in union membership in Australia*: [accessed on 25 January 2019] [https://parlinfo.aph.gov.au/parlInfo/download/library/prspub/6272064/upload\\_binary/6272064.pdf](https://parlinfo.aph.gov.au/parlInfo/download/library/prspub/6272064/upload_binary/6272064.pdf)

Australia has ratified both ILO fundamental conventions (No. 87 and 98) on freedom of association and the right to collective bargaining. In 2017, the ILO Committee of Experts

<sup>15</sup> For more information, please see the website of Directorate General (DG) Employment, Social Affairs and Inclusion: <http://ec.europa.eu/social/main.jsp?catId=329&langId=en>

<sup>16</sup> See: <https://stats.oecd.org/Index.aspx?DataSetCode=TUD>

<sup>17</sup> See: <https://stats.oecd.org/Index.aspx?DataSetCode=TUD>



recommended review of the Australian Crimes Act prohibiting industrial action (strike) threatening trade or commerce with other countries or among states. Reviewed should also be provisions of the same Act prohibiting boycotts resulting in the obstruction or hindrance of the performance of services by the Government or the transport of goods or persons in international trade. (CEACR, 2017) The remarks of the Committee of Experts thus make a link between the implementation of the rights at work and international trade, including a smooth implementation of a trade agreement.

## **Corporate Social Responsibility (CSR) and global value chains**

In the EU, CSR is developed and implemented at the national and EU level and included into EU external policies (e.g. trade and investment agreements), dialogues with partner countries, and other international initiatives (e.g. Sustainability Compact for the Ready-Made Garment sector in Bangladesh). Several Member States have developed and implement national action plans or strategies regarding CSR and separate action plans on Business and Human Rights. In 2015, the European Commission published an overview of the EU legal and policy framework related to the UN Guiding Principles on Business and Human Rights, and actions implementing them.<sup>18</sup> Some Member States, e.g. Germany or the Netherlands, promote multi-stakeholder initiatives involving governments, business, and civil society organizations developing solutions to respect human rights, labour, and environmental standards in global value chains in diverse sectors. At the EU level, the European Commission leads, and coordinates CSR activities guided in the last few years by the EU CSR strategy 2011-2014. Applied measures include legislative instruments, such as the Directive 2014/95/EU on disclosure of non-financial and diversity information by large companies<sup>19</sup> and the EU Regulation on responsible sourcing of minerals from conflict affected and high-risk areas, which will enter into force in 2021<sup>20</sup>. The EU also promotes international instruments in the area of CSR and OECD sectorial due diligence guidance documents developed for supply chains in the sectors of minerals, agriculture, extractive industries, textile and garment, and financial services,<sup>21</sup> as well as best practice sharing. The European Commission has also devised guidance documents for business, such as CSR handbook and questionnaires for SMEs and their advisers. In the context of trade and sustainable development chapters of the EU FTAs, discussions promoting CSR and sharing best practice were held in 2017-2018 at workshops with partner countries, e.g. Central America and the Republic of Korea. There are also assistance projects supporting CSR development and responsible supply chains, e.g. in the Asian countries<sup>22</sup>.

In 2016, Australia underwent a Universal Periodic Review at the UN and received among the recommendations a suggestion of developing a National Action Plan on Business and Human Rights. The Australian Government organized consultations with business (in form of roundtables) and set up a multi-stakeholder Advisory Group on this matter. The Group composed of business representatives, academia and civil society stated that they see a value in development of a National Action Plan on Business and Human Rights, however the Government announced it would not proceed with the Action Plan. This was communicated to the UN and received with a disappointment.<sup>23</sup> In January 2019, the "Modern Slavery Act" entered into force. It requires companies with AUS\$100 million revenues in Australia, regardless of where they are based to provide a public report on how they identify and combat modern slavery problems in their operations and supply chains.<sup>24</sup>

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<sup>18</sup> For more details related to Business and Human Rights at the EU and Member States' level, please, see : [http://ec.europa.eu/growth/industry/corporate-social-responsibility/in-practice\\_en](http://ec.europa.eu/growth/industry/corporate-social-responsibility/in-practice_en)

<sup>19</sup> [https://ec.europa.eu/info/business-economy-euro/company-reporting-and-auditing/company-reporting/non-financial-reporting\\_en](https://ec.europa.eu/info/business-economy-euro/company-reporting-and-auditing/company-reporting/non-financial-reporting_en)

<sup>20</sup> <http://ec.europa.eu/trade/policy/in-focus/conflict-minerals-regulation/regulation-explained/>

<sup>21</sup> For more details, please consult OECD website: <http://www.oecd.org/corporate/mne/>

<sup>22</sup> [http://trade.ec.europa.eu/doclib/docs/2018/march/tradoc\\_156624.pdf](http://trade.ec.europa.eu/doclib/docs/2018/march/tradoc_156624.pdf)

<sup>23</sup> National Action Plans on Business and Human Rights: <https://globalnaps.org/country/australia/>

<sup>24</sup> Deloitte, Modern Slavery Act 2018: <https://www2.deloitte.com/au/en/pages/risk/articles/modern-slavery-act-2018.html> [accessed on 8 June 2019]

Regarding OECD Guidelines for Multinational Enterprises and National Contact Points (NCP) established in this framework, it is to note that further to a 2017 review of the Australian NCP's activity in handling specific instances (complaints), Australian Treasury (NCP host) announced five initiatives to improve it. They include: 1) setting up an Independent Examiner's function who will take over handling of specific instances; 2) establishing a new advisory committee composed of Government officials, two business representatives and two persons from civil society); 3) publication of an improved procedural guidance; 4) budgetary allocation for NCP operation; and 5) improving outreach to stakeholders with two events to be organized each year.<sup>25</sup>

A survey conducted in 2017 involving 856 companies from Australia provided information about CSR practices in private sector and the way of addressing Sustainable Development Goals. The latter were included into the companies' reporting, business strategies, value chain operation or a separate CSR strategy, whereby this one was mostly developed by foreign-owned companies originating in Europe or North America, thus reflecting actions developed and managed by their overseas Headquarters. According to respondents, CSR reporting contributed to building their company's reputation as a responsible business and helped in positioning its brand. It was also conducive to engaging with leadership and stakeholders in a dialogue about the company and its strategy and helped to identify areas for improved performance. Global Reporting Initiative (GRI) was the mostly used reporting framework. 83 percent of respondents named building stronger relationships with stakeholders as the top priority for the immediate future. Respondents based in Australia or New Zealand (which was also covered by the survey) represented mainly the services sector, e.g. professional and consulting services (20 percent), banking (13 percent), utilities (10 percent), transport (9 percent), financial and insurance services (6 percent) and IT (6 percent), followed by engineering, manufacturing and mining industries, with a majority represented by large companies (79 percent of respondents employing 500 workers or more). (ACCSR, 2017)

Another survey reported in 2018 by Deloitte with 860 respondents from Australia suggests that companies recognize benefits from pursuing CSR/RBC practices. In their view, they include strengthened reputation, reduced risk, strengthened competitive advantage, new value created through new products or markets, reduced costs, reduced complaints and/or disagreements with stakeholders and a greater willingness of activist groups to engage and negotiate. (Deloitte, 2018)

### **Public policies – social protection, education and health care**

EU Member States have pursued reforms of the social protection systems, e.g. by increasing retirement age, limiting access to early retirement, and focusing on protection of those who receive low pensions, to ensure decent living standards. In other parts of the social protection system, the reform efforts are focused on extending coverage (e.g. to include self-employed and free lancers), improving adequacy of social benefits, and encouraging peoples' activity. Regarding pension systems, the Member States are encouraged to align the pension age of men and women to avoid poverty among female pensioners, and to raise minimum pensions or decrease tax burden on low pension incomes. (European Commission, 2017) Member States are also modernizing their education and training systems. Further steps in this area should focus on continued learning and skills upgrading, a better alignment of education programmes and obtained skills with the labour market needs, coordination between business and education providers, and the use of apprenticeships. (European Commission, 2017)

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<sup>25</sup> Treasury response to the 2017 AusNCP Independent Review: <http://ausncp.gov.au/contactpoint/2017-review/2017-review-response/> [accessed on 8 June 2019]

Several Member States have implemented as well healthcare reforms to encourage the provision of and access to effective primary health care services, enshrine promotion of good health and prevention of diseases in primary care, streamline and increase the sustainability of specialist and hospital care, and to improve the access to affordable medicines used in a cost-effective way. Some Member States are also taking steps to improve the efficiency and quality of long-term care services. This should promote social inclusion and reduce obstacles to labour market participation for family carers, especially women. (European Commission, 2017)

Australia has taken steps to improve equality in skills development and access to education and training, including for indigenous people. (OECD, 2013) By 2016, 95 percent of children in the country had access to quality early childhood education programmes and in most cases this rate was also achieved for children from indigenous communities. 93 percent of children had access to such programmes for 600 or more hours (15 hours per week) compared to 12 percent in 2008. A gap between indigenous people and other parts of the population has decreased also at the high school level with the rate of Year 12 attainment among indigenous people increasing from 45.4 percent in 2006 to 61.5 percent in 2015. Additional funding is also provided to enable students from low socio-economic background to enter a university and graduate. Moreover, Australia's National Partnership Agreement on Skills Reform launched in 2012 aimed at improving access to vocational education and training and labour market. Australia has also implemented policies to strengthen science, technology, engineering, and mathematics (STEM) in early learning and at school. (OECD, 2018d)

The Australian social protection and social benefits system is structured in a way that most of the social benefits are paid in amounts remaining below the poverty line, which means that the beneficiaries will either live in poverty or will have a chance to improve their living standard by adding another income source, e.g. part-time wage. Moreover, unlike pensions, most of the social benefits are increased only to match the inflation rate and do not catch up with the wage increase or rise in housing prices, which further opens the gap between the wage earners and those who live on social benefits. Since 2005, a few changes were introduced to the system. This included e.g. pension rise in 2009 improving the living standard and bringing about poverty reduction of pensioners. Other changes involved decoupling increase of some benefits from wage growth leaving their amounts almost unchanged over longer periods, and tightening eligibility criteria for some others, reducing the number of beneficiaries or diverting them to new, lower allowances. (ACOSS, 2018a)

In Australia, 69 percent of health spending is funded jointly by the Australian Government and state and territory governments providing respectively AUS\$75 billion and AUS\$50 billion in the financial year ending in June 2017. Total government spending on health grew by 6.8 percent in real terms in 2016–17, which was above the average growth rate for the previous 5 years of 2.6 percent. Tax revenue is the main source of government income used to fund public services, incl. health care. Due to the relatively rapid growth in government spending, the ratio of government health expenditure to tax revenue increased in 2016–17 following a period of relative stability (rising by 0.8 percentage points to 27.1 percent). The average real growth in health expenditure over the decade to 2016–17 was similar for the Australian Government and state and territory governments (4.5 percent and 4.6 percent, respectively), though the average growth in the last 5 years was greater for states and territories (3.1 percent compared with 2.4 percent).<sup>26</sup>

Public expenditure on all levels of education (pre-primary, primary, secondary, university, and technical and further education) of the Australian Government and state and territory governments increased by AUS\$4.3 billion (4.5 percent), from AUS\$95.4 billion in 2016–

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<sup>26</sup> Australian Institute of Health and Welfare (2018), Health expenditure Australia 2016–17: <https://www.aihw.gov.au/reports/health-welfare-expenditure/health-expenditure-australia-2016-17/contents/summary> [accessed on 8 June 2019]



17 to AUS\$99.7 billion in 2017-2018. Total expenditure on education by the Government was AUS\$37.3 billion, while the state and local governments contributed with AUS\$65.2 billion. (Australian Bureau of Statistics, 2019)

Social security and welfare expenditure in 2018-2019 are estimated to total AUS\$176 billion, representing 36 percent of the Australian Government's total expenses. It is also projected to further increase to reach AUS\$194.3 billion in 2021-2022. It includes pensions, family payments (e.g. childcare subsidy), allowances, parental leave pay, funding for aged care services, National Disability Insurance Scheme and payments and services for veterans and their dependents.<sup>27</sup>

### III.2.2 Overall gender equality state of play

#### Women as workers

In 2017 in the EU, the employment rate of women continued to raise reaching 66.4 percent. With the employment rate for men being at 77.9 percent, this meant a persistent gap of 11.5 percentage points. Women are increasingly well-qualified and in certain age groups outperform men in educational attainment (e.g. in 2017, 44.9 percent of women aged 30-34 had tertiary education compared to 34.9 percent among men). Yet, they tend to work fewer hours (in 2017, the total EU part-time employment rate for women of 31.1 percent was higher by 23 percentage points than that for men, 8.2 percent). Women also tend to have lower-ranking jobs than men and be more present in lower paying sectors. The sectoral segregation also persists among skilled professionals where women choose law or health care and are underrepresented in such professions, as engineers or ICT experts. (Figure III.2.3 outlines sectorial shares in total employment in the EU in 2018 in a break-down by gender.) These factors contribute to a gender pay gap (16.2 percent in 2016), which combined with a usually shorter career translates into lower pensions for women (gender gap of 37.2 percent in 2016). Additional challenges on the labour market are faced by vulnerable women, i.e. older ones, single parents, with disabilities, or with a migrant or ethnic minority background. (European Commission, 2018a, 2018b, 2017a) According to a study carried out in 2014, 12.3 million jobs occupied by women in the EU depended on exports (Rueda-Cantuche, Kutlina-Dimitrova et al, 2018). Also, in this case a gender gap has been revealed: the figure represented 38 percent of all EU export-dependent jobs while female employment equalled 46.1 percent of total EU employment in the same year.<sup>28</sup>

In 2016, challenges in entering the labour market were faced especially by mothers and women with care responsibilities (e.g. in six Member States, over 50 percent of potential female workforce aged 25-49 were inactive because of the need to look after children or disabled adults; moreover, the employment rate of mothers with children under the age of 6 was up to 30 percentage points lower than that of women without children). Factors influencing negatively women's situation on EU labour market include insufficient child care and other care facilities, fiscal disincentives for second earners (substantial effective tax increase and/or withdrawal of benefits following increase in salary or in number of working hours), and insufficient availability of flexible working arrangements (e.g. lack of a possibility to work for part of the weekly time from home). Member States have taken steps to increase the availability of childcare facilities, introduce more balance between men and women in parental leave, encourage women to return to work after childbirth, raise awareness about non-discrimination at work and increase transparency regarding wage levels. (European Commission, 2018a, 2018b, 2017, 2017a) At the EU level, the Commission presented in 2017 a policy and legislative package "The initiative on work-life

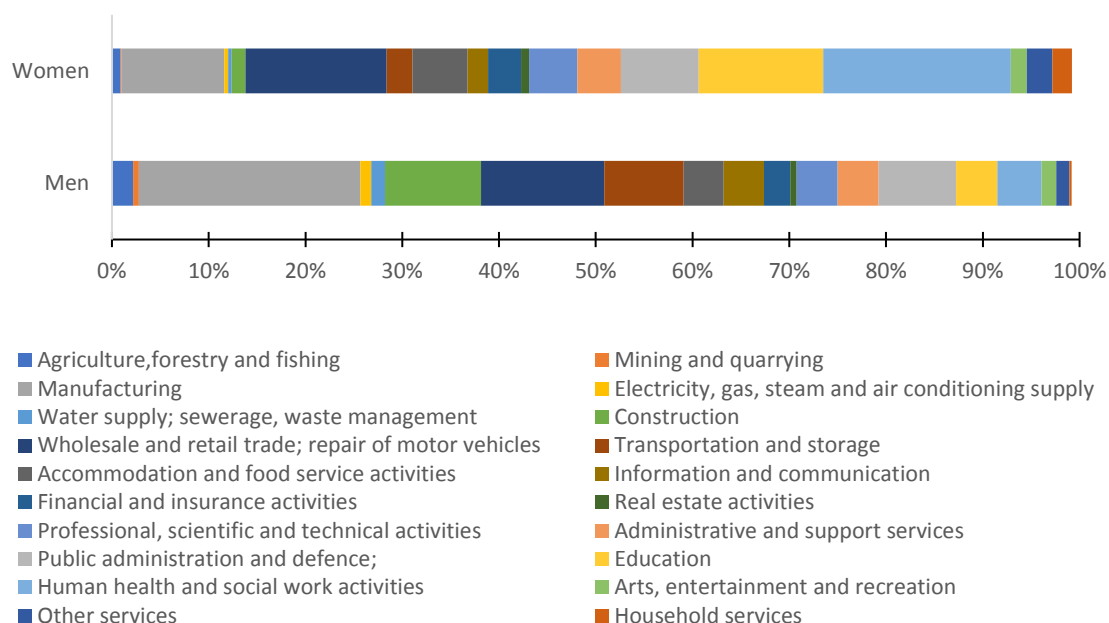
<sup>27</sup> Parliament of Australia, welfare expenditure, an overview: [https://www.aph.gov.au/About\\_Parliament/Parliamentary\\_Departments/Parliamentary\\_Library/pubs/rp/BudgetReview201819/Welfare](https://www.aph.gov.au/About_Parliament/Parliamentary_Departments/Parliamentary_Library/pubs/rp/BudgetReview201819/Welfare) [accessed on 8 June 2019]

<sup>28</sup> This may be explained to some extent by the fact that women are often occupied in sectors with lower presence in international trade, such as education, health care and social services, and public administration.

balance for working parents and carers” that aims at modernizing EU legislation in the area of family-related leave and flexible working arrangements. The Commission adopted an Action Plan to tackle the gender pay gap 2017-2019, (European Commission, 2018b) and the „EU strategic engagement for gender equality 2016-2019”. (European Commission, 2016)

Women account for 25.3 percent of board members in the largest publicly listed companies registered in the EU Member States, with the share ranging from 43.4 percent in France to 7.4 percent in Estonia. (European Commission, 2018b)

*Figure III.2.3: Sectoral shares in total EU employment by gender (2018)*

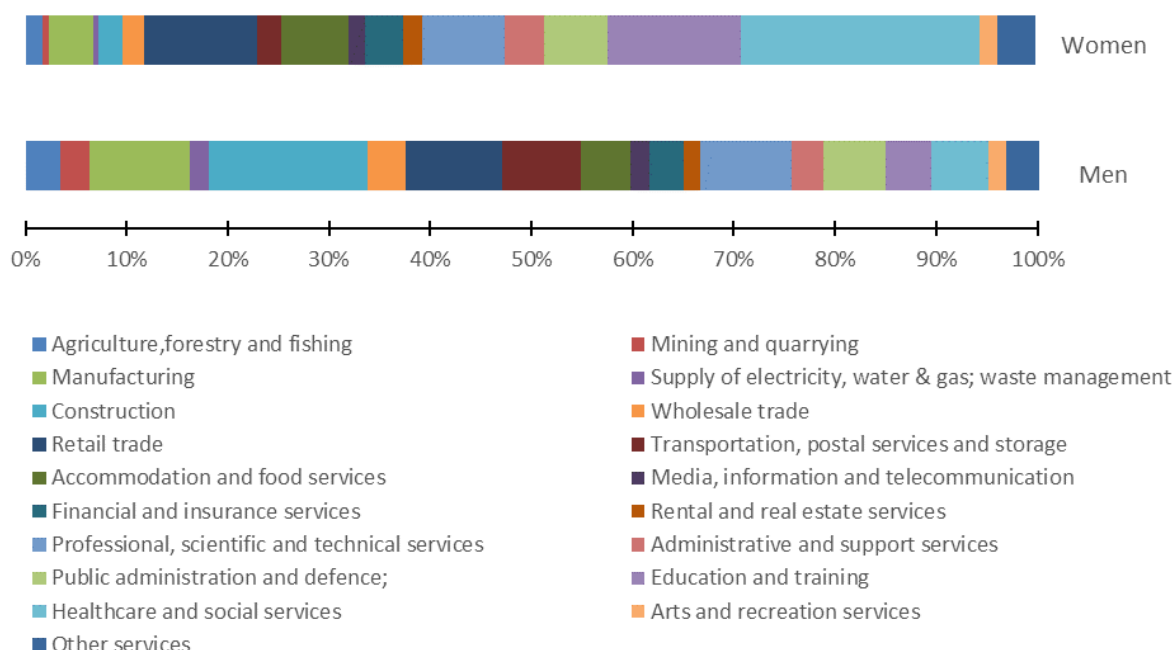


Source: author's calculations based on EUROSTAT, Labour Force Survey (2018), <https://ec.europa.eu/eurostat/web/lfs/data/database> [accessed on 13 October 2018]

In 2018 in Australia, the employment rate for women aged 20-74 years was 64 percent, for men 75 percent. The unemployment rate was comparable: 4.8 percent for women and 4.6 percent for men. More women (44 percent) than men (16 percent) worked part-time and this difference was even more pronounced among couples having children under six years of age, where 61 percent of mothers and 7.9 percent of fathers worked part-time. Also, more women (9.4 percent) than men (5.8 percent) worked involuntarily part-time, i.e. were ready to take more hours than offered. (Australian Bureau of Statistics, 2018b). On average, women have a higher degree of education, however, earn 14.6 percent less than men. In private sector (in organizations employing 100 persons or more) gender-related pay gap is higher and varies between 17.3 percent, and 22.4 percent. According to data collected by the Workplace Gender Equality Agency, in Australian companies and other organizations, women hold 13.7 percent of chair positions and 24.9 percent of directorships and represent 16.5 percent of CEOs and 29.7 percent of key management personnel. 70.9 percent of reporting organizations have a male-only team of key management personnel. (Workplace Gender Equality Agency, 2018) In 2017, the Government adopted a Strategy to boost women's workforce participation. Its implementation assumes enabling 200,000 women more by 2025 to take a job. Actions planned within the strategy include increased availability of child care facilities and financial assistance for child care costs, encouraged flexibility at work, for both men and women to facilitate work-family balance and more equal sharing of family and care responsibilities, promotion of women to managerial posts and fields where they are underrepresented (e.g. science and engineering), increased women's economic security (e.g. through tax measures, paid parental leave, increased savings for pensions and closing gender pay gap) and financial incentives to work. (Office

for Women, 2017) Figure III.2.4 outlines sectorial shares in total employment of women and men, respectively, in Australia in 2018.

Figure III.2.4: Sectorial shares in total employment in Australia by gender (2018)



Source: author's own calculations based on Australian Bureau of Statistics, *Gender indicators, Economic security*, September 2018, [accessed on 12 January 2019]

<http://www.abs.gov.au/ausstats/abs@.nsf/Lookup/by%20Subject/4125.0~Sep%202018~Main%20Features~Economic%20Security~4>

### Women as entrepreneurs

According to a study prepared for the European Commission, in 2012, the share of women among EU entrepreneurs was 31 percent (10.3 million persons), recording an increase from 28 percent in 2008. The rate varied between the EU Member States from 18 percent in Malta and 20 percent in Ireland to 40 percent in Lithuania and Latvia. Compared to the total labour force, the number of entrepreneurs (rate of entrepreneurship) in the EU was 10 percent for women and 19 percent for men. 23 percent of female entrepreneurs employed workers; the rest acted as solo entrepreneurs (with different legal forms of the undertaking). Among men, employers made up 30 percent of entrepreneurs. 22 percent of female entrepreneurs had lower than the secondary education, 42 percent had a secondary education and 36 percent had a higher education level. 31 percent worked part-time in their enterprises, the reasons being having a second job, family responsibilities, illness, disability, old age, and need for leisure time. (European Commission, 2014) Table III.2.2 outlines the main sectors of activity of women-led enterprises in the EU.

30 percent of EU farmers were women (93 percent of them being solo entrepreneurs). In eight EU Member States, for which data on size of women-led enterprises is available, 94 percent of women-led undertakings were microenterprises, 5 percent small ones and 1 percent medium and large ones (European Commission, 2014). The main challenges faced by female entrepreneurs included access to finance, information, training, and networks for business purposes, as well as reconciliation of business and family life.<sup>29</sup>

The EU and Member States developed tools to support women in their entrepreneurship, e.g. WEgate (launched in 2016) provides a "one-stop-shop" for women who want to start, run or grow a business. It provides information about access to training, mentoring, advice and business networking opportunities. Another tool, a policy network supporting and

<sup>29</sup> DG GROWTH: <http://ec.europa.eu/growth/smes/promoting-entrepreneurship/we-work-for/women/>

promoting female entrepreneurship brings together government and other institutions' representatives from 31 countries (EU, Norway, Iceland and Turkey) to provide advice, information, and contacts regarding existing support measures for female entrepreneurs, as well as to identify good practices.

*Table III.2.2: Share of women-led enterprises in the EU by sector, 2010*

Sector	Women-led enterprises as % of all enterprises in the sector
Human health and social work	60
Other services	65
Education	55
Accommodation and food services	39
Administrative and support services	37
Professional, scientific and technical activities	34
Trade (wholesale and retail)	33
Agriculture, forestry, and fishing	30
Financial and insurance services	26
Manufacturing	20
Information and communication	20

Source: European Commission (2014).

The European Network of Female Entrepreneurship Ambassadors launched in 2009 is made up of around 270 entrepreneurs from 22 European countries. Their aim is to act as role models by telling their story to raise awareness and encourage entrepreneurship as a career option for women of all ages. The work of the network has brought about tangible results: over 650 national meetings have been organized, reaching more than 61 000 would-be women entrepreneurs. The ambassadors have supported creation of more than 250 new women-led enterprises and created 22 networking and business support clubs for women. The European Network of Mentors for Women Entrepreneurs was inaugurated in 2011 and brings together representatives of 17 EU and Western Balkan countries. It provides advice and support to women entrepreneurs on the start-up, management and growth of their businesses in the early phases.<sup>30</sup>

In 2014, 34 percent of all Australian entrepreneurs were women, whereby their number increased by 46 percent over the last 20 years. Female entrepreneurs made up 12.5 percent of all employed women in Australia, with one third of them being owner managers of incorporated companies and the rest of unincorporated ones (the latter category includes also sole traders). In 2013, 8 percent of female business operators had a second job, out of which 40 percent ran another business, 58 percent were employees and the remaining 2 percent were volunteers or unpaid family workers. In 2011, 42 percent of female entrepreneurs (compared to 31 percent among men) had a diploma or a degree of tertiary education (20 percent had not more than lower secondary education). (Australian Bureau of Statistics, 2015) In other words, there are around 700,000 women who own and manage a business (data of March 2018). They can benefit from support programmes designed for all who wish to start or expand their undertaking, e.g. services of Entrepreneurship Facilitators providing information, advice and tailored mentoring.<sup>31</sup> (Australian Government, 2017) In 2011, female owners of unincorporated businesses had an average weekly disposable income lower than male business operators and female employees (AUS\$522 compared to AUS\$831 and AUS\$834 respectively). (Australian Bureau of Statistics, 2015)

In 2011, women-led businesses operated mainly in the area of professional, scientific, and technical services (13 percent of the total), followed by retail trade (12 percent), health

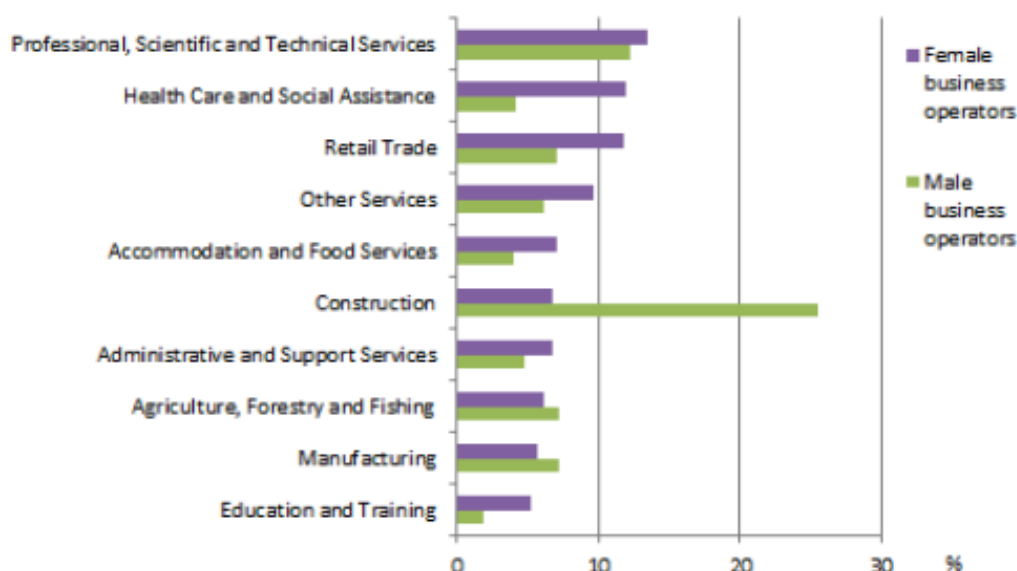
<sup>30</sup> For details, about initiatives supporting female entrepreneurs at the EU level, please see: [http://ec.europa.eu/growth/smes/promoting-entrepreneurship/we-work-for/women/support-networks\\_en](http://ec.europa.eu/growth/smes/promoting-entrepreneurship/we-work-for/women/support-networks_en).

<sup>31</sup> For more information about the Entrepreneurship Facilitators programme, please see: <https://www.jobs.gov.au/entrepreneurship-facilitators> [accessed on 18 January 2019]

care and social assistance (12 percent), “other services” (9 percent), and accommodation and food services (8 percent). Businesses owned by men operated in construction (26 percent), professional, scientific, and technical services (12 percent), agriculture, forestry and fishing (7 percent), and manufacturing (7 percent). According to 2010 data, businesses operated by men and women didn’t differ significantly in demand for business finance or type of financial assistance used and the rate of success when applying for it. However, new and home-based undertakings (typically led by women) faced more challenges in this respect. Figure III.2.5 provides further details. (Australian Bureau of Statistics, 2015)

In 2011, Aboriginal and Torres Strait Islander women ran 2890 businesses, representing 0.6 percent of all female business operators. They were active mainly in health care and social services (12 percent), retail trade (11 percent) and other services (11 percent). Around 48 percent of them worked as sole traders while 5 percent had 20 or more employees. Migrant women made up 30 percent of all female business operators in Australia, disabled women represented 12 percent, and women living in remote areas 2.3 percent. In 2014, 28 percent of female-led businesses were managed by women aged 55 years and more. (Australian Bureau of Statistics, 2015)

Figure III.2.5: Business operators\* in Australia (2011), broad industry by gender



\* Owner managers of incorporated and unincorporated businesses, aged 15 years and over

Source: Australian Bureau of Statistics (2015), *A profile of Australian women in business* (data based on Australian Bureau of Statistics, *Census of Population and Housing, 2011*) [accessed on 18 January 2019]: [https://www.pmc.gov.au/sites/default/files/publications/profile\\_of\\_australian\\_women\\_in\\_business.pdf](https://www.pmc.gov.au/sites/default/files/publications/profile_of_australian_women_in_business.pdf)

### Women as traders

In the EU, the European Commission has been leading discussion on women economic empowerment and trade to explore ways of promoting increased women’s participation in international trade and identify barriers preventing women from seizing opportunities offered by trade agreements, as well as to develop tools and share experience in gender-based analysis of trade policy. This included e.g. launch with the UN Women and the ILO of a three-year WE EMPOWER programme promoting economic empowerment of women at work through responsible business conduct, adoption of a recommendation on trade and gender under EU-Canada FTA,<sup>32</sup> negotiation of a trade and gender chapter under EU-Chile modernized AA, organizing an International Forum on Women and Trade in 2017, debate at the European Development Days in 2018 and participation in seminars organized further to the 2017 Buenos Aires Declaration on Trade and Women’s Economic Empowerment.<sup>33</sup>

<sup>32</sup> See: <http://trade.ec.europa.eu/doclib/events/index.cfm?id=1949> [accessed on 15 February 2019]

<sup>33</sup> For more information, see: International Forum on Women and Trade: <http://trade.ec.europa.eu/doclib/press/index.cfm?id=1632>; European Development Days: <https://eudevdays.eu/community/sessions/1004/trade-and-womens-economic-empowerment>.



In Australia, the Government agency Austrade provides services for women involved in international trade, e.g. by sharing market information and advice, offering Women in Export Scholarship to attend a targeted course and facilitating links with networks promoting success stories and offering training, advice and networking opportunities for women doing business and trading internationally.<sup>34</sup> The Australian Government was among supporters of the 2017 Buenos Aires Declaration<sup>35</sup> and has been involved in the APEC<sup>36</sup> initiatives promoting women's participation in economic activities and international trade (women, SMEs and inclusive growth form the third one out of four priorities of the Chilean Presidency in APEC in 2019)<sup>37</sup>. These include e.g. "Gender Inclusion Guidelines"<sup>38</sup>, a tool adopted by APEC in 2017 to integrate gender dimension into work of APEC's forums across five pillars: 1) access to capital and assets, 2) access to markets, 3) skills, capacity building and health, 4) leadership, voice and agency, 5) innovation and technology. (Braun, 2018)

A survey carried out in 2015 by Women in Global Business<sup>39</sup> and the University of Melbourne provides insights about engagement of Australian women-owned companies in international trade. Out of 416 surveyed women, 337 have been involved in international trade, including 134 business owners and 152 women employed in other strategic roles. Around 90 percent of the women-owned enterprises in the sample are SMEs having less than 20 employees, with 66-82 percent having less than 5 employees. (This reflects profile of the total of Australian enterprises.) Those already involved in international trade operate mainly in the services sectors, such as education and training (17 percent), business and finance (11 percent), and ICT (10 percent). Sectors related to trade in goods, e.g. food and beverages, consumer goods, agribusiness, and textile, footwear and clothing have each 5-7 percent in the sample. The main trading partners are the US, China and the UK. Asia dominates among regions. Key motivations of going international include search for new markets, following a key customer, being approached by an overseas client, following main competitors, increased credibility thanks to expansion, accessing resources and innovation. Regarding barriers impeding their international activity, female business owners named high value of the Australian dollar, a difficulty in identifying a suitable distributor, documentation and red tape required to establish operations, and access to finance. These were followed by transportation costs and shipping arrangements and tariffs faced by exporters in the destination markets. (WIGB, 2015)

### **Women as consumers**

Women in their role of consumers are considered together with other groups of consumers in the general part of the social impacts' analysis.

## **III.3 Human Rights state of play**

### **Current human rights situation in the EU**

Human rights relationship between the EU and Australia are governed by the EU-Australia partnership framework,<sup>40</sup> that establishes, among others, cooperation between the parties

<sup>34</sup> Austrade, Women in Export: <https://www.austrade.gov.au/Australian/How-Austrade-can-help/Trade-services/women-in-export> [accessed on 18 January 2019]

<sup>35</sup> See text of the Declaration and the list of supporting countries: [https://www.wto.org/english/news\\_e/news17\\_e/mc11\\_12dec17\\_e.htm](https://www.wto.org/english/news_e/news17_e/mc11_12dec17_e.htm)

<sup>36</sup> Asia-Pacific Economic Cooperation, an inter-governmental forum of 21 Pacific Rim member economies.

<sup>37</sup> Priorities for APEC, Chile 2019: <https://www.apecchile2019.cl/apec/apec-chile/priorities-apec-2019> [accessed on 18 January 2019]

<sup>38</sup> APEC Gender Inclusion Guidelines: <https://www.apec.org/Publications/2017/11/APEC-Gender-Inclusion-Guidelines> [accessed on 18 January 2019]

<sup>39</sup> The Women in Global Business program is a joint Australian, State and Territory government initiative established in December 2010. See: <https://www.bulletpoint.com.au/wigb/> [accessed on 18 January 2019]

<sup>40</sup> Delegation of the European Union to Australia, 2016. Towards a closer EU-Australia Partnership: Joint Declaration of the EU's High Representative for Foreign and Security Policy/Vice President of the Commission and the Australian Foreign Minister,

in the area of human rights, particularly laid down as a “commitment to advancing the protection and promotion of human rights”.<sup>41</sup>

### **Human rights framework**

“The Union is founded on the values of respect for human dignity, freedom, democracy, the rule of law and respect for human rights” says Article 2 of the Lisbon Treaty. Human rights are guaranteed at the EU level by the EU Charter of Fundamental Rights (CFR) adopted in 2000 and having a binding nature on all EU member states following the Lisbon Treaty of 2009. The Charter is consistent with the European Convention on Human Rights (ECHR) ratified by all the member states. All EU institutions stand by the values of the Union. Fundamental Rights Agency (FRA), was established to perform the tasks of collecting and analyzing information and data on human rights, providing independent and evidence-based advice and expertise in the field and communicating and raising fundamental rights awareness.<sup>42</sup>

The European Union’s trade relations, just like its other external actions, are guided by its commitment to support and promote democracy and human rights as it is established in the Lisbon Treaty (Art. 3(5), Art. 21(1) (3) TEU and Art. 207(1) TFEU). Moreover, Article 6(1) TEU gives the Charter the binding legal value equal to that of the Treaties by mandating that the EU legal order ‘recognizes the rights, freedoms and principles set out in the Charter of Fundamental Rights’. In line with the Strategic Framework on Human Rights and Democracy, the EU is committed to “promote human rights in all areas of its external action without exception” (Council of the European Union 2012: 2). This position is supported and developed in the policy documents of the European Commission.<sup>43</sup> The UN 2030 Agenda for Sustainable Development which “envisages a world of universal respect for human rights” (United Nations, 2015: 4), is applied in several EU policy documents further affirming its commitments with respect to human rights and strengthening their importance.<sup>44</sup> Every year FRA publishes a report reflecting on the progress and setbacks of human rights protection at the EU level and proposes recommendations for improvement.

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[http://eeas.europa.eu/archives/delegations/australia/press\\_corner/all\\_news/news/2015/2015\\_2304\\_en.htm](http://eeas.europa.eu/archives/delegations/australia/press_corner/all_news/news/2015/2015_2304_en.htm) [accessed 20 January 2019].

<sup>41</sup> European Parliament non-legislative resolution of 18 April 2018 on the draft Council decision on the conclusion on behalf of the Union of the Framework Agreement between the European Union and its Member States, of the one part, and Australia, of the other part (15467/2016 – C8-0327/2017 – 2016/0367(NLE) – 2017/2227 (INI)), <http://www.europarl.europa.eu/sides/getDoc.do?type=TA&reference=P8-TA-2018-0109&format=XML&language=EN> [accessed 20 January 2019].

<sup>42</sup> See FRA website, <https://fra.europa.eu/en/about-fra/what-we-do> [accessed 24 January 2019].

<sup>43</sup> For example the European Commission’s Trade for All communication (European Commission 2015b) or the EU Action Plan on Human Rights and Democracy (Council of the European Union 2015).

<sup>44</sup> COM(2016) 739 final; COM(2016) 740 final; SWD(2016) 390 final.

Table III.3.1: Status of Ratifications of International Human Rights Treaties for EU Member States\* and Australia

Treaty	Australia	Austria	Belgium	Bulgaria	Cyprus	Croatia	Czech Republic	Denmark	Estonia	Finland	France	Germany	Greece	Hungary	Ireland	Italy	Latvia	Lithuania	Luxembourg	Malta	Netherlands	Poland	Portugal	Romania	Slovakia	Slovenia	Spain	Sweden	United Kingdom**
CAT	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CAT	✓	✓	s	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	s	✓		✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓
ICCPR	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ICCPR-OP1	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
ICCPR-OP2	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
CPED		✓	✓	s	s	s	✓	s		s	✓	✓	✓		s	✓		✓	s	✓	✓	s	✓	s	✓	s	✓	s	
CEDAW	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CEDAW	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓	✓	✓		✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓
ICERD	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ICESCR	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
ICESCR-OP			✓							✓	✓				s	✓			✓		s		✓		✓	s	✓		
ICMW																													
CRC	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CRC-AC	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CRC-SC	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	s	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CRC-IC		S	✓		✓	✓	✓	✓		✓	✓	✓			✓	✓		s	✓	S		s	✓	s	✓	s	✓		
CRPD	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
OP-CRPD	✓	✓	✓	s	✓	✓	s	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓		✓	s	✓	✓	✓	✓	✓	✓

\* (✓) means state party, (s) means signatory party, (blank space) means no action.

\*\*subject to procedure of the UK withdrawal but still a member state at the moment of writing of the report.

Source: Author's compilation based on the OHCHR Dashboard of ratifications ([www.indicators.ohchr.org](http://www.indicators.ohchr.org))



Table III.3.2: Status of Ratifications of ILO Conventions for the EU Member States \* and Australia

Treaty	Australia	Austria	Belgium	Bulgaria	Cyprus	Croatia	Czech Republic	Denmark	Estonia	Finland	France	Germany	Greece	Hungary	Ireland	Italy	Latvia	Lithuania	Luxembourg	Malta	Netherlands	Poland	Portugal	Romania	Slovakia	Slovenia	Spain	Sweden	United Kingdom**
C029	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
C087	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
C098	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
C100	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
C105	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
C111	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
C138		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
C182	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
C169								✓													✓						✓		

\* (✓) means state party, (blank space) means no action.

\*\*subject to procedure of the UK withdrawal but still a member state at the moment of writing of the report.

Source: Author's compilation based on ILO NORMLEX – Information System on International Labour Standards ([www.ilo.org](http://www.ilo.org))

All EU member states are parties to several international human rights instruments and have human rights obligations. They have different records with respect to ratification of international human rights treaties (see Table III.3.1 below for a full overview), but they are all bound by the human rights values enshrined in the Charter. All the member states ratified all the core ILO Conventions (see Table III.3.2).

### ***Human rights situation and trends***

Based on the 2018 Freedom House Democracy Index, the ranking scores of the states of the European Union with respect to democracy vary from 72 to 100 out of 100 (Freedom House, 2018). The scores of the 2018 Corruption Perception Index of Transparency International for the EU states range from very high (88 for Denmark) to relatively low (42 for Bulgaria) (Transparency International, 2018). The 2017 Human Development Index (HDI) ranks most EU member states as having very high levels of human development.<sup>45</sup>

Since EU member states have not followed homogenous development paths before becoming members of the EU, some states have more human rights issues than others. The 2019 Human Rights Watch (HRW) World Report noted that in 2018, despite a decrease in migration flows to Europe, rights of migrants and asylum seekers continue to be compromised by some EU member states, and main issues remain with respect to discrimination against women, Roma people and LGBTI persons. At the same time, HRW praised the European Union for remaining a leading actor in promoting human rights globally and welcomed the commitment of the EU institutions in their action to address attacks on democratic institutions and rule of law in Hungary and Poland in 2018 (Human Rights Watch, 2019). Discrimination against women, national minorities, migrants, inequality, rights of older people, impact of the misuse of anti-terror legislation on freedom of expression have been on the agenda of the Council of Europe's Commissioner for Human rights in 2018.<sup>46</sup> European Union Agency for Fundamental Rights raised human rights issues with respect to discrimination and unequal treatment in general, rights of asylum seekers, immigrants and minority ethnic groups, Roma integration, children's rights, violence against women and domestic violence (FRA, 2018). Many of these issues are of domestic character and are not likely to be directly related to trade relations with Australia. However, the current situation is important in order to assess human rights impacts, particularly, the degree of the impact, while considering existing sensitivities and issues of vulnerability.

Overall, the human rights situation in the EU can be characterized by several issues that need attention, but, at the same time, it demonstrates that there are constant developments in the field of human rights to improve human rights record and performance of the EU member states. There are various institutions that point out shortcomings and elaborate recommendations on constant improvement of human rights situations in the EU. As such, overall, human rights developments are not likely to be directly linked to trade relations with Australia. However, depending on the exact provisions of the proposed Agreement, there may be impacts that may potentially affect human rights situation in the EU at certain sector level or disproportionately affecting specific vulnerable groups. To this end, we will seek for further evidence on the identified issues and whether they are likely to be affected by the proposed EU-Australia trade relationship. At a later stage of the study, these findings will be verified and fine-tuned in line with the inputs from the modelling results and stakeholder consultations (adding edge and most up-to-date information with respect to the existing issues of vulnerability).

### **Current human rights situation in Australia**

#### ***Human rights framework***

Australia is party to seven out of nine core international human rights treaties and seven out of eight core ILO Conventions (see Tables IV.1 and IV.2 in Annex IV for an overview),

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<sup>45</sup> HDI ranking is ranging from 4 to 51, with Bulgaria and Croatia being the only two states characterised as a states with a "high" rather than "very high" level of human development (UNDP, 2017).

<sup>46</sup> See website of the Council of Europe's Commissioner for Human Rights at <https://www.coe.int/en/web/commissioner/blog-2018> [accessed 24 January 2019]

and has human rights obligations established in these instruments. It did not ratify International Convention on the Protection of the Rights of All Migrant Workers and Members of Their Families (ICRMW) and the International Convention for the Protection of All Persons from Enforced Disappearance (ICPED), Optional Protocol to the International Covenant on Economic, Social and Cultural Rights (OP-ICESCR) and Optional Protocol to the Convention on the Rights of the Child on a communications procedure (OP-CRC-CI), ILO Convention No. 138 on minimum age requirements for admission to employment, ILO Convention No. 169 on the rights of indigenous peoples.<sup>47</sup>

In Australia human rights are recognized and protected through a range of laws at federal and state and territory levels, the Australian Constitution and common law. Overall, at the federal level, Australia has a limited legislative protection of human rights (LSE, 2017). Since, historically, the proposal for the Bill of Rights to be adopted into the Australian Constitution was defeated in 1890s, Constitution contains only a few references to human rights protection (United Nations, 2017). There are five explicit individual rights mentioned there – right to vote, protection against acquisition of property on unjust terms, the right to a trial by jury, freedom of religion and prohibition of discrimination based on the State of residency. Each of the states and two territories in Australia has its own parliament, government and legislation. The Australian Capital Territory and Victoria are the only Australian states or territories that have their own Bills of Rights. Common law system provides strong protections for such rights as freedom of speech, opinion, religion, association and movement. Certain shortcomings in human rights protection in Australia pointed out by the UN treaty monitoring bodies (United Nations, 2000, 2017, 2018) as well as national issues with respect to the implementation of human rights in Australia (Galligan, 1994; Galligan & Larking, 2007) have raised the question of possible re-thinking of the legal framework on human rights in Australia and adopting a Bill of Rights (proposed for adoption in 2017) to create mechanisms of statutory protection necessary to ensure adequate human rights protection of the Australian citizens.

Despite some of the shortcomings, overall, Australia is considered as a strong advocate for human rights. It has an elaborate court system that allows its citizens seek justice with respect to human rights violations in common courts, and it plays an active role internationally through development assistance.<sup>48</sup> Australian Human Rights Commission is an independent national human rights institution with statutory organization that reports to the federal Parliament through the Attorney-General. Its statutory responsibilities include education and public awareness, discrimination and human rights complaints, human rights compliance and policy and legislative development.<sup>49</sup> Its independence has been reported as being at risk due to financial cuts from the public funds and its growing dependence on the fundraising and support of private entities, but it remains an important institution in human rights protection (United Nations, 2018). The Parliamentary Joint Committee on Human Rights is set up in line with the Human Rights (Parliamentary Scrutiny) Act 2011 to examine all bills and legislative instruments for compatibility with the seven core human rights treaties to which Australia is a party and to report to Parliament on its findings.<sup>50</sup>

As mentioned in ex-ante study (LSE, 2017), Australia does not include human rights as such in the trade agenda, except for the rights of indigenous peoples that were included in previous trade agreements. So, it will be interesting to see how this issue will be addressed in the proposed Agreement with the EU, the leading promoter of human rights in

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<sup>47</sup> For detailed description of treaty ratifications and reservations expressed, see ex-ante study (LSE, 2017).

<sup>48</sup> Website of the Department of Foreign Affairs and Trade in Australia, <https://dfat.gov.au/international-relations/themes/human-rights/Pages/human-rights.aspx> [accessed 18 January 2019].

<sup>49</sup> See website of the Australian Commission on Human Rights, at: <https://www.humanrights.gov.au/about-commission> [accessed 27 January 2019].

<sup>50</sup> See more detailed information on the Committee on the website of the Parliament of Australia at [https://www.aph.gov.au/joint\\_humanrights](https://www.aph.gov.au/joint_humanrights) [accessed 27 January 2019].

international cooperation, having a binding obligation to include human rights essential clause in every trade agreement.<sup>51</sup>

### ***Human Rights situation and trends***

Based on the 2018 Freedom House Democracy Index, Australia enjoys a high level of democracy with the ranking score of 77 out of 100 (Freedom House, 2018). The score of the 2018 Corruption Perception Index of Transparency International for Australia is 77 meaning that levels of corruption are perceived to be relatively low there (Transparency International, 2018). The 2017 Human Development Index (HDI) ranks Australia as having a very high level of human development.<sup>52</sup>

Overall, Australia has a relatively high record on human rights. Main human rights issues relate to the rights of migrants and asylum seekers (Australian Commission for Human Rights, 2017a), discrimination (United Nations 2018, 2017, 2017a, 2017b), rights of indigenous peoples, women's rights, labour rights of migrant workers (Farbenblum & Berg, 2018). Some of the issues related to human rights have already been discussed in the ex-ante study: freedom of expression, right to peaceful assembly and association, right to participate in public and political life, right to health, rights of indigenous peoples, rights of migrants, refugees and asylum seekers, right to a fair hearing and right to privacy. In this section, we will update the state of play and provide a short overview of the issues.

#### ***Right to an adequate standard of living***

In 2016, 13.2 per cent of the Australian population lived in poverty. Population groups vulnerable for poverty included indigenous peoples, single parents, beneficiaries of social security and children.<sup>53</sup> Australian Council for Social Service (ACOSS) reported that almost three million people in Australia live in poverty, including 731,000 children (ACOSS, 2016, 2017).

#### ***Right to work and right to just and favourable working conditions***

Overall, the employment rate has increased, and unemployment declined.<sup>54</sup> Government launched initiatives to facilitate increased participation of disadvantaged groups in the labour market (Department of Jobs and Small Business, 2018a, OECD 2018b). Despite various measures, vulnerable groups remain disproportionately vulnerable to employment: migrant workers, women, youth, persons with disabilities, older persons and indigenous peoples (AHRC, 2016; United Nations, 2017b). According to the OECD findings on the potential change in employment as a result of automation in Australia, 32-33 percent of workers might need to look for another job in the future (OECD, 2017b). Gender pay gap remains a challenge, and it is higher in the private sector (between 17.3 and 22.4 percent), which is attributed to persistent industrial and occupational segregation by sex, and the concentration of women in low-paid sectors and in part-time work.

#### ***Right to the highest attainable standard of physical and mental health***

As noted in the ex-ante study, issues with respect to the right to health particularly refer to how this right is protected for specific vulnerable groups. While overall, Australian citizens enjoy high level of health protection, specific groups are reported to be disproportionately affected – indigenous population living in the rural areas and indigenous population with low income (particularly women, who have difficulty in gaining access to health services and discriminatory treatment by health-care providers and have an average life expectancy at birth that is 9.5 years lower than that of non-indigenous women and children) (LSE, 2017). Increased rate of obesity (28 percent of adult), especially in rural areas and among such vulnerable population groups as indigenous peoples, persons with low income (United Nations, 2017b).

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<sup>51</sup> It will be interesting to see if the EU-Australia FTA will take on the solution from the CETA or other compromises will be reached.

<sup>52</sup> HDI ranking is ranging from 4 to 51, with Bulgaria and Croatia being the only two states characterised as a states with a "high" rather than "very high" level of human development (UNDP, 2017).

<sup>53</sup> See also Section V.2 of the report for more detailed statistical information.

<sup>54</sup> See more detailed statistical data presented in Section V.2 of the report.

### *Right to a clean environment*

Despite Australia's commitments under the UN Framework Convention on Climate Change and the Kyoto Protocol as well as under the Paris Agreement, reported increase of carbon dioxide emissions in the country, in combination with decreased environmental protection in the recent years raise concerns with respect to the right to clean environment. Recent 2019 OECD Environmental Performance Review of Australia noted progress in replacing coal with natural gas and renewables in electricity but points out that Australia remains one of the most carbon-intensive OECD countries and one of the few where greenhouse gas emissions have risen in the past decade.<sup>55</sup> Disproportionate effect of climate change on the enjoyment of human rights by indigenous peoples has been noted by the CESCR (United Nations, 2017b).

### *Rights of specific persons or groups*

#### *Rights of indigenous peoples*

Based on the 2017 Report of the UN Special Rapporteur on the rights of indigenous peoples, despite various actions undertaken by the Government (e.g. "Closing the Gap" strategy in 2008 which had a limited success), several principal issues remain with respect to the rights of indigenous peoples. Racism and racial discrimination of Aboriginal and Torres Strait Islander Peoples, right to self-determination and right to full and effective participation in consultations on key policies and government proposals have been marked as problematic (United Nations, 2013, 2017; 2017e). Next to that, right to health of indigenous peoples, their right to access education, right to housing and right to work (based on employment rates statistics compared to non-indigenous Australian citizens that report that national unemployment rate for Aboriginal and Torres Strait Islander people is 20.8 per cent, compared with the national average of approximately 5-6 per cent) have been compromised. There is high rate of suicide reported among indigenous peoples (United Nations, 2017f).

Data on children removal has shown deterioration with respect to the rights of indigenous children (in 1997, 20 per cent of indigenous children were placed in out-of-home care, while in 2016 this number increased to 36 per cent). High proportion of indigenous children are in contact with criminal justice (2017d).

Indigenous women often face multiple and intersecting forms of discrimination and violence, closely connected to the context of other issues experienced by the indigenous populations (United Nations, 2017; 2018). Incarceration rate of indigenous women is growing while indigenous peoples are already overrepresented in Australian prisons (2017a).

The 2017 CESCR Concluding Observations report that indigenous people living in remote areas remain vulnerable to discrimination in access to social security benefits, particularly through obligatory scheme of income-management (United Nations, 2017b).

The National Congress of Australia's First Peoples as well as other indigenous programmes and organizations providing services to indigenous peoples experienced decrease in funding in recent years which may put many vulnerable groups within the indigenous population group at further disadvantage, e.g. indigenous peoples with disabilities (United Nations, 2017).

Finally, insufficient compliance with the principle of free, prior and informed consent of indigenous peoples, including in the context of extractive and development projects carried out on lands owned or traditionally used by indigenous people.

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<sup>55</sup> See more detailed analysis on greenhouse gas emissions in Section V.4 of the report.

### *Women's rights*

Australian Constitution does not include provisions that guarantee equality between women and men or a general prohibition of discrimination against women. Several legislative acts, however, provide for protection of women's rights. Sex Discrimination Act 1984 prohibits discrimination on grounds of sexual orientation, gender identity and intersex status. The 2011 Amendments to this Act provide for prohibition of direct discrimination against employees based on their family responsibilities and strengthening protection against sexual harassment in the workplace and schools. Workplace Gender Equality Act 2012 is designed to promote and include gender equality at the workplace (United Nations 2018). Australian Government strategy "Towards 2025" adopted in 2017 is aimed to boost the participation of women in the workforce. Several National Action Plans (NAPs) were also adopted to this end: NAP to combat human trafficking and slavery 2014, NAP on women, peace and security 2012, NAP to reduce violence against women and their children 2011 and 2016, National Plan to Reduce Violence against Women and their Children 2010-2022, the Stop the Violence Project. Despite these measures, persistent levels of violence remain and disproportionately affect indigenous women and women with disabilities (United Nations, 2017a). Recent CEDAW observations point out issues that remain with respect to women's rights protection. In particular, gender-based violence against women, participation of women in political and public life, use of trafficking and exploitation of prostitution, sexual harassment (Australian Human Rights Commission, 2018), right to work, and right to education, right to health, right of indigenous women and refugee and asylum-seeking women, as well as women in detention (United Nations, 2018).

### *Children's rights*

Most Australian children enjoy safe and healthy environments necessary for their well-being. However, there are some groups of children whose rights are not adequately protected, which impacts negatively on their well-being and ability to thrive (Australian Human Rights Commission, 2018a). According to the 2018 National Sexual Harassment Survey, sixteen per cent of 15-17-year-olds reported experiencing sexual harassment. 49 percent of refugee and migrant young people had experienced some form of discrimination or unfair treatment in 2016. Children in regional and remote areas face violence. Moreover, many children still suffer from harmful traditional practices (forced marriages, female genital mutilation). Disparity in health status between indigenous children and non-indigenous counterparts remains a crucial human rights issue within Australia (AHRC, 2017).

Australia has not yet ratified the Minimum Age Convention No. 138. National legislation related to child labour is regulated at the state level and currently one of the states, South Australia, doesn't have any legislation which would regulate this matter. Its law only envisages that children under 16 years of age cannot work during school hours, which however does not prevent them from working outside that time. In 2018, the State Government of South Australia announced proposal for a new legislation on child labour (Medianet, 2018).

### *Rights of migrants, refugees and asylum seekers*

Over the last 15 years, Australia made significant improvements with respect to its record on the rights of asylum seekers and refugees, particularly in relation to immigration detention (AHRC, 202017a). However, national legal framework of Australia regarding extradition, transfer or removal of non-citizens still does not provide adequate protection against non-refoulement, one of the most important principles of international humanitarian and human rights law and a fundamental rule of customary international law (AHRC, 2017a; United Nations, 2017a, 2017c). Section 197C of the Migration Act 1958 specifies that unlawful non-citizens can be removed without an assessment of non-refoulement concerns (United Nations, 2017f). Next to that, indefinite detention is allowed with respect to refugees and asylum seekers who have received unfavourable security assessments from the Australian Security Intelligence Organization, without adequate procedural safeguards to meaningfully challenge their detention (United Nations, 2017a, 2017c).

In 2016, there were over 900,000 migrants (11 percent of the labour market) in Australia with a right to work. A survey conducted in 2016 on a sample of short-term migrant workers provided insights in the lower pay and jobs in Australia. 30 percent of respondents claimed to receive pay equalling half minimum wage foreseen for a casual worker, with the lowest pays being in the food services, in fruit and vegetable picking, retail trade and cleaning (Berg and Farbenblum, 2017). To address exploitation of migrant workers in agriculture, there is a call for trade unions and farmers working together to provide monitoring of compliance with employment law and workers' rights and to identify employers who are in breach of the rules. There are also initiatives, such as Fair Farms, a training and certification scheme for growers, certifying those who comply with workers' rights (McCarthy, 2018). The Committee on Economic, Social and Cultural Rights (CESCR) expressed concern about the working conditions of migrant workers (especially those who hold temporary visas) and noted that they receive lower wages and work for longer hours, especially in construction, agriculture and hospitality industries (United Nations, 2017b). While many of them are not aware of their rights and entitlements, others refrain from seeking remedy due to fear of dismissal or deportation which contributes to increased exploitation by employers (United Nations, 2017c; 2017f; Berg & Farbenblum, 2017).

#### *Business and human rights*

There is ongoing consultation process on the implementation of the Guiding Principles on Business and Human Rights.<sup>56</sup> The Multi-Stakeholder Advisory Group (MSAG) on the Implementation of the UN Guiding Principles on Business and Human Rights (UNGPs) was set up in 2017 as a part of the voluntary commitment of the Australian Government to undertake a national consultation on the further implementation of the UNGPs and to advise the government how Australian business can apply human rights considerations into their practices (Human Rights Law Centre, 2018). In 2017, the Ministry of Justice launched public consultations on a proposed model for a Modern Slavery Reporting Requirement requesting large companies to publish annual statements outlining their actions to address modern slavery in their operations and supply chains.<sup>57</sup> A survey, conducted in 2017 and involving 856 companies from Australia, provided information about CSR practices in the private sector and the way of addressing Sustainable Development Goals (ACCSR, 2017).

Despite these various measures, Australian regulatory framework with respect to activities of the companies operating in the country as well as of the companies under its jurisdiction acting abroad, does not provide for legal liability for the companies to ensure that their activities do not negatively impact the enjoyment of human rights or for victim reparations to ensure that companies operating in Australia, as well as companies under its jurisdiction acting abroad, fully respect human rights. Moreover, there is concern that private companies, such as the service providers in the regional processing centres in Nauru and Papua New Guinea, are responsible for serious human rights violations, and about the lack of proper and independent investigation and complaints mechanisms (Business and Human Rights Resource Centre, 2019; United Nations, 2015).

### **III.4 Environmental state of play**

#### ***Climate Change***

**Governance framework** - At national level, the Government of Australia sets climate change policy with the help of a variety of governmental departments (e.g. Department of the Environment and Energy; Department of Industry, Innovation and Science). The main legislative piece of climate action is the Emissions Reduction Fund (ERF)<sup>58</sup>. The ERF seeks to reduce GHG emissions in the economy by crediting and purchasing Australian Carbon Credit Units (ACCUs) to and from businesses. GHG emissions monitoring/reporting

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<sup>56</sup> National Action Plans on Business and Human Rights: <https://globalnaps.org/country/australia/>

<sup>57</sup> <https://www.homeaffairs.gov.au/about/consultations/modern-slavery-supply-chains-reporting-requirement>

<sup>58</sup> Available at: <http://www.environment.gov.au/climate-change/government/emissions-reduction-fund>

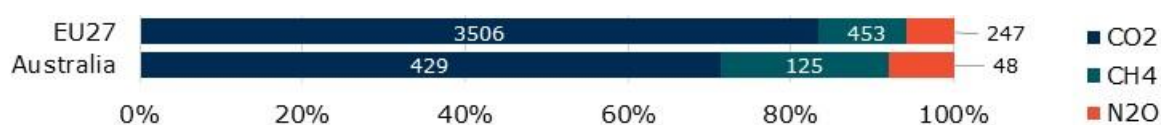


obligations are manifested in the National Greenhouse and Energy Reporting Scheme (NGER)<sup>59</sup>. The scheme is independently and recurrently reviewed by the Climate Change Authority<sup>60</sup>. Both the ERF and the NGER, as well as the country's Renewable Energy Target and the National Registry of Emissions Units (ANREU), are administered by the Clean Energy Regulator<sup>61</sup>. At regional level, States and Territories have drafted and implemented their own climate change policies, often exceeding ambition at national level<sup>62</sup>. Internationally, Australia is a signatory to the Paris Agreement and the Doha Amendment to the Kyoto Protocol. Recent political discord over the implementation of more ambitious climate-relevant legislation led to the collapse of the National Energy Guarantee (NEG) policy proposal, a presidential change, and resulted in increased anti-climate action rhetoric in governmental realms<sup>63</sup>.

**Performance** - Recent data suggests that Australia could still meet its 2020 Nationally Determined Contribution (NDC) target. However, Australia's NDC was one of the five NDC's from industrial countries which was rated as "insufficient to keep global warming below 2 °C" by Climate Action. Mitigation actions should be intensified to meet the country's 2030 NDC target (also rated as insufficient by Climate Action), according to the government and independent estimates (UN Environment, 2017). Australia committed to a 26–28 percent target of greenhouse gas (GHG) emission reductions below 2005 levels by 2030. In comparison, the EU committed to a 40 percent reduction compared to 1990 levels, but also that ambition is judged too low to meet the Paris goal (Mathiesen & Sauer, 2018).

Government projections indicate that emissions are expected to reach 570 Mton CO<sub>2</sub> eq./year in 2030, in contrast to the targeted range of 429–440 Mton CO<sub>2</sub>-eq/year (Australian Government, 2017). In 2012, gross *per capita* GHG emissions were about 3 times higher in Australia than in the EU. Gross total GHG emissions were steadily increasing in Australia between 1980 and 2005 and have since plateaued at around 530 Mton CO<sub>2</sub> eq/year (OECD, 2019). This is due to the fact that increases in most sectors were offset by a significant decline of emissions in the agriculture, forestry and fishing sectors (Australian Bureau of Statistics, 2018). In terms of CO<sub>2</sub>-equivalents<sup>64</sup>, the share of CO<sub>2</sub> in the gross GHG emissions equals 71 percent, CH<sub>4</sub> 21 percent and N<sub>2</sub>O 8 percent, as shown in Figure III.4.1 (Australian Greenhouse Emissions Information System, 2016). In 2012, 49 percent of the CO<sub>2</sub> emissions was caused by public electricity and heat production. Despite the fall in emissions in the agricultural sector, it remains responsible for the majority of the CH<sub>4</sub> (57 percent) and N<sub>2</sub>O (82 percent) emissions in Australia (see Table III.4.1).

Figure III.4.1: Gross GHG emissions in Australia and the EU27 (Mton CO<sub>2</sub>)



<sup>59</sup> Available at: <http://www.cleanenergyregulator.gov.au/NGER>

<sup>60</sup> Available at: <http://climatechangeauthority.gov.au/>

<sup>61</sup> Available at: <http://www.cleanenergyregulator.gov.au/>


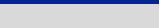
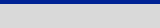
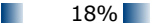


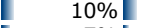


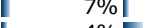


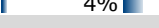


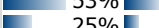
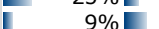
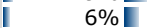
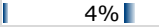

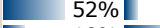
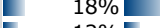
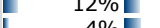
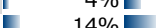
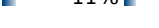

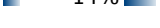
<sup>62</sup> The Australian government seeks to reduce GHG emissions by 26–28% below 2005 levels by 2030. New South Wales and Victoria, on the other hand, have pledged to become carbon neutral by 2050.

<sup>63</sup> Information at: <https://www.theaustralian.com.au/national-affairs/climate/national-energy-guarantee-dead-as-morrison-sets-new-course/news-story/1e0db1f87ba30117317cdcc24f537a88>

<sup>64</sup> A measure to estimate the impact of different GHGs on global warming using the equivalent amount of CO<sub>2</sub> as a reference. The CO<sub>2</sub> equivalence of CH<sub>4</sub> and N<sub>2</sub>O are 25 and 298 respectively.



Table III.4.1: Sector shares in GHG emissions in 2012 in Australia and the EU27

Sector	CO <sub>2</sub>		CH <sub>4</sub>		N <sub>2</sub> O	
	AU	EU	AU	EU	AU	EU
Public electricity and heat production		49%		53%		52%
Road transportation		18%		25%		18%
Manufacturing Industries and Construction		10%		9%		12%
Other Energy Industries		7%		6%		4%
Residential and other sectors		4%		4%		14%
Enteric fermentation				53%		
Fugitive emissions from solid fuels				25%		
Solid waste disposal on land				9%		
Fugitive emissions from oil and gas				6%		
Manure management				4%		
Manure in pasture/range/paddock						52%
Direct soil emissions						18%
Indirect N <sub>2</sub> O from agriculture						12%
Production of chemicals						4%
Other		11%		4%		14%

Source: EDGAR

## Air Quality

**Governance framework** - The Australian framework for the governance of air quality is characterized by strong vertical linkages throughout the three major levels of government (national, state & territory, local). The main body of legislation is the National Environment Protection Council (NEPC)<sup>65</sup> which is led by representatives of the Commonwealth, the states and the territories. It drafts the country's National Environment Protection Measures (NEPMs) that set national (emission) standards, decentralized governance guidelines, and monitoring rules to collect relevant information on pollutants. Four of the NEPMs carry relevance for air quality: Ambient Air Quality, Air Toxics, National Pollutant Inventory, and Diesel Vehicle Emissions. The national government administers standards (fuel quality & vehicle emissions) and keeps inventories, whereas the state & territory governments assume responsibility for actual implementation of the NEPMs via adequate policies in their jurisdictions. Local government authorities provide support by managing air pollution from small-scale polluters<sup>66</sup>. In 2015, the National Clean Air Agreement was signed off by Australia's Environment Ministers, providing detailed action points for standards, emission reduction measures, cooperation and knowledge creation to improve air quality. The Product Emissions Standards Act 2017 was one of the first landmark outputs of the agreement's initial work plan (reviewed biannually).

**Performance** - Australia is ranked as the global leader in overall air quality in the 2018 Environmental Performance Index (EPI, 2019), based on an assessment of hazardous air pollutants (HAPs) from household solid fuels, PM<sub>2.5</sub> average exposure and PM<sub>2.5</sub> exceedance. This high rank is partly due to its small manufacturing sector and large distance between primary production (e.g. mining) and major population centres. The Air Quality Index (AQI) for different airborne pollutants measured in most of Australia's airsheds is currently, and has historically, oscillated between 'good' and 'very good' levels<sup>67</sup>. Performance can temporarily (i.e. 24-hour average) deteriorate to unhealthy concentration levels in Australia due to endemic natural events such as dust storms and bushfires (catalysed by the continent's generally dry climate). Exceedance of the NEPM standards in major metropolitan areas up to 2014 are furthermore presented in the Australia State of the Environment 2016 report (Department of the Environment and Energy, 2017) for different pollutants. PM<sub>10</sub> (50 µg/m<sup>3</sup> 24-hour mean), NO<sub>2</sub>, and SO<sub>2</sub> standards were consistently met, whereas many of the cities surpassed the National Environment Protection Measures (NEPM) standard PM<sub>2.5</sub> (25 µg/m<sup>3</sup> 24-hour mean) and

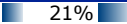
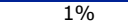

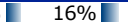
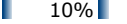
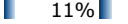
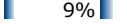

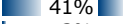
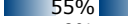
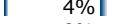

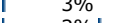
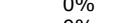
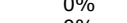
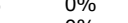
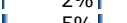
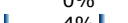
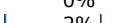
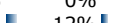
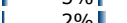
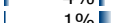
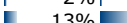
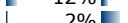
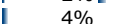
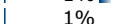

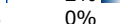
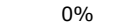
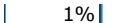
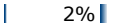
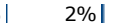

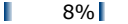
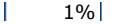
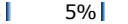
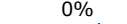
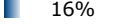
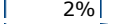
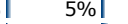
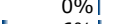
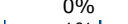
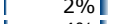
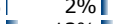
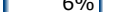
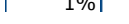
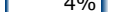
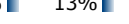




<sup>65</sup> Available at: <http://www.nepc.gov.au/home>

<sup>66</sup> Available at: <https://www.loc.gov/law/help/air-pollution/australia.php>

<sup>67</sup> AQI = pollutant concentration/pollutant standard x 100. Scoring: 0-33 (very good); 34-66 (good); 67-99 (fair); 100-149 (poor); >150 (very poor). More information available at: <https://soe.environment.gov.au/theme/ambient-air-quality/topic/2016/air-quality-index>. Live AQI's can be sourced from: <https://aqicn.org/map/australia/#@g/-35.6872/146.5192/7z>

Ozone (0.08ppm) levels. The National Pollutant Inventory (Department of the Environment and Energy, 2018) provides annual datapoints on nationwide pollution as gathered from industry by sub-national government entities (states & territories). Table III.4.2 exhibits the relative air pollutant emissions per sector in 2012. 41 percent of the NO<sub>x</sub> emissions resulted from public electricity and heat production. The majority (60 percent) of the PM<sub>2.5</sub> emissions was the result of agricultural waste burning. In Australia, this relates mostly to the burning of stubble (base of plants and straw residues) and is mostly common in the cotton, rice, sugarcane and wheat sectors<sup>68</sup>. The manufacturing industries and construction sector contributed most of to the PM<sub>10</sub> emissions of all sectors.

Table III.4.2: Sector shares in air pollutants in 2012 in Australia and the EU27

Sector	NO <sub>x</sub>		SO <sub>2</sub>		PM <sub>2.5</sub>		PM <sub>10</sub>	
	AU	EU	AU	EU	AU	EU	AU	EU
Road transportation		21% 37%		1% 0%		3% 6%		16% 18%
Manufacturing Industries and Construction		10% 12%		11% 12%		9% 13%		35% 19%
Public electricity and heat production		41% 26%		55% 60%		4% 7%		7% 8%
Manure in pasture/range/paddock		3% 0%		0% 0%		0% 0%		0% 0%
Direct soil emissions		2% 4%		0% 0%		0% 0%		0% 0%
Inland navigation		5% 5%		4% 5%		2% 2%		12% 7%
Residential and other sectors		2% 8%		1% 11%		13% 36%		2% 19%
Agricultural waste burning		4% 1%		1% 0%		60% 11%		0% 0%
Production of pulp/paper/food/drink		0% 0%		1% 4%		2% 6%		2% 3%
Other Energy Industries		5% 2%		8% 5%		1% 1%		5% 3%
Production of metals		0% 0%		16% 0%		2% 2%		5% 3%
Manure management		0% 1%		0% 0%		2% 9%		2% 6%
Other		6% 3%		1% 2%		4% 7%		13% 11%

Source: Trinomics based on EDGAR

## Ecosystems & Biodiversity

**Governance Framework** - The national Biodiversity Conservation Strategy 2010-2030 provides a guiding framework and sets priorities for biodiversity conservation in Australia to 2030. A draft revised strategy - *Australia's Strategy for Nature 2018-2030* - was proposed in 2017. Other relevant national strategies include the National Reserve System Strategy 2009-2030 which guides protected area management<sup>69</sup>, the Murray Darling Basin Plan<sup>70</sup> which manages consumptive and environmental use of water in Australia's largest water basin, and the Reef 2050 Plan<sup>71</sup> which targets Great Barrier Reef management. The main piece of biodiversity legislation at national level is the Environment Protection and Biodiversity Conservation Act (EPBC) 1999<sup>72</sup> which protects nationally and internationally-significant plant and animal species. Other relevant legislation includes the Great Barrier Reef Marine Park Acts 1975, State-based national park acts<sup>73</sup>, and the Biosecurity Act 2015 which manages biosecurity risks from marine and terrestrial vectors. Outside protected areas, biodiversity conservation and sustainable use are managed through a range of instruments, such as the National Landcare Program, conservation covenants with private landowners, and biodiversity offset requirements (OECD, 2019). The national ministry responsible for biodiversity is the Department of the Environment and Energy. The Department of Agriculture and Water Resources is responsible, among others, for biosecurity. At international level, Australia is party to the Convention on Biological Diversity (CBD) and the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES).

**Performance** Australia has one of the most diverse collections of plants and animals in the world, containing 7-10 percent of all species on Earth, and very high levels of endemism (CBD). Over 17 percent of Australia's terrestrial area and 36 percent of the marine area

<sup>68</sup> See: <https://www.epa.nsw.gov.au/~media/EPA/Corporate%20Site/resources/air/mod3p3agstubble07268.ashx>

<sup>69</sup> For more details, see: <http://www.environment.gov.au/land/nrs/about-nrs/requirements>

<sup>70</sup> Available at: <https://www.mdba.gov.au/basin-plan/plan-murray-darling-basin>

<sup>71</sup> Available at: <http://www.environment.gov.au/marine/gbr/long-term-sustainability-plan>

<sup>72</sup> Available at: <http://www.environment.gov.au/epbc/about>

<sup>73</sup> Six Commonwealth national parks as well as Marine Parks are governed by the EPBC Act. Remaining national parks are governed at the state government level.

are under some form of protection (Cresswell et al., 2017). Despite this, Australia is reported to have among the highest species loss in the world (Morris, 2018). Knowledge on the state and trends of species is limited due to a lack of effective monitoring and reporting, but the overall status of biodiversity is considered poor and worsening (Cresswell et al., 2017). The most significant current pressures to Australia's biodiversity are clearing, fragmentation and declining quality of habitat; invasive species; climate change; changing fire regimes; grazing; and changed hydrology (ibid.). Most of these factors exert a high to very high pressure on biodiversity and show worsening trends (ibid.). In February 2019, 79 ecological communities were listed as 'threatened' under the Environment Protection and Biodiversity Conservation (EPBC) Act: 34 as 'critically endangered', 43 as 'endangered', and two as 'vulnerable' (Department of the Environment and Energy, 1999a). As regards species status, 458 fauna species and 1318 flora species were listed as 'threatened', while 54 fauna species and 37 flora species are 'extinct' (Department of the Environment and Energy, 1999b). Invasive species are a key, increasing threat at both national and state & territory levels. Yet, data on the distribution and abundance of invasive species, and on the effectiveness of pest management actions is poor (Cresswell et al., 2017).

## **Water Quality & Quantity**

**Governance Framework** - Australian water governance is an integrated process which incorporates partnerships between stakeholders and shared decision-making. The Water Act 2007<sup>74</sup>, The Water Efficiency Labelling and Standards Act 2005<sup>75</sup>, and The Environment Protection and Biodiversity Conservation Act 1999<sup>76</sup> constitute the main governance tools for water issues. Such legislation is drafted by the federal government: Commonwealth departments and authorities (Department of the Environment and Energy, Department of Agriculture and Water Resources, Department of Infrastructure and Regional Development, and the Bureau of Meteorology) are tasked with developing national policy and establishing information systems to support the implementation of policies. In addition to these bodies, the major agricultural area of the Murray Darling River Basin (encompassing the states of Queensland, New South Wales, Victoria and South Australia, and the Australian Capital Territory) has its own authority, which is tasked with the management of water resources. The intergovernmental agreement seeks to ensure sustainable and integrated management of the basin through the establishment of Basin Plans. These plans enact sustainable diversion limits (SDLs), which limit the use of water by industries and communities within the Basin<sup>77</sup>. Basin Plans are prepared by the Murray Darling Basin Authority, territory governments, local communities and ministers from each of the basin states. Such plans are reviewed every 5 years by the Productivity Commission (Governmental advisory body). Water pollution issues are regulated by states and territories through their own legislation. These are duly aligned with nationally drafted policies. States and territories are also tasked with monitoring water quality and use (OECD, 2019). Beyond the Murray Darling River Basin, a joint commitment by all states, territories and national governments exists under the premise of the National Water Initiative (NWI). The NWI manages all urban and rural surface water and groundwater resources through developing innovative ways of managing and obtaining more efficient water usage. Through the NWI, the various levels of Australian government develop and periodically review urban water plans<sup>78</sup>.

**Performance** - With regard to water quantity, inland water storage levels throughout the country vary considerably. Yet, the national water storage levels have dropped from 80 percent capacity in 2011 to 50 percent in 2015 (Commonwealth of Australia, 2016a).

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<sup>74</sup> Available at: <https://www.mdba.gov.au/about-us/governance/water-act>

<sup>75</sup> Available at: <http://www.waterrating.gov.au/about/legislation>

<sup>76</sup> Available at: <http://www.environment.gov.au/biodiversity/legislation>

<sup>77</sup> Available at: <https://www.mdba.gov.au/basin-plan-roll-out/basin-plan/developing-basin-plan>

More information available at:

<http://www.agriculture.gov.au/SiteCollectionDocuments/water/Intergovernmental-Agreement-on-a-national-water-initiative.pdf>

Furthermore, data from sites unaffected by development revealed decreasing streamflow in 35 percent of sites surveyed. The primary consumer of water in Australia is the agricultural sector, accounting for between 50-62 percent of total water consumption (Jackson, 2017). Future rainfall projections show that the frequency and intensity of extreme rainfall events are likely to increase in Northern, Southern, South-Western, South-Eastern regions (Argent, 2017). The inland water quality status throughout Australia is seen as 'poor' in most regions, indicating that water quality has worsened substantially as a result of human activity. Furthermore, ecological processes and key species populations are regarded in 'poor' condition in the Murray Darling River Basin, 'good' to 'stable' in South-Eastern and South-Western regions, and 'good' for the rest of the nation (Commonwealth of Australia, 2016b). Land management practices, agricultural run-off, infrastructure developments, industrial and urban pollution, invasive species and changing climate conditions are all seen as the major pressures on water quality (Argent, 2017). Improving water quality is seen as a priority issue in the Great Barrier Reef catchment area, as high levels of sediment, nutrient and pollutant run-off threaten the ecological health of the area. Improving agricultural practices (e.g. via Best Management Practice systems) are employed to tackle such issues (OECD, 2019). The textbox below contains a case study on the impact of the FTA on water quality through its impact on sugar production.

## ***Land Use & Soil Quality***

**Governance framework** - The highly diverse nature of Australian soil across regions makes for a variety of activities that land is used for. This has, in turn, organically generated a decentralized governance system to manage the land. The six state- and two mainland territory governments are responsible for laws regulating land clearing and economic use of the land (e.g. agricultural, mining, forestry etc.). The regional legislation, however, should be in line with relevant Commonwealth (i.e. national) laws such as the Environment Protection and Biodiversity Conservation (EPBC) Act 1999<sup>79</sup> (binding) or the Native Vegetation Framework<sup>80</sup> (non-binding). The main tool of the national government to drive sustainable land use is the National Landcare Program, which is currently in its second phase (2018-2023)<sup>81</sup>. Together with regional governments, it funds initiatives to combat soil degradation, avoid vegetation loss and to generally improve natural resource management. State and territory governments monitor and report on soil quality to the national government, but a cross-governmental standardized system for assessment (horizontal and vertical) is not yet in place<sup>82</sup>.

**Performance** - Roughly 55 percent of Australian land is currently used for grazing, mainly to fuel the country's large livestock sector (Ministry of the Environment, 2016). Nature conservation areas and indigenous lands comprise a further 23 percent, whereas 15 percent of the land lays almost idle. Urban centres make up only around 0.2 percent of Australia's land cover, as shown in Figure III.4.2 (Metcalf & Bui, 2016). Change of land use has historically been stark, with only 25 percent of the original estimated extent of native vegetation remaining intact (Convention on Biological Diversity, 2012). Native vegetation clearing is a particular challenge in the states of Queensland and New South Wales (due to intensive land conversion for agricultural use). Through inefficient use of nitrogen, agricultural practice has furthermore led to increased soil acidity in major Australian farming regions: 50 percent of the country's agricultural land (roughly 50 million ha) exhibit a pH value that is equal to, or below, 5.5. Of that area, 12 to 24 million ha are estimated to be extremely acidic, with pH levels as low as 4.8. Untreated acidity levels have already led to the more severe 'subsurface acidification', which poses major problems

<sup>79</sup> Available at: <https://www.legislation.gov.au/Details/C2016C00777>

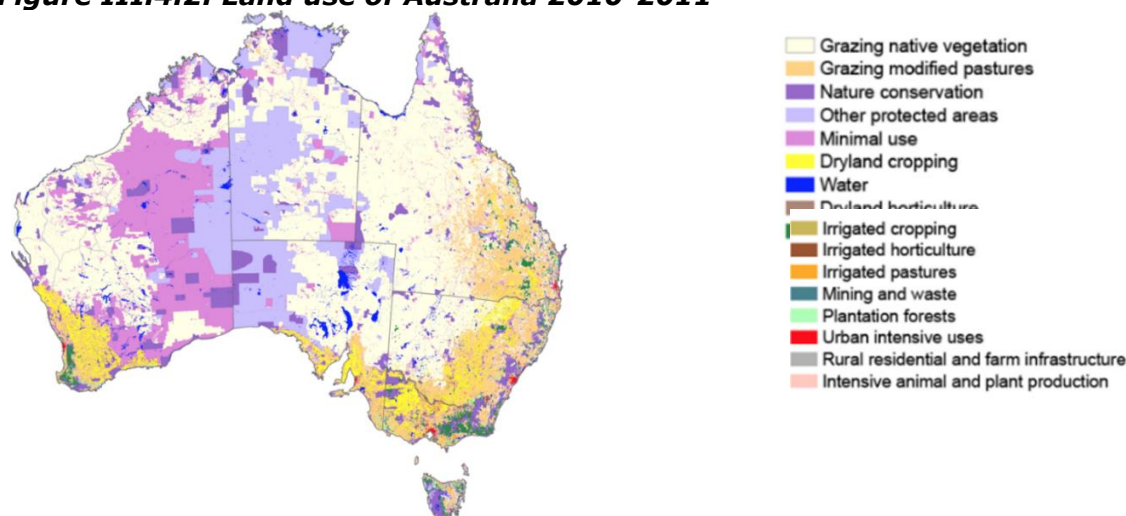
<sup>80</sup> COAG Standing Council on Environment and Water (2012). A National Framework to Guide the Ecologically Sustainable Management of Australia's Native Vegetation. Available at: <http://www.environment.gov.au/system/files/resources/76f709dc-ccb3-4645-a18b-063fbbf0a899/files/native-vegetation-framework.pdf>

<sup>81</sup> More information available at: <http://www.nrm.gov.au/national-landcare-program>

<sup>82</sup> More information available at: <https://soe.environment.gov.au/theme/land/topic/2016/soil-understanding>

for farmers in New South Wales and Western Australia as acidification can drastically decline crop and pasture growth due to lower availability of soil nutrients (Soil Quality, 2019).

**Figure III.4.2: Land use of Australia 2010-2011**



Source: Ministry of the Environment (State of the environment 2016)

## Waste & Waste Management

**Governance framework** - Waste governance in Australia is an inclusive exercise which intensively involves all levels of government, the private sector as well as civil society. The 2018 National Waste Policy is the main Commonwealth policy document, providing strategic direction for both state/territory policies and specific supportive action at community- & business level. Via the National Waste Policy, the government also ensures the country's continued compliance with international waste conventions, such as the Basel Convention<sup>83</sup> and the London Convention<sup>84</sup>. Two legislative vehicles, in the form of National Environment Protection Measures (NEPMs), are further employed by the national government. These focus on Movement of Controlled Waste between States and Territories and Used Packaging Materials. Responsibility for the regulation and management of waste is passed on to state and territory governments<sup>85</sup>. This encompasses a variety of waste activities in their respective jurisdictions such as planning, recycling, transport, storage, treatment and impact management. A number of states have furthermore introduced landfill levies, but structures have not been aligned across jurisdictional borders yet (OECD, 2019). At the lowest level of governance, guided by state/territory regulation, local governments take on execution of specific waste activities through household waste collection, recycling services and operation of landfills. The biannual National Waste Report<sup>86</sup>, commissioned by the Australian Government Department of the Environment and Energy, serves as a reporting tool to continuously inform policy reviews at all levels of government.

**Performance** - Australia generated around 2.7 ton of waste per capita in the time period 2016-2017, which amounted to roughly 67 Mton of total waste in that year (see Figure III.4.3 for a more detailed account). Of that volume, 58 percent was either recycled or recovered (Department of the Environment and Energy, 2018). Being the most populous states, New South Wales, Victoria and Queensland generate the most waste. Solid waste

<sup>83</sup> More info at: <http://www.basel.int/>

<sup>84</sup> Available at: <http://www.imo.org/en/OurWork/Environment/LCLP/Documents/PROTOCOLAmended2006.pdf>

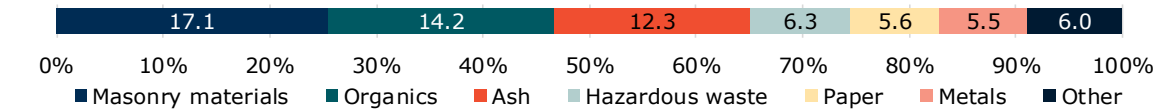
<sup>85</sup> A detailed list of state and territory legislation, policies and governance for waste can be found here: <http://www.environment.gov.au/protection/waste-resource-recovery/national-waste-reports/national-waste-report-2013/policies-and-governance>

<sup>86</sup> Department of the Environment and Energy (2018). National Waste Report 2018. Available at: <http://www.environment.gov.au/system/files/resources/7381c1de-31d0-429b-912c-91a6dbc83af7/files/national-waste-report-2018.pdf>



generation (before recycling and recovery) has grown faster (163 percent) than gross value-added (73 percent) and population (27 percent) between 1997-2014 (Commonwealth of Australia, 2016c). There is hence a need to decouple demographic and economic growth from waste generation. From 2009 onwards, predominance of waste fate options switched from disposal to recycling (Department of the Environment and Energy, 2016). Recycling rates have since improved significantly: the 11-year change (2006-2017) of the share of total waste recycled stands at 26 percent. The highest rates are achieved in South Australia (78 percent) and Victoria (68 percent). Australia generally has high rates of 'kerbside' recycling, with recycling rates comparable to Northern European countries. Still, around 21.7 Mton of total annual waste find their way to a landfill in 2016-2017 (Department of the Environment and Energy, 2018). China's ban on the import of a range of recyclates on 1 January 2018 has revealed that much of Australia's recycling has, in fact, been in the form of export of recyclates for processing in China (Department of the Environment and Energy, 2018). Following the ban, there has, again, been an increase in stockpiling of waste and disposal of waste to landfills.

Figure III.4.3: Waste profile Australia, 2016-2017



Source: Department of Energy and Environment (2018)

## IV. ANNEX IV: QUANTITATIVE RESULTS

### IV.1 Econometric (general equilibrium) modelling results

Table IV.1.1: Impact of the EU-AUS FTA on GDP (%)

Country	Ambitious scenario	Conservative scenario
EU27	0.0	0.0
UK	0.0	0.0
Australia	0.2	0.1
New Zealand	0.5	0.3
Turkey	0.0	0.0
USA	0.0	0.0
Canada	0.0	0.0
Japan	0.0	0.0
Korea	0.0	0.0
EFTA	0.0	0.0
EU FTAS	0.0	0.0
ASEAN	0.0	0.0
ASEAN TPP	0.0	0.0
Vietnam	0.0	0.0
Pacific	-0.1	-0.1
LDC	0.0	0.0
China	0.0	0.0
Hong Kong	0.0	0.0
ROW	0.0	0.0

Source: CGE results provided by DG Trade (2019)

Table IV.1.2: Impact of the EU-AUS FTA on value of GDP

Country	Ambitious scenario	Conservative scenario
EU27	0.1	0.1
UK	0.1	0.0
Australia	0.0	0.0
New Zealand	0.6	0.3
Turkey	0.0	0.0
USA	0.0	0.0
Canada	0.0	0.0
Japan	0.0	0.0
Korea	-0.1	-0.1
EFTA	0.0	0.0
EU FTAS	0.0	0.0
ASEAN	-0.1	0.0
ASEAN TPP	0.0	0.0
Vietnam	0.0	0.0
Pacific	-0.3	-0.1
LDC	0.0	0.0
China	0.0	0.0
Hong Kong	0.0	0.0
ROW	0.0	0.0

Source: CGE results provided by DG Trade (2019)

Table IV.1.3: Impact of the EU-AUS FTA on overall welfare (€ millions)

Country	Ambitious scenario	Conservative scenario
EU27	4086	2176
UK	961	444
Australia	1371	875
New Zealand	567	381
Turkey	6,7	-1,9
USA	-445	-232
Canada	-7	-5
Japan	-217	-206
Korea	-418	-305
EFTA	-55	-18
EU FTAS	-203	-120
ASEAN	-752	-380
ASEAN TPP	-88	-32
Vietnam	-20	-16
Pacific	-83	-39
LDC	-47	-26
China	-894	-377
Hong Kong	40	12
ROW	-1157	-668

Source: CGE results provided by DG Trade (2019)

Table IV.1.4: Impact of the EU-AUS FTA on carbon dioxide emissions (%)

Country	Ambitious scenario	Conservative scenario
EU27	0.1	0.0
UK	0.0	0.0
Australia	0.3	0.1
New Zealand	0.6	0.3
Turkey	0.0	0.0
USA	0.0	0.0
Canada	0.0	0.0
Japan	0.0	0.0
Korea	0.0	0.0
EFTA	0.0	0.0
EU FTAS	0.0	0.0
ASEAN	0.0	0.0
ASEAN TPP	0.0	0.0
Vietnam	0.0	0.0
Pacific	-0.2	-0.1
LDC	0.0	0.0
China	0.0	0.0
Hong Kong	0.0	0.0
ROW	0.0	0.0

Source: CGE results provided by DG Trade (2019)



Table IV.1.5: Impact of the EU-AUS FTA on respective carbon dioxide emissions (%)

CGO2	EU 27	UK	AUS	NZ	TK	USA	CAN	JP	KOR	EFTA	EU FTAs	ASEAN	ASEAN TPP	VT	Pacific	LDC	China	HK	ROW
<b>Ambitious Scenario</b>																			
Coal	0.0	0.1	0.2	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.4	0.0	0.0	0.0	0.0
Oil	0.0	0.6	0.2	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	-0.1	0.0	-0.3	0.0	0.0	0.0	0.0
Gas	0.1	-0.1	0.9	0.3	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	-0.2	0.0	0.1	0.0	0.0
Oil pct	0.0	0.1	0.2	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.2	0.0	0.0	0.0	0.0
<b>Conservative Scenario</b>																			
Coal	0.0	0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.2	0.0	0.0	0.0	0.0
Oil	0.0	0.0	0.2	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Gas	0.0	0.0	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Oil pct	0.0	0.0	0.1	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0

Source: CGE results provided by DG Trade (2019)

Table IV.1.6: Impact of the EU-AUS FTA on real wages (%)

	EU 27	UK	AUS	NZ	TK	USA	CAN	JP	KOR	EFTA	EU FTAs	ASEAN	ASEAN TPP	VT	Pacific	LDC	China	HK	ROW
<b>Ambitious Scenario</b>																			
Land	-0.4	-0.9	1.5	1.8	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0
UnskLab	0.0	0.1	0.3	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.2	0.0	0.0	0.0	0.0
SkLab	0.0	0.1	0.3	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.2	0.0	0.0	0.0	0.0
Capital	0.0	0.0	-0.1	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NatlRes	-0.1	0.1	0.2	2.1	0.0	0.0	-0.1	0.0	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	0.0	-0.2	0.0	-0.1	0.0
<b>Conservative Scenario</b>																			
Land	-0.1	0.0	0.5	1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0
UnskLab	0.0	0.0	0.2	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
SkLab	0.0	0.0	0.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Capital	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NatlRes	-0.1	-0.1	0.3	1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0

Source: CGE results provided by DG Trade (2019)

Table IV.1.7: Impact of the EU-AUS FTA on the CPI (%)

Country	Ambitious scenario	Conservative scenario
EU27	0.1	0.0
UK	0.1	0.0
Australia	-0.1	-0.1
New Zealand	0.1	0.0
Turkey	0.0	0.0
USA	0.0	0.0
Canada	0.0	0.0
Japan	0.0	0.0
Korea	0.0	0.0
EFTA	0.0	0.0
EU FTAS	0.0	0.0
ASEAN	0.0	0.0
ASEAN TPP	0.0	0.0
Vietnam	0.0	0.0
Pacific	-0.1	0.0
LDC	0.0	0.0
China	0.0	0.0
Hong Kong	0.0	0.0
ROW	0.0	0.0

Source: CGE results provided by DG Trade (2019)

Table IV.1.8: Impact of the EU-AUS FTA on volume of exports (%)

Country	Ambitious scenario	Conservative scenario
EU27	0.1	0.0
UK	0.2	0.1
Australia	0.8	0.4
New Zealand	0.7	0.4
Turkey	0.0	0.0
USA	0.0	0.0
Canada	0.0	0.0
Japan	0.0	0.0
Korea	0.0	0.0
EFTA	0.0	0.0
EU FTAS	0.0	0.0
ASEAN	0.0	0.0
ASEAN TPP	0.0	0.0
Vietnam	0.0	0.0
Pacific	-0.2	-0.1
LDC	0.0	0.0
China	0.0	0.0
Hong Kong	0.0	0.0
ROW	0.0	0.0

Source: CGE results provided by DG Trade (2019)

Table IV.1.9: Impact of the EU-AUS FTA on value of exports (%)

Country	Ambitious scenario	Conservative scenario
EU27	0.1	0.1
UK	0.3	0.1
Australia	0.7	0.4
New Zealand	1.1	0.5
Turkey	0.0	0.0
USA	0.0	0.0
Canada	0.0	0.0
Japan	0.0	0.0
Korea	0.0	0.0
EFTA	0.0	0.0
EU FTAS	0.0	0.0
ASEAN	0.0	0.0
ASEAN TPP	0.0	0.0
Vietnam	0.0	0.0
Pacific	-0.3	-0.1
LDC	0.0	0.0
China	0.0	0.0
Hong Kong	0.0	0.0
ROW	0.0	0.0

Source: CGE results provided by DG Trade (2019)

Table IV.1.10: Impact of the EU-AUS FTA on volume of imports (%)

Country	Ambitious scenario	Conservative scenario
EU27	0.1	0.1
UK	0.2	0.1
Australia	0.9	0.5
New Zealand	2.0	0.9
Turkey	0.0	0.0
USA	0.0	0.0
Canada	0.0	0.0
Japan	-0.1	0.0
Korea	-0.1	-0.1
EFTA	-0.1	0.0
EU FTAS	0.0	0.0
ASEAN	-0.1	0.0
ASEAN TPP	0.0	0.0
Vietnam	0.0	0.0
Pacific	-0.4	-0.2
LDC	0.0	0.0
China	-0.1	0.0
Hong Kong	0.0	0.0
ROW	0.0	0.0

Source: CGE results provided by DG Trade (2019)

Table IV.1.11: Impact of the EU-AUS FTA on value of imports (%)

Country	Ambitious scenario	Conservative scenario
EU27	0.1	0.1
UK	0.3	0.1
Australia	1.0	0.5
New Zealand	2.0	0.9
Turkey	0.0	0.0
USA	0.0	0.0
Canada	0.0	0.0
Japan	-0.1	0.0
Korea	-0.1	-0.1
EFTA	0.0	0.0
EU FTAS	0.0	0.0
ASEAN	-0.1	0.0
ASEAN TPP	-0.1	0.0
Vietnam	0.0	0.0
Pacific	-0.4	-0.2
LDC	0.0	0.0
China	-0.1	0.0
Hong Kong	0.0	0.0
ROW	0.0	0.0

Source: CGE results provided by DG Trade (2019)

Table IV.1.12: Impact of the EU-AUS FTA on EU sector employment under the ambitious scenario (%)

Sector	Land	Unskilled Labour	Skilled Labour	Capital	Natural Resources
Rice	0.1	-0.2	-0.2	-0.1	0.0
Cereals	0.0	-0.1	-0.1	-0.2	0.0
Vegetables and fruit	-0.1	-0.2	-0.2	-0.2	0.0
Oilseeds	0.1	-0.2	-0.2	-0.1	0.0
Sugar	0.1	-0.2	-0.2	-0.2	0.0
Fiber crop	0.0	-0.1	-0.1	-0.1	0.0
Bovine meat	-0.6	-1.5	-1.5	-1.4	0.0
Other animal products	0.1	0.0	0.0	0.0	0.0
Other meat	0.2	0.0	0.0	0.0	0.0
Dairy	0.1	-0.1	-0.1	-0.1	0.0
Wood and paper	0.2	0.0	0.0	0.0	0.0
Fishing	0.0	0.0	0.0	0.0	0.0
Coal	0.3	-0.2	-0.2	-0.1	0.0
Oil	0.1	-0.1	-0.1	-0.1	0.0
Gas	0.4	0.4	0.4	0.4	0.0
Minerals	0.0	0.0	0.0	0.0	0.0
Other food	0.2	0.0	0.0	0.0	0.0
Beverages & tobacco	0.2	0.0	0.0	0.0	0.0
Textiles	0.2	0.0	0.0	0.0	0.0
Chemicals	0.2	0.0	0.0	0.0	0.0
Oil products	0.2	-0.1	-0.1	0.0	0.0
Metal products	0.3	0.0	0.0	0.0	0.0
Non metal products	0.3	0.0	0.0	0.1	0.0
Motor vehicles	0.4	0.3	0.3	0.3	0.0
Machinery	0.3	0.1	0.1	0.2	0.0
Elect. machinery	0.2	-0.1	-0.1	-0.1	0.0
Electricity	0.2	0.0	0.0	0.0	0.0
Utilities	0.3	0.0	0.0	0.1	0.0
Transport services	0.3	-0.1	-0.1	0.0	0.0
Comm services	0.3	0.0	0.0	0.0	0.0
Financial services	0.2	0.0	0.0	0.0	0.0
Other services	0.3	0.0	0.0	0.0	0.0
CGDS	0.2	0.0	0.0	0.1	0.0

Source: CGE results provided by DG Trade (2019)

Table IV.1.13: Impact of the EU-AUS FTA on EU sector employment under the conservative scenario (%)

Sector	Land	Unskilled Labour	Skilled Labour	Capital	Natural Resources
Rice	0.0	-0.1	-0.1	0.0	0.0
Cereals	0.0	0.0	0.0	0.0	0.0
Vegetables and fruit	-0.1	-0.2	-0.2	-0.2	0.0
Oilseeds	0.0	-0.1	-0.1	-0.1	0.0
Sugar	0.1	0.0	0.0	0.0	0.0
Fiber crop	0.0	0.0	0.0	0.0	0.0
Bovine meat	0.2	0.2	0.2	0.3	0.0
Other animal products	0.0	0.0	0.0	0.0	0.0
Other meat	0.1	0.0	0.0	0.0	0.0
Dairy	0.1	0.1	0.1	0.1	0.0
Wood and paper	0.1	0.0	0.0	0.0	0.0
Fishing	0.0	0.0	0.0	0.0	0.0
Coal	0.1	-0.1	-0.1	-0.1	0.0
Oil	0.0	-0.1	-0.1	-0.1	0.0
Gas	0.0	-0.1	-0.1	-0.1	0.0
Minerals	0.0	0.0	0.0	0.0	0.0
Other food	0.1	0.0	0.0	0.0	0.0
Beverages & tobacco	0.1	0.0	0.0	0.0	0.0
Textiles	0.1	0.0	0.0	0.0	0.0
Chemicals	0.1	-0.1	0.0	0.0	0.0
Oil products	0.1	0.0	0.0	0.0	0.0
Metal products	0.1	0.0	0.0	0.0	0.0
Non metal products	0.1	0.0	0.0	0.0	0.0
Motor vehicles	0.2	0.2	0.2	0.2	0.0
Machinery	0.1	0.0	0.0	0.0	0.0
Elect. machinery	0.0	-0.1	-0.1	-0.1	0.0
Electricity	0.1	0.0	0.0	0.0	0.0
Utilities	0.1	0.0	0.0	0.0	0.0
Transport services	0.1	0.0	0.0	0.0	0.0
Comm services	0.1	0.0	0.0	0.0	0.0
Financial services	0.1	0.0	0.0	0.0	0.0
Other services	0.1	0.0	0.0	0.0	0.0
CGDS	0.1	0.0	0.0	0.0	0.0

Source: CGE results provided by DG Trade (2019)

Table IV.1.14: Impact of the EU-AUS FTA on Australian sector employment under the ambitious scenario (%)

Sector	Land	Unskilled Labour	Skilled Labour	Capital	Natural Resources
Rice	-0.5	0.2	0.3	0.6	0.0
Cereals	-0.3	-0.1	-0.1	0.0	0.0
Vegetables and fruit	-0.1	0.1	0.2	0.2	0.0
Oilseeds	0.1	0.6	0.7	0.8	0.0
Sugar	-0.2	0.7	0.8	1.1	0.0
Fiber crop	-0.5	-0.3	-0.3	-0.2	0.0
Bovine meat	2.8	5.0	5.0	5.2	0.0
Other animal products	-0.2	0.1	0.1	0.2	0.0
Other meat	-0.8	-0.3	-0.2	0.2	0.0
Dairy	-0.6	-0.1	-0.1	0.2	0.0
Wood and paper	-0.8	-0.2	-0.2	0.2	0.0
Fishing	-0.1	0.1	0.1	0.2	0.0
Coal	-1.0	-0.3	-0.1	1.1	0.0
Oil	-0.1	0.3	0.3	0.4	0.0
Gas	-1.3	-1.5	-1.4	-1.0	0.0
Minerals	-0.2	0.0	0.0	0.1	0.0
Other food	-0.7	-0.2	-0.1	0.3	0.0
Beverages & tobacco	-0.5	0.2	0.3	0.7	0.0
Textiles	-0.8	-0.4	-0.3	0.1	0.0
Chemicals	-1.0	-0.8	-0.7	-0.3	0.0
Oil products	-0.7	-0.1	0.0	0.3	0.0
Metal products	-0.8	-0.3	-0.2	0.2	0.0
Non metal products	-0.8	-0.4	-0.3	0.1	0.0
Motor vehicles	-1.5	-2.0	-1.9	-1.5	0.0
Machinery	-1.7	-2.4	-2.3	-1.9	0.0
Elect. machinery	-0.7	-0.2	-0.1	0.4	0.0
Electricity	-0.8	-0.2	-0.1	0.3	0.0
Utilities	-0.5	0.5	0.6	1.1	0.0
Transport services	-0.8	-0.2	-0.1	0.4	0.0
Comm services	-0.7	0.0	0.1	0.5	0.0
Financial services	-0.7	-0.1	0.0	0.4	0.0
Other services	-0.8	-0.2	-0.1	0.4	0.0
CGDS	-0.3	0.6	0.7	0.8	0.0

Source: CGE results provided by DG Trade (2019)

Table IV.1.15: Impact of the EU-AUS FTA on Australian sector employment under the conservative scenario (%)

Sector	Land	Unskilled Labour	Skilled Labour	Capital	Natural Resources
Rice	-0.1	0.1	0.1	0.2	0.0
Cereals	-0.1	0.0	0.0	0.0	0.0
Vegetables and fruit	0.2	0.3	0.3	0.3	0.0
Oilseeds	0.3	0.5	0.5	0.6	0.0
Sugar	-0.1	0.0	0.0	0.2	0.0
Fiber crop	0.0	0.0	0.0	0.1	0.0
Bovine meat	0.0	0.1	0.1	0.2	0.0
Other animal products	0.2	0.3	0.3	0.3	0.0
Other meat	-0.2	-0.1	0.0	0.2	0.0
Dairy	-0.3	-0.4	-0.3	-0.2	0.0
Wood and paper	-0.3	-0.2	-0.2	0.0	0.0
Fishing	0.0	0.1	0.1	0.1	0.0
Coal	-0.2	0.0	0.1	0.7	0.0
Oil	0.1	0.2	0.2	0.3	0.0
Gas	0.0	0.2	0.3	0.5	0.0
Minerals	0.0	0.0	0.0	0.1	0.0
Other food	-0.2	-0.1	-0.1	0.1	0.0
Beverages & tobacco	0.0	0.3	0.4	0.6	0.0
Textiles	-0.1	0.2	0.3	0.5	0.0
Chemicals	-0.2	-0.1	0.0	0.2	0.0
Oil products	-0.2	0.0	0.0	0.1	0.0
Metal products	-0.2	0.0	0.0	0.2	0.0
Non metal products	-0.2	-0.1	0.0	0.2	0.0
Motor vehicles	-0.8	-1.5	-1.4	-1.2	0.0
Machinery	-0.4	-0.5	-0.4	-0.2	0.0
Elect. machinery	-0.1	0.2	0.3	0.5	0.0
Electricity	-0.2	0.0	0.0	0.2	0.0
Utilities	-0.1	0.3	0.3	0.6	0.0
Transport services	-0.2	-0.1	0.0	0.2	0.0
Comm services	-0.2	0.0	0.0	0.3	0.0
Financial services	-0.2	-0.1	0.0	0.2	0.0
Other services	-0.2	-0.1	0.0	0.2	0.0
CGDS	0.0	0.3	0.3	0.4	0.0

Source: CGE results provided by DG Trade (2019)



Table IV.1.16: Impact of the EU-AUS FTA on sector output under the ambitious scenario (%)

Sector	EU 27	UK	AUS	NZ	TK	US	CAN	JP	KOR	EFTA	EU FTAs	ASEAN	ASEAN TPP	VT	Pacific	LDC	China	HK	ROW
Rice	-0.1	0.0	0.4	-0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.4	0.0	0.0	-0.1	0.0
Cereals	-0.1	-0.1	-0.1	-1.7	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.1	0.1	0.1	0.1	0.0	0.0	0.0	0.0
Vegetables and fruit	-0.2	-0.1	0.1	2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Oilseeds	-0.1	0.0	0.6	-0.9	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sugar	-0.2	-0.4	0.8	-0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.4	0.0	0.0	0.0	0.0
Fiber crop	-0.1	0.0	-0.4	-0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.1	0.0	0.0
Bovine meat	-1.4	-2.5	4.6	4.1	0.0	0.0	0.1	0.1	0.4	0.0	-0.1	0.1	0.1	0.0	0.3	0.0	0.0	0.1	0.0
Other animal products	0.0	0.2	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other meat	0.0	0.4	-0.1	-1.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Dairy	-0.1	-0.1	0.0	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.2	0.1	0.0	0.1	0.0	0.0	0.0
Wood and paper	0.0	0.0	0.0	-0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0
Fishing	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Coal	-0.1	-0.1	0.3	0.2	0.0	0.0	-0.1	0.0	0.0	0.0	0.0	0.0	-0.1	-0.1	-0.1	-0.1	0.0	0.0	0.0
Oil	-0.1	-0.1	0.3	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Gas	0.3	0.8	-0.8	0.3	0.0	-0.1	-0.1	-0.4	0.0	0.0	0.0	-0.2	-0.1	0.0	0.1	-0.1	0.0	-0.1	0.0
Minerals	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other food	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Beverages & tobacco	0.0	0.0	0.5	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Textiles	0.0	0.0	-0.1	-0.2	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.0	-0.3	0.0	0.0	0.0	0.0
Chemicals	0.0	0.1	-0.5	-0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	-0.1	0.0
Oil products	0.0	0.0	0.3	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Metal products	0.0	0.4	0.0	-1.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.1	0.0	-0.1	0.0	-1.1	0.0	0.0	0.0	0.0
Non metal products	0.1	0.1	-0.1	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Motor vehicles	0.3	0.4	-1.8	-2.7	0.1	0.0	0.0	-0.2	-0.4	0.0	0.0	-0.3	0.0	0.0	0.6	0.0	0.0	0.0	0.0
Machinery	0.1	0.4	-2.2	-2.8	0.0	-0.1	-0.1	0.0	0.1	-0.1	-0.1	0.0	-0.1	-0.1	-0.4	0.0	0.0	-0.1	0.0
Elect. machinery	-0.1	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.3	0.0	0.0	0.0	0.0
Electricity	0.0	0.1	0.2	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.2	0.0	0.0	0.0	0.0
Utilities	0.1	0.1	0.6	1.7	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	-0.1	0.0	0.0	-0.4	0.0	0.0	0.0	0.0
Transport services	0.0	0.0	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Comm services	0.0	0.0	0.2	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Financial services	0.0	-0.1	0.1	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	-0.1	0.0	0.0	0.0	0.0
Other services	0.0	0.0	0.1	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0

Source: CGE results provided by DG Trade (2019)

Table IV.1.17: Impact of the EU-AUS FTA on sector output under the conservative scenario (%)

Sector	EU 27	UK	AUS	NZ	TK	US	CAN	JP	KOR	EFTA	EU FTAs	ASEAN	ASEAN TPP	VT	Pacific	LDC	China	HK	ROW
Rice	0.0	0.0	0.2	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.2	0.0	0.0	0.0	0.0
Cereals	0.0	0.0	0.0	-0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Vegetables and fruit	-0.2	-0.2	0.2	2.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Oilseeds	-0.1	-0.1	0.5	-0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sugar	0.0	-0.1	0.1	-0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0
Fiber crop	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Bovine meat	0.2	0.4	0.1	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other animal products	0.0	-0.1	0.2	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other meat	0.0	0.0	0.0	-0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Dairy	0.1	0.1	-0.3	-0.8	0.0	0.0	0.1	0.0	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wood and paper	0.0	0.1	-0.1	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Fishing	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Coal	0.0	0.0	0.2	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Oil	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gas	-0.1	0.0	0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Minerals	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other food	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Beverages & tobacco	0.0	0.0	0.5	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Textiles	0.0	0.0	0.4	0.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.2	0.0	0.0	0.0	0.0
Chemicals	0.0	0.0	0.1	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Oil products	0.0	0.0	0.1	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Metal products	0.0	0.2	0.1	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.4	0.0	0.0	0.0	0.0
Non metal products	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Motor vehicles	0.2	0.3	-1.4	-1.3	0.1	0.0	0.0	-0.1	-0.3	0.0	0.0	-0.2	0.0	0.0	0.3	0.0	0.0	0.0	0.0
Machinery	0.0	0.1	-0.3	-0.6	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Elect. machinery	-0.1	-0.1	0.3	0.4	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Electricity	0.0	0.0	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Utilities	0.0	0.0	0.3	0.7	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Transport services	0.0	0.0	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Comm services	0.0	0.0	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Financial services	0.0	0.0	0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other services	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Source: CGE results provided by DG Trade (2019)

Table IV.1.18: Impact of the EU-AUS FTA on sector CPI under the ambitious scenario (%)

Sector	EU 27	UK	AUS	NZ	TK	USA	CAN	JP	KOR	EFTA	EU FTAs	ASEAN	ASEAN TPP	VT	Pacific	LDC	China	HK	ROW
Rice	0.1	0.0	-0.1	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Cereals	0.0	0.0	0.2	0.2	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.1	0.1	0.2	0.0	0.0	0.0	0.0
Vegetables and fruit	-0.1	-0.1	0.3	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0
Oilseeds	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sugar	0.0	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Fiber crop	0.0	0.0	0.2	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.1	0.0	0.0
Bovine meat	-0.2	-1.4	0.5	0.5	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.1	0.0	0.1	0.0	0.0	0.0	0.0
Other animal products	0.0	-0.1	0.3	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0
Other meat	0.0	0.0	0.0	-0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Dairy	0.0	0.0	-0.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Wood & paper	0.1	0.1	-0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fishing	0.0	0.0	0.2	0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Coal	0.0	0.0	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Oil	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gas	0.1	0.4	-2.0	0.2	0.0	0.0	0.0	-0.1	-0.1	0.1	0.0	-0.1	-0.1	0.0	-0.1	0.0	-0.1	-0.1	0.0
Minerals	0.0	0.0	-0.1	0.8	0.0	0.0	0.0	-0.1	-0.1	0.0	0.0	-0.1	-0.1	0.0	-0.1	0.0	-0.1	0.0	-0.1
Other food	0.0	0.0	-0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Beverages & tobacco	0.0	-0.1	-0.4	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Textiles	0.0	0.0	-0.4	-0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Chemicals	0.0	0.0	-0.6	-0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Oil products	0.0	0.0	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Metal products	0.1	0.1	-0.5	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Non metal products	0.1	0.1	-0.7	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Motor vehicles	0.1	0.1	-1.3	-1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Machinery	0.0	0.0	-1.2	-0.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Elect. machinery	0.0	0.0	-0.2	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Electricity	0.1	0.1	-0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Utilities	0.1	0.1	-0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Transport services	0.0	0.1	-0.2	-0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Comm services	0.1	0.1	-0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Financial services	0.1	0.1	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Other services	0.1	0.1	-0.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0

Source: CGE results provided by DG Trade (2019)

Table IV.1.19: Impact of the EU-AUS FTA on sector CPI under the conservative scenario (%)

Sector	EU 27	UK	AUS	NZ	TK	USA	CAN	JP	KOR	EFTA	EU FTAs	ASEAN	ASEAN TPP	VT	Pacific	LDC	China	HK	ROW
Rice	0.0	0.0	-0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Cereals	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Vegetables and fruit	-0.1	-0.1	0.1	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0
Oilseeds	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sugar	0.0	0.0	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fiber crop	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bovine meat	0.1	0.3	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other animal products	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Other meat	0.0	0.0	0.0	-0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Dairy	0.0	0.0	-0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Wood and paper	0.0	0.0	-0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Fishing	0.0	0.0	0.2	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Coal	0.0	0.0	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Oil	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Gas	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Minerals	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other food	0.0	0.0	-0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Beverages & tobacco	0.0	-0.1	-0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Textiles	0.0	0.0	-0.2	-0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Chemicals	0.0	0.0	-0.2	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Oil products	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Metal products	0.0	0.0	-0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Non metal products	0.0	0.0	-0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Motor vehicles	0.0	0.0	-0.9	-0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Machinery	0.0	0.0	-0.4	-0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Elect. machinery	0.0	0.0	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Electricity	0.0	0.0	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Utilities	0.0	0.0	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Transport services	0.0	0.0	-0.2	-0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Comm services	0.0	0.0	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Financial services	0.0	0.0	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other services	0.0	0.0	-0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0

Source: CGE results provided by DG Trade (2019)

Table IV.1.20: Impact of the EU-AUS FTA on EU sector exports under the ambitious scenario (%)

Sector	EU 27	UK	AUS	NZ	TK	USA	CAN	JP	KOR	EFTA	EU FTAs	ASEAN	ASEAN TPP	VT	Pacific	LDC	China	HK	ROW
Rice	-0.2	-0.7	-0.4	0.1	-0.4	-0.4	-0.4	-0.5	-0.5	-0.3	-0.5	-0.6	-0.5	-0.5	-0.8	-0.4	-0.5	-0.6	-0.4
Cereals	-0.3	-0.1	1.0	2.8	0.1	0.2	0.2	0.3	0.6	0.1	0.2	0.6	0.5	1.0	1.4	0.2	0.4	0.2	0.2
Vegetables and fruit	-0.3	-0.4	8.4	2.4	0.1	0.1	0.1	0.2	0.3	0.1	0.1	0.0	0.1	0.1	1.5	0.1	0.1	0.2	0.1
Oilseeds	-0.2	-0.2	1.0	1.2	-0.2	-0.3	-0.3	-0.3	-0.3	-0.1	-0.3	-0.3	-0.3	-0.3	-0.1	-0.3	-0.3	-0.2	-0.3
Sugar	-0.4	-1.2	0.2	-0.1	-0.3	-0.4	-0.4	-0.5	-0.5	-0.1	-0.4	-0.5	-0.5	-0.5	-0.3	-0.4	-0.4	-0.4	-0.4
Fiber crop	-0.1	-0.2	1.2	3.3	0.1	0.1	0.1	0.1	0.2	0.0	0.1	0.2	0.0	0.1	0.7	0.1	0.5	0.1	0.0
Bovine meat	-3.4	-19.6	2.5	4.2	0.1	0.4	0.2	0.8	1.6	0.1	-0.1	1.1	0.9	0.0	1.9	0.0	0.5	0.3	0.1
Other animal products	-0.1	-0.3	3.2	0.6	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.1	0.0	0.0
Other meat	0.0	-0.2	1.1	30.4	-0.2	-0.2	-0.2	-0.2	-0.2	-0.1	-0.2	-0.2	-0.2	-0.2	-0.1	-0.1	-0.2	-0.2	-0.2
Dairy	-0.6	-0.5	48.6	29.4	0.1	-0.1	-0.1	-0.2	-0.3	-0.1	-0.2	0.0	0.3	0.2	0.7	0.1	0.3	-0.2	0.0
Wood and paper	-0.1	-0.1	21.3	4.1	-0.3	-0.5	-0.5	-0.5	-0.5	-0.2	-0.5	-0.5	-0.5	-0.5	-0.7	-0.4	-0.5	-0.5	-0.4
Fishing	0.0	-0.1	5.1	1.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	-0.1	0.0	0.0	0.0	0.0	0.1	0.0
Coal	-0.3	-0.2	96.3	96.2	-0.5	-0.4	-0.4	-0.7	-0.6	-0.3	-0.5	-0.6	-0.6	-0.6	-1.1	-0.4	-0.5	-0.6	-0.5
Oil	-0.2	0.0	14.9	14.0	-0.2	-0.2	-0.2	-0.2	-0.3	-0.2	-0.2	-0.3	-0.3	-0.3	-0.3	-0.2	-0.3	-0.4	-0.2
Gas	-4.0	-2.7	3572.8	2611.8	-5.1	-5.1	-5.2	-7.1	-6.9	-2.9	-5.5	-8.1	-7.2	-5.0	-5.8	-5.3	-5.4	-6.3	-5.2
Minerals	0.0	0.1	8.0	9.8	-0.0	-0.1	0.0	-0.1	-0.1	-0.1	-0.1	-0.2	-0.1	-0.1	-1.0	0.0	-0.1	0.0	-0.1
Other food	-0.1	-0.1	11.2	12.5	-0.1	-0.2	-0.2	-0.2	-0.2	-0.1	-0.2	-0.3	-0.2	-0.2	-0.2	-0.1	-0.2	-0.2	-0.2
Beverages & tobacco	-0.1	-0.8	6.7	6.0	-0.1	-0.1	-0.1	-0.1	-0.2	-0.1	-0.1	-0.2	-0.1	-0.1	-0.2	-0.1	-0.1	-0.1	-0.1
Textiles	-0.3	-0.2	103.4	101.1	-0.4	-0.5	-0.5	-0.5	-0.5	-0.3	-0.5	-0.5	-0.5	-0.5	-0.8	-0.5	-0.5	-0.5	-0.5
Chemicals	-0.1	-0.1	20.3	26.5	-0.3	-0.4	-0.4	-0.4	-0.5	-0.1	-0.4	-0.5	-0.5	-0.5	-0.7	-0.4	-0.5	-0.4	-0.4
Oil products	0.0	0.1	4.3	8.2	-0.1	-0.1	-0.1	-0.1	-0.1	0.0	-0.1	-0.1	-0.1	-0.1	-0.3	-0.1	-0.1	-0.1	-0.1
Metal products	-0.1	0.0	54.1	52.0	-0.4	-0.5	-0.5	-0.6	-0.7	-0.4	-0.6	-0.7	-0.6	-0.6	-1.4	-0.5	-0.6	-0.6	-0.5
Non metal products	0.0	0.0	58.2	53.4	-0.3	-0.4	-0.4	-0.4	-0.5	-0.2	-0.4	-0.6	-0.4	-0.4	-0.7	-0.3	-0.4	-0.3	-0.4
Motor vehicles	0.0	0.0	52.1	43.0	-0.2	-0.4	-0.4	-0.5	-0.7	-0.2	-0.4	-0.6	-0.5	-0.5	-0.9	-0.4	-0.4	-0.3	-0.4
Machinery	-0.2	-0.1	60.4	62.4	-0.4	-0.6	-0.6	-0.7	-0.7	-0.3	-0.6	-0.7	-0.7	-0.7	-1.1	-0.5	-0.6	-0.6	-0.5
Elect. machinery	-0.3	-0.3	58.4	53.0	-0.5	-0.6	-0.6	-0.7	-0.7	-0.4	-0.6	-0.6	-0.6	-0.6	-1.1	-0.5	-0.6	-0.6	-0.6
Electricity	0.0	0.1	-0.6	0.3	-0.3	-0.4	-0.3	-0.4	-0.6	-0.1	-0.4	-0.5	-0.4	-0.4	-0.6	-0.3	-0.4	-0.4	-0.3
Utilities	0.0	0.0	7.8	9.1	-0.3	-0.3	-0.3	-0.3	-0.3	-0.3	-0.3	-0.4	-0.3	-0.3	-0.8	-0.2	-0.3	-0.3	-0.3
Transport services	-0.1	0.0	6.9	7.5	-0.1	-0.2	-0.2	-0.2	-0.2	-0.1	-0.2	-0.2	-0.2	-0.2	-0.4	-0.2	-0.2	-0.2	-0.2
Comm services	-0.1	-0.1	7.2	7.6	-0.2	-0.3	-0.3	-0.3	-0.3	-0.2	-0.3	-0.3	-0.2	-0.2	-0.6	-0.2	-0.3	-0.2	-0.2
Financial services	-0.1	-0.1	7.8	8.3	-0.2	-0.2	-0.2	-0.3	-0.4	-0.2	-0.3	-0.3	-0.3	-0.2	-0.5	-0.2	-0.3	-0.2	-0.3
Other services	-0.1	0.0	7.4	8.3	-0.2	-0.3	-0.3	-0.3	-0.4	-0.2	-0.3	-0.4	-0.3	-0.3	-0.7	-0.3	-0.3	-0.3	-0.3

Source: CGE results provided by DG Trade (2019)

Table IV.1.21: Impact of the EU-AUS FTA on EU sector exports under the conservative scenario (%)

Sector	EU 27	UK	AUS	NZ	TK	USA	CAN	JP	KOR	EFTA	EU FTAs	ASEAN	ASEAN TPP	VT	Pacific	LDC	China	HK	ROW
Rice	-0.1	-0.1	-0.2	0.0	-0.2	-0.3	-0.3	-0.3	-0.3	-0.2	-0.3	-0.4	-0.3	-0.3	-0.5	-0.3	-0.3	-0.4	-0.3
Cereals	0.1	0.0	0.0	0.2	-0.1	-0.1	-0.1	-0.1	0.0	0.0	-0.1	-0.1	-0.1	0.0	0.0	-0.1	-0.1	-0.1	-0.1
Vegetables and fruit	-0.3	-0.4	7.4	1.7	0.0	0.0	0.0	0.1	0.2	0.0	0.0	0.0	0.0	0.0	1.0	0.0	0.0	0.1	0.0
Oilseeds	-0.1	-0.1	0.9	1.1	-0.1	-0.2	-0.2	-0.2	-0.2	-0.1	-0.2	-0.2	-0.2	-0.2	-0.1	-0.2	-0.2	-0.2	-0.2
Sugar	0.0	0.0	0.1	-0.1	-0.2	-0.3	-0.2	-0.3	-0.3	-0.1	-0.2	-0.3	-0.3	-0.3	-0.2	-0.2	-0.3	-0.3	-0.2
Fiber crop	-0.1	0.0	0.7	2.1	-0.1	-0.1	-0.1	-0.1	-0.1	0.0	-0.1	-0.1	-0.1	-0.1	0.1	-0.1	0.0	-0.1	-0.1
Bovine meat	0.6	3.7	0.1	0.6	-0.1	-0.2	-0.2	-0.3	-0.3	-0.1	-0.3	-0.3	-0.2	-0.3	0.0	-0.2	-0.2	-0.1	-0.2
Other animal products	-0.1	-0.5	2.9	0.5	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	-0.1	0.0	0.0	0.4	0.0	0.0	0.0	0.0
Other meat	0.0	0.0	0.9	29.4	-0.1	-0.2	-0.2	-0.2	-0.2	-0.1	-0.2	-0.2	-0.2	-0.2	-0.2	-0.1	-0.2	-0.2	-0.1
Dairy	0.1	0.1	47.8	27.2	-0.1	-0.2	-0.1	-0.3	-0.6	-0.1	-0.2	-0.3	-0.2	-0.2	-0.1	-0.1	-0.1	-0.3	-0.2
Wood and paper	0.0	-0.1	20.7	5.0	-0.1	-0.3	-0.3	-0.3	-0.3	-0.1	-0.3	-0.3	-0.3	-0.3	-0.4	-0.2	-0.3	-0.3	-0.2
Fishing	0.0	-0.1	5.0	1.2	-0.1	-0.1	-0.1	-0.1	-0.1	0.0	-0.1	-0.1	-0.1	-0.1	0.0	-0.1	0.0	0.0	-0.1
Coal	-0.1	-0.1	-0.3	-0.4	-0.2	-0.2	-0.2	-0.4	-0.3	-0.2	-0.3	-0.3	-0.3	-0.3	-0.5	-0.2	-0.3	-0.3	-0.3
Oil	-0.1	0.0	0.0	0.2	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.2	-0.1	-0.1	-0.2	-0.1
Gas	-0.3	-0.2	1.5	1.2	-0.4	-0.4	-0.5	-0.6	-0.6	-0.2	-0.5	-0.7	-0.6	-0.4	-0.5	-0.4	-0.4	-0.5	-0.4
Minerals	0.0	0.0	0.7	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	-0.1	0.0	-0.4	0.0	0.0	0.0	0.0
Other food	0.0	-0.1	11.2	12.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.2	-0.1	-0.1	-0.2	-0.1	-0.1	-0.1	-0.1
Beverages & tobacco	-0.1	-0.8	6.7	5.8	0.0	-0.1	-0.1	-0.1	-0.2	0.0	-0.1	-0.1	-0.1	-0.1	-0.1	0.0	-0.1	-0.1	-0.1
Textiles	-0.2	-0.2	47.8	47.3	-0.2	-0.3	-0.3	-0.3	-0.3	-0.2	-0.3	-0.3	-0.3	-0.3	-0.4	-0.3	-0.3	-0.3	-0.3
Chemicals	-0.1	-0.1	6.5	9.1	-0.1	-0.2	-0.2	-0.2	-0.2	-0.1	-0.2	-0.3	-0.2	-0.2	-0.4	-0.2	-0.2	-0.2	-0.2
Oil products	0.0	0.0	0.0	3.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.1	-0.1	0.0	-0.1	0.0	-0.1	-0.1	0.0
Metal products	-0.1	0.0	21.7	21.2	-0.2	-0.3	-0.3	-0.3	-0.4	-0.2	-0.3	-0.4	-0.3	-0.3	-0.7	-0.2	-0.3	-0.3	-0.3
Non metal products	0.0	0.0	22.4	17.3	-0.2	-0.2	-0.2	-0.2	-0.3	-0.1	-0.2	-0.3	-0.2	-0.2	-0.3	-0.2	-0.2	-0.2	-0.2
Motor vehicles	0.0	0.0	37.7	22.2	-0.1	-0.2	-0.2	-0.3	-0.4	-0.1	-0.2	-0.4	-0.3	-0.3	-0.4	-0.2	-0.2	-0.2	-0.2
Machinery	-0.1	-0.1	21.1	19.5	-0.2	-0.3	-0.3	-0.4	-0.4	-0.2	-0.3	-0.4	-0.3	-0.3	-0.5	-0.3	-0.3	-0.3	-0.3
Elect. machinery	-0.2	-0.2	12.7	11.9	-0.2	-0.3	-0.3	-0.4	-0.4	-0.2	-0.3	-0.3	-0.3	-0.3	-0.5	-0.3	-0.3	-0.3	-0.3
Electricity	0.0	0.0	-0.3	0.0	-0.2	-0.2	-0.2	-0.2	-0.3	-0.1	-0.2	-0.2	-0.2	-0.2	-0.3	-0.2	-0.2	-0.2	-0.2
Utilities	0.0	0.0	7.8	7.9	-0.1	-0.2	-0.2	-0.2	-0.2	-0.1	-0.2	-0.2	-0.2	-0.1	-0.4	-0.1	-0.2	-0.2	-0.1
Transport services	-0.1	0.0	6.9	7.2	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.2	-0.1	-0.1	-0.1	-0.1
Comm services	-0.1	-0.1	7.3	7.2	-0.1	-0.2	-0.1	-0.2	-0.2	-0.1	-0.1	-0.2	-0.1	-0.1	-0.3	-0.1	-0.2	-0.1	-0.1
Financial services	-0.1	-0.1	7.8	7.8	-0.1	-0.1	-0.1	-0.2	-0.2	-0.1	-0.1	-0.2	-0.1	-0.1	-0.3	-0.1	-0.2	-0.1	-0.1
Other services	-0.1	0.0	7.5	7.8	-0.1	-0.2	-0.2	-0.2	-0.2	-0.1	-0.2	-0.2	-0.1	-0.2	-0.3	-0.1	-0.2	-0.2	-0.2

Source: CGE results provided by DG Trade (2019)

Table IV.1.22: Impact of the EU-AUS FTA on Australian sector exports under the ambitious scenario (%)

Sector	EU 27	UK	AUS	NZ	TK	US	CAN	JP	KOR	EFTA	EU FTAs	ASEAN	ASEAN TPP	VT	Pacific	LDC	China	HK	ROW
Rice	112.7	111.8	0.5	0.9	0.5	0.4	0.4	0.3	0.4	0.6	0.3	0.3	0.3	0.3	0.1	0.4	0.4	0.2	0.3
Cereals	52.1	52.2	-0.3	1.3	-1.2	-1.1	-1.1	-1.0	-0.7	-1.2	-1.1	-0.8	-0.8	-0.4	-0.1	-1.0	-1.0	-1.1	-1.1
Vegetables and fruit	18.2	18.0	-0.4	1.1	-1.3	-1.2	-1.2	-1.0	-1.0	-1.2	-1.1	-1.2	-1.2	-1.2	0.2	-1.2	-1.3	-1.1	-1.2
Oilseeds	4.2	4.2	-0.9	-0.7	-0.9	-1.1	-1.1	-1.0	-1.0	-1.0	-1.1	-1.1	-1.1	-1.1	-0.8	-1.1	-1.1	-1.0	-1.1
Sugar	123.0	121.3	0.3	0.4	0.3	0.1	0.2	0.0	0.1	0.4	0.1	0.0	0.1	0.1	0.2	0.2	0.1	0.1	0.2
Fiber crop	0.6	0.5	-0.4	1.4	-1.0	-1.0	-1.0	-0.9	-0.9	-1.0	-1.0	-0.9	-1.0	-1.0	-0.4	-1.0	-0.6	-1.0	-1.0
Bovine meat	527.9	422.8	-0.6	0.5	-2.9	-2.6	-2.8	-2.3	-1.4	-2.8	-3.0	-1.9	-2.1	-3.0	-1.2	-3.0	-2.3	-2.7	-2.9
Other animal products	23.5	23.3	-0.3	-0.1	-0.7	-0.7	-0.7	-0.6	-0.6	-0.7	-0.7	-0.7	-0.7	-0.7	0.0	-0.7	-0.6	-0.7	-0.7
Other meat	2.5	2.3	-0.1	-1.8	-0.2	-0.2	-0.2	-0.3	-0.2	-0.1	-0.3	-0.3	-0.3	-0.2	-0.2	-0.2	-0.3	-0.2	-0.2
Dairy	86.2	86.4	-9.0	-1.3	1.0	0.8	0.8	0.6	0.6	0.7	0.7	0.9	1.1	1.0	1.5	1.0	1.2	0.7	0.9
Wood and paper	2.6	2.7	-1.3	1.1	1.8	0.7	0.7	0.7	0.6	1.0	0.7	0.6	0.6	0.6	0.5	0.8	0.7	0.7	0.8
Fishing	22.4	22.3	-0.1	0.5	-0.4	-0.4	-0.4	-0.4	-0.5	-0.5	-0.5	-0.5	-0.5	-0.4	-0.4	-0.4	-0.4	-0.3	-0.4
Coal	0.6	0.6	0.3	0.3	0.4	0.5	0.5	0.2	0.3	0.6	0.4	0.3	0.3	0.4	-0.2	0.5	0.3	0.3	0.3
Oil	0.4	0.5	0.5	0.8	0.3	0.3	0.3	0.3	0.3	0.4	0.3	0.3	0.3	0.3	0.2	0.3	0.3	0.2	0.3
Gas	6.9	7.8	-19.9	-6.5	6.2	6.2	6.1	4.7	4.8	7.1	6.0	4.4	5.1	6.2	5.3	5.9	5.5	5.5	5.9
Minerals	0.2	0.3	-0.1	2.1	0.1	0.1	0.1	0.0	0.0	0.0	0.1	-0.1	0.0	0.0	-0.9	0.1	0.0	0.1	0.0
Other food	74.2	74.2	-1.5	-0.1	0.2	0.1	0.1	0.1	0.1	0.2	0.1	0.0	0.1	0.1	0.1	0.2	0.1	0.1	0.1
Beverages & tobacco	17.7	16.9	-1.7	-0.2	0.3	0.3	0.2	0.2	0.1	0.3	0.2	0.1	0.2	0.2	0.1	0.3	0.2	0.2	0.2
Textiles	37.9	37.9	-2.1	-2.6	18.2	0.8	0.8	0.8	0.8	1.1	0.8	0.8	0.8	0.8	0.5	0.9	0.8	0.8	0.8
Chemicals	10.7	10.7	-3.4	-1.3	10.1	1.4	1.4	1.3	1.3	1.6	1.3	1.2	1.3	1.3	1.0	1.3	1.2	1.3	1.4
Oil products	2.2	2.2	0.4	0.9	7.8	0.4	0.4	0.4	0.4	0.5	0.4	0.4	0.4	0.4	0.1	0.4	0.4	0.4	0.4
Metal products	5.4	5.5	-2.8	-2.7	1.5	1.3	1.3	1.2	1.1	1.4	1.2	1.1	1.2	1.2	0.3	1.3	1.3	1.3	1.3
Non metal products	21.3	21.4	-3.9	-1.2	21.1	0.9	0.9	0.7	0.7	1.1	0.8	0.6	0.7	0.8	0.4	0.9	0.8	0.9	0.8
Motor vehicles	16.0	16.0	-7.1	-5.6	20.9	1.9	1.9	1.8	1.6	2.1	1.9	1.6	1.8	1.8	1.4	1.9	1.9	2.0	1.9
Machinery	10.1	10.1	-8.2	-8.3	10.1	1.0	1.0	1.0	0.9	1.3	1.0	0.9	1.0	1.0	0.5	1.1	1.0	1.0	1.1
Elect. machinery	5.2	5.2	-0.7	0.6	12.9	1.0	1.0	1.0	0.9	1.3	1.0	1.0	1.0	1.0	0.5	1.1	1.0	1.0	1.0
Electricity	1.1	1.3	0.6	1.5	0.9	0.8	0.8	0.7	0.6	1.0	0.8	0.7	0.7	0.7	0.6	0.8	0.7	0.8	0.8
Utilities	10.9	0.6	-0.7	0.3	0.3	0.2	0.2	0.2	0.2	0.3	0.2	0.1	0.2	0.3	-0.3	0.3	0.2	0.3	0.3
Transport services	9.2	0.5	-1.2	-0.6	0.4	0.3	0.4	0.3	0.3	0.4	0.4	0.3	0.3	0.4	0.1	0.4	0.3	0.3	0.4
Comm services	9.3	0.5	-0.8	-0.4	0.4	0.3	0.3	0.3	0.2	0.4	0.3	0.3	0.3	0.4	0.0	0.4	0.3	0.4	0.3
Financial services	9.1	0.3	-0.4	0.1	0.2	0.2	0.2	0.1	0.0	0.3	0.2	0.1	0.2	0.2	-0.1	0.2	0.1	0.2	0.2
Other services	9.1	0.5	-0.7	0.2	0.3	0.2	0.2	0.2	0.1	0.3	0.2	0.1	0.2	0.2	-0.2	0.3	0.2	0.2	0.2

Source: CGE results provided by DG Trade (2019)

Table IV.1.23: Impact of the EU-AUS FTA on Australian sector exports under the conservative scenario (%)

Sector	EU 27	UK	AUS	NZ	TK	USA	CAN	JP	KOR	EFTA	EU FTAs	ASEAN	ASEAN TPP	VT	Pacific	LDC	China	HK	ROW
Rice	0.7	0.7	0.4	0.7	0.5	0.4	0.4	0.3	0.4	0.5	0.4	0.3	0.3	0.4	0.2	0.4	0.4	0.3	0.4
Cereals	0.1	0.1	0.0	0.1	-0.1	-0.1	-0.1	-0.1	0.0	-0.1	-0.1	-0.1	-0.1	-0.1	0.0	-0.1	-0.1	-0.1	-0.1
Vegetables and fruit	19.2	19.0	0.0	1.3	-0.4	-0.4	-0.4	-0.3	-0.3	-0.4	-0.4	-0.4	-0.4	-0.4	0.6	-0.4	-0.4	-0.3	-0.4
Oilseeds	5.1	5.2	-0.2	0.0	-0.1	-0.2	-0.1	-0.2	-0.2	-0.1	-0.2	-0.2	-0.2	-0.2	-0.1	-0.2	-0.2	-0.2	-0.2
Sugar	0.5	0.5	0.2	0.4	0.4	0.3	0.4	0.3	0.3	0.5	0.3	0.2	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Fiber crop	1.7	1.7	0.1	1.2	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.1	-0.2	-0.1	0.1	-0.1	-0.1	-0.1	-0.1
Bovine meat	0.5	0.3	0.5	0.4	0.3	0.2	0.2	0.1	0.1	0.3	0.1	0.1	0.2	0.1	0.3	0.2	0.2	0.3	0.2
Other animal products	24.2	23.8	-0.1	0.3	-0.1	-0.2	-0.2	-0.1	-0.1	-0.1	-0.2	-0.2	-0.2	-0.2	0.3	-0.2	-0.2	-0.2	-0.2
Other meat	2.8	2.9	0.0	-2.2	0.2	0.1	0.1	0.1	0.1	0.2	0.1	0.1	0.1	0.1	0.1	0.2	0.1	0.1	0.1
Dairy	0.8	0.8	-9.4	-2.8	0.9	0.8	1.0	0.7	0.4	0.9	0.7	0.7	0.8	0.8	0.9	0.9	0.8	0.7	0.8
Wood and paper	2.4	2.4	-1.4	0.3	1.7	0.6	0.6	0.6	0.6	0.8	0.6	0.6	0.6	0.6	0.5	0.7	0.6	0.6	0.6
Fishing	22.6	22.5	0.0	0.6	-0.4	-0.4	-0.4	-0.4	-0.4	-0.3	-0.4	-0.4	-0.4	-0.3	-0.3	-0.4	-0.3	-0.3	-0.4
Coal	0.4	0.4	0.3	0.4	0.3	0.3	0.3	0.2	0.2	0.4	0.3	0.2	0.2	0.3	0.0	0.4	0.3	0.2	0.2
Oil	0.3	0.4	0.3	0.7	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.2	0.3	0.3	0.3	0.3
Gas	0.9	0.9	0.4	1.8	0.7	0.7	0.7	0.5	0.5	0.8	0.7	0.6	0.6	0.7	0.6	0.7	0.6	0.6	0.7
Minerals	0.1	0.2	0.1	1.1	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	-0.4	0.0	0.0	0.0	0.0
Other food	74.4	74.2	-1.5	-0.5	0.3	0.2	0.2	0.2	0.2	0.3	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Beverages & tobacco	17.6	16.8	-1.8	-0.5	0.3	0.2	0.2	0.2	0.1	0.3	0.2	0.1	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Textiles	37.5	37.5	-0.7	-0.9	18.1	0.7	0.7	0.6	0.6	0.8	0.7	0.7	0.6	0.7	0.5	0.7	0.7	0.7	0.7
Chemicals	9.7	9.7	-0.9	-0.2	9.4	0.7	0.7	0.7	0.7	0.8	0.7	0.6	0.7	0.7	0.5	0.7	0.6	0.7	0.7
Oil products	1.9	1.9	0.2	0.4	7.5	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.0	0.1	0.1	0.1	0.1
Metal products	4.5	4.6	-1.0	-0.8	0.8	0.7	0.7	0.7	0.6	0.8	0.7	0.6	0.7	0.7	0.3	0.7	0.7	0.7	0.7
Non metal products	20.7	20.7	-1.4	0.0	20.7	0.5	0.5	0.4	0.4	0.6	0.5	0.4	0.4	0.5	0.3	0.5	0.5	0.5	0.5
Motor vehicles	14.7	14.7	-5.4	-2.9	20.1	1.2	1.2	1.1	1.0	1.3	1.2	1.1	1.2	1.2	1.0	1.2	1.2	1.3	1.2
Machinery	9.5	9.5	-2.6	-2.2	9.7	0.7	0.7	0.7	0.6	0.9	0.7	0.6	0.7	0.7	0.5	0.7	0.7	0.7	0.7
Elect. machinery	4.8	4.8	0.4	0.9	12.6	0.8	0.8	0.7	0.7	0.9	0.7	0.7	0.7	0.7	0.5	0.8	0.8	0.8	0.8
Electricity	0.7	0.7	0.4	0.7	0.5	0.5	0.5	0.5	0.4	0.6	0.5	0.5	0.5	0.5	0.4	0.5	0.5	0.5	0.5
Utilities	10.8	0.4	-0.8	-0.9	0.3	0.2	0.3	0.2	0.2	0.3	0.3	0.2	0.3	0.3	0.1	0.3	0.3	0.3	0.3
Transport services	9.1	0.4	-1.2	-0.9	0.3	0.3	0.3	0.3	0.3	0.4	0.3	0.3	0.3	0.3	0.2	0.3	0.3	0.3	0.3
Comm services	9.1	0.4	-0.9	-1.0	0.4	0.3	0.3	0.3	0.3	0.4	0.3	0.3	0.3	0.3	0.2	0.3	0.3	0.3	0.3
Financial services	9.1	0.3	-0.4	-0.4	0.3	0.3	0.3	0.2	0.2	0.3	0.3	0.2	0.3	0.3	0.2	0.3	0.2	0.3	0.3
Other services	9.1	0.4	-0.7	-0.4	0.3	0.3	0.3	0.2	0.2	0.3	0.3	0.2	0.3	0.3	0.1	0.3	0.3	0.3	0.3

Source: CGE results provided by DG Trade (2019)



Table IV.1.24: Impact of the EU-AUS FTA on aggregate sector exports under the ambitious scenario (%)

Sector	EU 27	UK	AUS	NZ	TK	USA	CAN	JP	KOR	EFTA	EU FTAs	ASEAN	ASEAN TPP	VT	Pacific	LDC	China	HK	ROW
Rice	-0.3	0.3	1.1	-0.2	-0.1	0.0	-0.1	0.0	0.0	0.0	0.0	0.1	0.1	0.0	-0.5	0.0	0.0	0.0	0.0
Cereals	-0.1	-0.1	-0.2	-2.0	-0.4	0.0	0.0	0.2	0.0	0.0	0.0	0.6	0.3	0.0	-1.2	0.0	0.1	0.0	0.1
Vegetables and fruit	-0.2	0.0	-0.2	5.3	-0.1	0.0	0.0	0.0	0.0	-0.2	0.0	0.1	0.0	0.0	0.5	-0.1	0.0	-0.1	-0.1
Oilseeds	-0.2	0.0	0.7	-1.2	-0.1	0.0	0.0	0.0	-0.1	-0.1	0.1	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sugar	-0.4	-0.4	4.8	-1.1	-0.1	0.0	-0.1	0.0	0.1	0.0	0.0	0.1	0.0	-0.1	-0.5	-0.1	0.0	-0.1	0.0
Fiber crop	0.0	0.3	-0.6	-1.3	-0.1	0.0	0.0	0.1	0.2	0.0	0.0	0.1	0.1	0.0	-0.1	0.0	0.0	0.0	0.0
Bovine meat	-3.5	-0.7	8.9	5.8	-1.6	0.1	0.2	-2.9	0.3	-2.8	-1.4	0.8	0.4	-1.1	0.4	-0.1	-0.8	-0.2	-0.2
Other animal products	-0.1	0.1	0.4	0.9	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.1	0.0	0.0	-0.2	0.0	0.0	0.0	0.0
Other meat	0.0	0.6	-0.2	-0.7	-0.1	0.0	0.0	0.1	0.0	0.0	0.1	0.2	0.1	0.0	-0.2	0.0	0.1	-0.1	0.0
Dairy	-0.1	-0.1	1.6	0.9	0.2	0.1	-0.2	0.2	-0.4	-0.4	0.3	0.5	0.3	0.3	-0.1	0.3	-0.1	0.1	0.3
Wood and paper	0.0	0.3	0.8	-1.3	0.0	0.1	0.0	0.1	0.1	0.2	0.0	0.1	0.0	0.0	0.5	0.0	0.0	-0.1	0.1
Fishing	0.0	0.0	0.1	-1.1	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.2	-0.1	0.0	-0.1	0.0
Coal	-0.3	-0.4	0.3	-0.4	-0.2	0.0	-0.1	0.0	0.1	0.0	0.0	0.0	-0.1	-0.1	0.7	-0.1	-0.1	0.0	-0.1
Oil	-0.1	-0.2	0.3	-0.8	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.2	0.0	0.1	0.3	0.0
Gas	5.7	12.9	4.9	-9.6	-0.3	-1.1	-0.1	-1.0	-0.6	0.0	-0.2	-0.5	-0.2	-0.3	0.2	-0.3	-0.9	-1.2	0.0
Minerals	-0.1	-0.1	0.0	-5.1	-0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.2	0.0	0.0	-0.1	0.0
Other food	0.0	0.2	1.3	0.7	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.1	-0.1	-0.1	-0.1	0.0	0.0	-0.1	0.0
Beverages & tobacco	-0.1	0.1	3.3	1.6	0.0	-0.1	0.0	0.0	0.0	0.0	-0.1	0.0	-0.1	0.0	-0.1	0.0	-0.1	0.0	0.0
Textiles	0.1	0.6	5.2	2.6	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.2	0.0	0.1	-1.2	0.0	0.0	-0.1	0.0
Chemicals	0.0	0.1	1.9	2.5	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.2	0.0	0.0	-0.1	0.0
Oil products	0.0	-0.1	0.6	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	-0.1	0.0
Metal products	0.0	0.8	1.3	-1.7	0.0	0.0	0.1	0.1	0.1	-0.1	0.2	0.0	-0.1	0.0	-1.3	0.0	0.0	0.0	0.0
Non metal products	0.2	0.5	1.8	-2.1	0.0	0.0	-0.1	0.0	0.1	0.1	-0.1	0.0	-0.2	-0.1	0.4	0.0	0.0	0.0	0.0
Motor vehicles	0.4	0.7	2.1	-1.0	0.1	-0.1	-0.1	-0.3	-0.6	0.1	0.0	-0.7	-0.1	0.0	0.8	0.0	-0.2	-0.1	0.0
Machinery	0.3	0.8	0.9	-1.9	0.0	-0.2	-0.2	0.0	0.2	-0.1	-0.1	-0.1	-0.1	-0.1	-0.9	-0.1	-0.1	-0.1	0.0
Elect. machinery	-0.1	0.3	1.5	-0.3	-0.1	0.0	0.0	0.1	0.2	-0.1	0.0	0.2	0.0	0.1	0.8	-0.1	0.0	0.0	-0.1
Electricity	-0.1	-0.3	0.9	-0.4	0.0	0.1	0.0	0.2	0.3	0.1	0.1	0.4	0.3	0.2	0.4	0.0	0.1	0.1	0.1
Utilities	-0.2	-0.3	2.1	2.4	0.0	0.1	0.1	0.2	0.2	0.1	0.1	0.3	0.2	0.1	0.6	0.1	0.2	0.0	0.1
Transport services	0.0	-0.2	1.5	0.4	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.1	0.1	0.0	0.3	0.0	0.0	0.0	0.0
Comm services	-0.1	-0.3	2.2	0.5	0.0	0.2	0.1	0.1	0.3	0.1	0.1	0.3	0.2	0.1	0.6	0.1	0.1	0.1	0.1
Financial services	-0.1	-0.3	1.4	0.8	0.0	0.2	0.1	0.2	0.3	0.1	0.1	0.3	0.2	0.1	0.7	0.1	0.1	0.1	0.1
Other services	-0.1	-0.3	1.6	0.2	0.0	0.1	0.0	0.1	0.2	0.0	0.1	0.2	0.1	0.1	0.6	0.0	0.1	0.0	0.1

Source: CGE results provided by DG Trade (2019)

Table IV.1.25: Impact of the EU-AUS FTA on aggregate sector exports under the conservative scenario (%)

Sector	EU 27	UK	AUS	NZ	TK	USA	CAN	JP	KOR	EFTA	EU FTAs	ASEAN N	ASEAN TPP	VT	Pacific	LDC	China	HK	ROW
Rice	-0.1	0.0	0.3	-0.6	-0.1	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.1	0.0	-0.2	0.0	0.0	0.0	0.0
Cereals	0.0	-0.1	-0.1	-1.0	0.1	0.0	0.0	0.1	0.0	0.0	0.0	0.1	0.1	0.0	-0.2	0.0	0.1	0.0	0.0
Vegetables and fruit	-0.2	-0.2	0.6	6.1	-0.1	0.0	0.0	0.0	0.1	-0.2	0.0	0.1	0.0	0.0	0.4	-0.1	0.0	-0.1	-0.1
Oilseeds	-0.1	-0.1	1.6	-0.2	-0.1	0.0	0.0	0.0	0.0	-0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Sugar	0.0	-0.1	0.3	-0.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.2	0.1	0.0	0.0	0.0
Fiber crop	-0.1	-0.1	0.0	-0.2	0.0	0.0	0.0	0.1	0.2	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Bovine meat	0.6	0.1	0.1	-0.2	0.4	0.1	0.1	0.9	0.2	0.7	0.5	0.2	0.1	0.4	0.5	0.1	0.4	0.1	0.1
Other animal products	-0.1	-0.1	0.9	1.5	0.0	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	0.0
Other meat	0.0	-0.1	0.1	0.6	0.0	0.0	0.0	0.1	0.1	0.0	0.1	0.2	0.0	0.0	-0.2	0.0	0.0	0.0	0.0
Dairy	0.2	0.3	0.6	-1.0	0.0	-0.2	0.2	-0.1	-0.7	-0.2	0.1	0.2	0.1	0.1	-0.3	0.1	-0.3	-0.1	0.1
Wood and paper	0.0	0.5	0.6	-0.5	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	-0.1	0.0	0.2	0.0	0.0	0.0	0.0
Fishing	0.0	0.0	0.1	-1.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Coal	-0.1	-0.2	0.2	0.0	-0.1	0.0	-0.1	0.0	0.1	0.0	0.0	0.0	0.0	-0.1	0.3	-0.1	-0.1	0.0	0.0
Oil	-0.1	-0.1	0.3	-0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0
Gas	-0.3	-0.3	0.6	-1.2	0.0	0.1	0.0	0.3	0.2	0.0	0.0	0.1	0.0	0.1	0.2	0.0	0.0	0.0	0.0
Minerals	0.0	0.0	0.0	-2.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Other food	0.1	0.2	1.3	1.2	0.0	0.0	0.0	0.0	-0.1	0.0	0.0	0.0	-0.1	0.0	-0.1	0.0	0.0	-0.1	0.0
Beverages & tobacco	0.0	0.1	3.3	1.9	0.0	-0.1	0.0	0.0	0.0	-0.1	-0.1	0.0	-0.1	0.0	-0.1	0.0	-0.1	0.0	0.0
Textiles	0.0	0.3	5.2	3.9	0.0	0.0	0.0	0.1	0.1	0.0	0.0	0.1	0.0	0.0	-0.6	0.0	0.0	0.0	0.0
Chemicals	0.0	0.0	1.5	4.3	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Oil products	0.0	0.0	0.3	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Metal products	-0.1	0.3	0.8	-0.1	0.0	0.0	0.1	0.0	0.1	0.0	0.1	0.0	-0.1	0.0	-0.5	0.0	0.0	0.1	0.0
Non metal products	0.1	0.2	2.0	-0.3	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	-0.1	0.0	0.1	0.0	0.0	0.1	0.0
Motor vehicles	0.3	0.6	1.8	-0.1	0.1	-0.1	0.0	-0.2	-0.5	0.0	0.0	-0.5	-0.1	0.0	0.3	0.0	-0.1	0.0	0.0
Machinery	0.0	0.2	1.4	0.3	0.0	-0.1	-0.1	0.0	0.2	0.0	0.0	0.0	0.0	0.0	-0.3	0.0	0.0	0.0	0.0
Elect. machinery	-0.2	-0.1	1.3	1.0	0.0	0.0	0.0	0.1	0.2	0.0	0.0	0.1	0.0	0.0	0.4	0.0	0.0	0.0	0.0
Electricity	-0.1	-0.1	0.5	0.0	0.0	0.1	0.0	0.1	0.1	0.1	0.0	0.1	0.1	0.1	0.2	0.0	0.1	0.1	0.1
Utilities	-0.1	-0.1	2.0	3.0	0.0	0.0	0.1	0.1	0.2	0.0	0.1	0.1	0.1	0.1	0.2	0.0	0.1	0.0	0.0
Transport services	0.0	-0.1	1.4	0.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0
Comm services	0.0	-0.1	2.1	0.9	0.0	0.1	0.0	0.1	0.2	0.0	0.0	0.1	0.1	0.1	0.2	0.0	0.0	0.0	0.0
Financial services	-0.1	-0.1	1.4	1.3	0.0	0.1	0.0	0.1	0.2	0.0	0.1	0.1	0.1	0.1	0.3	0.0	0.0	0.0	0.0
Other services	0.0	-0.2	1.6	0.8	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.1	0.0	0.0	0.2	0.0	0.0	0.0	0.0

Source: CGE results provided by DG Trade (2019)

## IV.2 Gravity regression results

Table IV.2.1: Impact of the EU-AUS FTA on Public Procurement (Baseline PPML estimates)

Variable	Baseline
PPA <sub>ijt</sub>	0.408*** (0.0360)
GPA <sub>ijt</sub>	0.268*** (0.0539)
Observations	27,570
Pseudo-R2	0.9998
Fixed effects	it, jt, ij
Robust standard errors in parentheses ***p<0.01, **p<0.05, *p<0.1	

Source: Author's own calculations based on CGE results provided by DG Trade (2019)

Table IV.2.2: Impact of the EU-AUS FTA on Investment

Variable	FDI <sup>F</sup> <sub>ijt</sub>	FDI <sup>S</sup> <sub>ijt</sub>
	0.627*** (0.286)	0.189*** (0.0510)
PIA <sub>ijt</sub>		
	-0.546 (0.431)	0.0 (0.0804)
BIT <sub>ijt</sub>		
Observations	7,144	10,102
Pseudo-R2	0.9072	0.9853
Fixed effects	it, jt, ij	
Robust standard errors in parentheses		
***p<0.01, **p<0.05, *p<0.1		

Source: Author's own calculations based on CGE results provided by DG Trade (2019)

## IV.3 Econometric (partial equilibrium) GSIM modelling results

Table IV.3.1: Impact of the EU-AUS FTA on bilateral iron ore trade flows

Countries	EU27	UK	AUS	NZ	China	Brazil	USA	LDC	ROW
EU27	0.0	-0.2	7.1	0.1	0.0	0.0	0.0	0.1	0.0
UK	-0.2	0.0	6.9	0.0	-0.2	-0.2	-0.2	-0.1	-0.2
Australia	7.0	6.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0
New Zealand	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
China	0.0	-0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Brazil	0.0	-0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
US	0.0	-0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
LDC	0.0	-0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0
ROW	0.0	-0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0

Source: Author's own calculations based on UNComtrade data

Table IV.3.2: Impact of the EU-AUS FTA on iron trade values (€ millions)

Countries	EU27	UK	AUS	NZ	China	BRA	US	LDC	ROW
EU27	2.2	167.7	0.0	0.0	34.7	0.0	68.8	0.1	510.4
UK	0.6	0.0	0.0	0.0	0.1	0.0	0.1	0.1	0.0
Australia	51.9	32.8	0.0	0.1	31,611.4	0.0	1.8	0.0	6,806.3
New Zealand	0.0	0.0	0.0	0.0	103.9	0.0	0.0	0.0	0.0
China	0.2	0.0	0.1	0.0	0.0	0.0	0.1	0.0	334.8
Brazil	2,857.3	145.8	15.2	0.0	13,777.3	0.0	244.4	0.0	3,883.8
US	5.3	0.1	2.8	0.0	74.5	0.0	0.0	0.0	695.8
LDC	199.6	4.5	0.0	0.0	280.9	0.0	0.0	0.0	0.1
ROW	4,238.2	280.3	1.8	0.0	14,813.2	0.0	201.9	0.1	17,8576.9

Source: Author's own calculations based on UNComtrade data

Table IV.3.3: Impact of the EU-AUS FTA on iron ore prices, quantities and revenues

Countries	Change in output (%)	Change in producer price (%)	Change in FOB price (%)	Change in producer revenues	Value of change in producer revenues (€)
EU27	-0.0	-0.0	-0.0	-0.0	-145,668.9
UK	0.0	0.0	0.0	0.1	701.2
Australia	0.0	0.0	0.0	0.0	2,637,163.2
New Zealand	0.0	0.0	0.0	0.0	1,876.9
China	-0.0	0.0	0.0	0.0	-249.9
Brazil	-0.0	0.0	0.0	0.0	-231,383.1
US	0.0	0.0	0.0	0.0	22.2
LDC	-0.0	0.0	0.0	0.0	-23,037.0
ROW	-0.0	0.0	0.0	0.0	-608,391.0

Source: Author's own calculations based on UNComtrade data

Table IV.3.4: Impact of the EU-AUS FTA on iron ore welfare

Countries	Producer surplus	Downstream/ final consumer effects			Total welfare (€)
	Change in producer surplus (€)	Change in consumer surplus (€)	Change in consumer prices (%)	Change in total consumption (%)	
EU27	-80,927.2	984,325.1	-0.0	0.0	903,398.0
UK	389.5	620,997.8	-0.1	0.1	621,387.3
Australia	1,465,090.7	1,312.6	-0.0	0.0	1,466,403.2
New Zealand	1,042.7	-5.3	0.0	0.0	1,037.4
China	-138.8	-1,212,012.3	0.0	0.0	-1,212,151.1
Brazil	-128,546.2	-0.1	0.0	0.0	-128,546.3
US	12.3	9,901.4	-0.0	0.0	9,913.7
LDC	-12,798.4	-22.6	0.0	-0.0	-12,821.0
ROW	-337,995.0	136,872.9	-0.0	0.0	-201,122.1

Source: Author's own calculations based on UNComtrade data

## V. ANNEX V: SECTOR AND CASE STUDY SELECTION

### V.1 Sector selection methodology and proposal

#### *Sector selection methodology*

Before the sector selection can start, it is important to consider what constitutes a “sector”. For practical reasons, the study team took the definition of sectors as established in the Commission’s impact assessment as the starting point. This distinguishes 32 sectors which in turn have been derived from the 57 sectors defined in GTAP 9.<sup>87</sup> In our proposal we offer to carry out five sector studies.

In order to identify the sectors that are most important and relevant for the study, the following criteria – looking at both Australia and the EU – have been applied:

- **Criterion 1: Importance of a sector for the economy.** This has been measured considering a sector’s size in terms of its share in total employment and output/value added.
- **Criterion 2: Magnitude of the FTA’s expected economic impact on a sector.** Using the results of the ambitious scenario of the Commission’s CGE analysis, the Agreement’s impact on bilateral exports and total output has been used and consolidated into one score.<sup>88</sup>
- **Criterion 3: Magnitude of the FTA’s expected social, human rights and/or environmental impact.** To assign sectoral scores for the social, environmental and human rights impacts of the FTA, the ex-ante study and the Commission’s impact assessment were reviewed, and further information – obtained from the literature, media and stakeholders – has been evaluated and rated by the team.
- **Criterion 4: Importance of specific issues raised by stakeholders and issues of particular relevance/importance/sensitivity from a negotiating perspective.**<sup>89</sup> The goal of the SIA is to generate analytical and stakeholder-driven findings that are relevant for the ongoing negotiations, as well as address those issues which are considered of high importance by stakeholders and civil society in general. Therefore, views of stakeholders have been collected during the inception phase and have informed the sector selection. Such view comprised both the importance of a sector in the economy (including factors such as its role in innovation or its enabling nature for other sectors, both up- and downstream) and the expected impact of the FTA on it. During the study, this selection will be further validated as part of the comprehensive consultations to be undertaken.

As various criteria have been used, the individual scores needed to be aggregated into one overall sector score and rank in order to select the five “most important” sectors for the in-depth analysis. This has required assigning weights to the individual criteria. The methodology for this is as follows: First, the scores for Australia and the EU in criteria 1 to 3 were weighted equally to calculate average scores for these criteria (i.e. any potential impacts in Australia and the EU are considered as equally important). Then, criteria 2 and 3 on the impact of the FTA were considered more important than the importance of a sector

<sup>87</sup> GTAP sectors in turn are defined with reference to the International Standard Industrial Classification of all economic activities (ISIC) and the Central Product Classification (CPC).

<sup>88</sup> Note that both absolute and relative impact matters. For example, a large percentage change in a very small sector (or from a very small baseline value, such as EU gas exports to Australia in the Commission’s impact assessment) may get more attention than needed, while a smaller percentage change on a very large sector (e.g. construction services) might be much more important in practice. As the full CGE results have not yet been available to the study team, for the sector selection absolute changes have been calculated based on standard GTAP values for output, and for trade, by multiplying the relative changes reported in the impact assessment with actual export and output levels.

<sup>89</sup> In the technical proposal, this criterion was split into two, Criterion 4: Importance of specific issues raised by stakeholders, and Criterion 5: Issues of particular relevance/importance/ sensitivity from a negotiating perspective. However, it has seemed more appropriate to collapse these two criteria into one as the study team is not privy to insight information into negotiations; hence, all information on the status of and issues in negotiations that is conveyed to the study team (e.g. through DGs) is filtered through the informant’s views and interests, and such information is thus rather to be considered as a stakeholder contribution.

in the economy (criterion 1) in isolation. This is because, if there is no clearly plausible causal link between the FTA and a sector, the impact on that sector would be definition be negligible, and an in-depth sector analysis would therefore not be warranted – even if the sector is economically very important. Finally, stakeholder contributions (criterion 4) were considered as still more important as they are based on a real-life view of the sectors, whereas criteria 1 to 3 are based on a narrow set of statistical data, CGE simulation results and literature review.

Finally, to ensure that the selected sectors cover a minimum level of variety and representativity across the economy and social landscape, after the ranking it has been checked that the selected sectors fulfil the following conditions: First, to ensure that gender issues are adequately reflected, the selected sectors need to also cover a balance in terms of male and female employment. Second, the inclusion of sectors with a high share of SMEs was also important. Third, the selected sectors should also cover primary (agriculture/extraction), secondary (industry) and tertiary (services) economic activities.

### ***Five sectors for in-depth analysis<sup>90</sup>***

Table 2.1 presents the results of the sector prioritization. It shows the rating of each sector in relation to each of the selection criteria in Australia and the EU, applying a simple 3-scale rating scheme (high/medium/low for each criterion). According to this prioritization exercise, and considering that a balance between goods and services sectors should be applied, the following sectors are proposed to be selected for a detailed sector analysis:

1. The **ruminant meats** sector is economically important in both Australia and the EU, and is expected to be affected relatively strongly by the FTA: it is expected to be the sector with the highest growth in exports from Australia to the EU (both in absolute and relative terms) and the highest relative growth in Australian output. At the same time, EU output is expected to decrease stronger, in relative terms, than any other sector. This has important potential social, human rights and environmental effects. Regarding the latter, the sector exerts pressure on the environment in a variety of ways. Apart from the geographically non-exclusive greenhouse gas impact of methane (CH<sub>4</sub>) emissions, farming of ruminants causes negative impacts on water quality (sediment run-off) and biodiversity (directly via land-use change or indirectly via sediment run-off) in Australia specifically. As ruminant meat output and exports are expected to grow significantly under a potential FTA, this merits further analysis. In the EU, impacts vary across regions, but as ruminant meat output overall is expected to decrease under the FTA, this could technically loosen the sector's pressures on the environment in the EU.
2. The **motor vehicles and transport equipment** is ranked very highly, given its high economic importance, particularly in the EU, and the anticipated high economic impact of the FTA – in Australia, output is expected to decline by 1.7 percent, while both EU exports and output are anticipated to increase. Following from the output decline in Australia, social and human rights there are also expected to be affected, therefore justifying a more in-depth analysis.
3. The **machinery** sector is also ranked very highly, given its economic importance, particularly in the EU, significant economic impact of the FTA (e.g. in Australia, output is expected to decline by 2.0 percent and EU exports will go up). For very different reasons than for motor vehicles and transport equipment, but as in that sector also because of a significant FTA impact, social and human rights there are also expected to be affected, justifying a more in-depth analysis.

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<sup>90</sup> Note the caveat on the CGE modelling results at the beginning of this report. A plausibility check has been undertaken to determine if a change in the sector selection is likely to result from the revised simulations. This has shown that the sector selection is likely to be robust, i.e. would not change in response to the revised modelling.

Table 2.1: Sector prioritization summary<sup>91</sup>

Sector	Criterion 1: Economic importance		Criterion 2: FTA economic impact		Criterion 3a: FTA social impact		Criterion 3b: FTA HR impact		Criterion 3c: FTA environmental impact		Criterion 4: Stakeholder and negotiating issues		Rank	Priority for selection
	AU	EU	AU	EU	AU	EU	AU	EU	AU	EU	AU	EU		
1 Cereals	Low	Low	Medium	Low	Low	Low	Low	Low	Low	Low	Medium	Low	20	Low
2 Rice	Low	Low	Low	Low	Medium	Low	Medium	Low	High	Low	Medium	Low	25	Low
3 Vegetables, Fruits, nuts	Low	Medium	Medium	Low	Medium	Low	Medium	Low	Medium	Low	Medium	Low	13	Medium
4 Oil seeds, vegetable oils & fats	Low	Low	Medium	Low	Medium	Low	Medium	Low	Low	Low	Low	Low	20	Low
5 Sugar	Low	Low	Low	Low	Medium	Low	Medium	Low	High	Medium	Medium	Low	25	Low
6 Plant & animal fibres and other crops	Medium	Medium	Medium	Medium	Medium	Low	Medium	Low	Low	Low	Low	Low	14	Medium
7 Ruminant meats	Medium	Low	High	Medium	High	High	High	High	High	High	Medium	Low	1	High
8 Other animal products	Low	High	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	25	Low
9 Other meat	Low	Medium	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	25	Low
10 Dairy	Medium	Medium	Low	Medium	Medium	Low	Medium	Low	Medium	Medium	High	Low	5	High
11 Wood and paper products	High	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low	16	Low
12 Coal	High	Low	Medium	Low	Low	Low	Low	Low	Medium	High	Low	Low	14	Medium
13 Oil	Low	Low	Low	Low	Low	Low	Low	Low	Medium	Low	Low	Low	25	Low
14 Gas	Low	Low	Medium	Low	Medium	Medium	Medium	Medium	Medium	Medium	Low	Low	9	Medium
15 Minerals	High	Low	Low	Low	Low	Low	Medium	Low	Medium	Low	Medium	Low	25	Low
16 Fishing	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	25	Low
17 Other food products	Medium	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low	20	Low
18 Beverages and tobacco	Medium	Medium	High	Low	Low	Low	Medium	Medium	Low	Low	Medium	Low	9	Medium
19 Textile, apparel, leather	Low	Medium	Medium	Medium	Low	Low	Medium	Low	Low	Low	Low	Low	19	Low
20 Chemicals, rubber, plastic	High	High	High	Medium	Low	Low	Low	Medium	Medium	Low	Medium	Low	6	Medium
21 Petroleum, coal products	Medium	Medium	Medium	Low	Low	Low	Low	Low	Medium	Low	Low	Low	20	Low
22 Metal products	High	High	High	Medium	Low	Low	Low	Low	Low	Low	Medium	Low	9	Medium
23 Non-metallic minerals	Medium	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low	20	Low
24 Motor vehicles & transport equipment	Medium	High	High	High	High	Low	High	Low	Low	Medium	Medium	Low	2	High
25 Machinery	Medium	High	High	High	High	Low	Medium	Low	Low	Medium	Medium	Low	3	High
26 Electronic equipment & other manufacture	Medium	Medium	Medium	High	Low	Low	Low	Low	Low	Low	Low	Low	16	Low
27 Electricity	Medium	Medium	Low	Low	Low	Low	Low	Low	Medium	Low	Low	Low	25	Low
28 Utility (construction, water)	High	High	High	Medium	Medium	Low	Low	Low	Low	Low	Medium	Low	8	Medium
29 Transport	High	High	High	Medium	Low	Low	Low	Low	High	Low	Medium	Low	6	Medium
30 Communication and business services	High	High	High	Medium	Medium	Low	Low	Medium	Low	Low	High	Low	4	High
31 Financial services and insurance	High	High	High	Low	Low	Low	Low	Low	Low	Low	Low	Low	16	Low
32 Recreational and other services	High	High	High	Medium	Low	Low	Low	Low	Low	Low	Medium	Low	9	Medium

Source: Prepared by the study team.

4. **Dairy** products are another relatively important sector in both Australia and the EU, and the FTA is expected to have a strong impact particularly in the EU, with bilateral exports expected to increase by almost 50 percent; this change in trade patterns also has consequences regarding the social, human rights and environmental sustainability. The sector has also been highlighted by several stakeholders as being important in the negotiations, citing issues such as Geographical Indications, treatment of subsidies, and threat of increasing import competition as important issues to be addressed.
5. **Communication and business services** are an economically important sector in both Australia and the EU, and the FTA is expected to have a substantial effect on bilateral trade, with already relatively high exports anticipated to increase for both Parties. A specific focus will be placed on professional services, which are part of this sector, and which were mentioned by stakeholders/negotiators to be of interest due to the market access issues and other issues (such as digital trade) being discussed during the negotiations.

## V.2 Case study selection proposal

### Case study selection methodology

In addition to the sector selection, an important feature of the SIA is that we also look at case studies. As indicated in the previous sections, we will spread the case studies across the report linking them to where they fit best in the structure (e.g. a case study that is horizontal (economy-wide) will be placed in the general analysis chapter while a case study linked to a sector in the sector-specific part).

The more focused case studies will also allow us to go beyond the modelling results and delve more in depth into potential challenges related to the FTAs, such as regulatory issues, and how the various measures considered might impact them. In our proposal we offer to carry out six case studies, spread across the different sustainability pillars.

<sup>91</sup> For the avoidance of doubt, note that criteria 2 and 3 only assess the anticipated economic, respectively non-economic impact of the modernisation of the FTA on a sector, not the overall impact which sectors have on the economy/social fabric/human rights/environment.



For each of the case studies we intend to cover the following elements:

- Description of the specific issue under investigation in the case study;
- Description of the background/context of that specific issue in the EU and/or Australia;
- Quantitative and qualitative assessment of the specific issue;
- Key takeaways and insights regarding the specific issue;

A case study will be limited to 2 pages maximum in size.

The selection criteria for the case studies are different from the ones for the sector selection, because case studies are meant to highlight specific aspects of interest for the negotiations, without being relevant across the economy, relevant for multiple sustainability pillars or significant economically.

The criteria for the case study selection are the following:

- Civil society suggestions and inputs for case study topics;
- Relevance for one or more sustainability pillars;
- Specific/narrow economic effects;
- Relevance for the negotiations.

Compared to the sector selection methodology described in the previous section, the weight of importance of stakeholder consultations is higher for the case study selection because the case studies illustrate and focus the study into directions that do not come out a priori from the quantitative analysis.

Immediately after the Kick-off Meeting (16 January 2019) of the project, we have reached out to stakeholders in Australia and the EU to get their inputs into potential case study topics by asking for detailed issues the SIA should focus on. We have repeated this invitation at the Civil Society Dialogue (4 April 2019). Following the outreach to stakeholders in the EU and Australia, we have received 25 responses. Some of them indicated that there were no strong suggestions at this stage, while other submissions pointed to different topics for case study analysis.

The suggestions received have been considered and evaluated against the above-mentioned criteria, as well as, crucially, the probable causal nexus between the FTA and the proposed topic.

### ***Case studies proposed for in-depth analysis***

The screening has resulted in the below list of case studies. As with the sector selection, to ensure that the selected case studies cover a minimum level of variety and representativity across the economy and social landscape, we also factor in that gender and SME issues are adequately reflected, and that each of the sustainability pillars is included in at least one case study.

- **Sugar and water quality**, although not ranking among the top-5 economic sectors or being affected in a major way by the FTA, would be interesting to study due to the potential environmental impact that could be caused by the predicted increase in Australian output. From an environmental perspective, sugar cane farming in Queensland is one of the main contributors to water pollution via fertilizer run-off that is released into the catchment areas of the Great Barrier Reef. This puts pressure not only on water quality but also on biodiversity as coral decay is accelerated. With sugar output and exports expected to grow under the FTA, further analysis of these effects is warranted.
- **Wine**, as a subsector to 'beverages and tobacco', is suggested as a case study topic because of the competitiveness effects of the FTA on this sector – with both the EU and Australia having globally competitive and renowned wine industries. Also, the issue of geographical indications was mentioned as a reason for deeper investigation.
- **Textiles labelling and rules of origin** is interesting because of the impact of a technical issue on market access for a specific industry, even if it is not one of the



largest sectors impacted. We will look at what the primary and secondary impact is of adjusting rules of origin and Australian labelling rules.

- **Access to critical raw materials: lithium battery value chain** looks at access to lithium and other minerals important for battery development (and thus decoupling from fossil fuels). This is an issue that is not related to a specific sector or one material, but one that matters for sustainability.
- **Iron ore mining** looks at the impact of the EU-AUS FTA on the iron ore mining industry and what sustainability effects mining has. What happens to total mining and what are relative export changes stemming from the EU-AUS FTA, as well as what are potential human rights and environmental effects.
- **Biodiversity and conservation:** what are the effects of the EU-AUS FTA on Australian management of endangered species and conservation?



## **ANNEX VI: CONSULTATIONS REPORT**

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## 1 INTRODUCTION

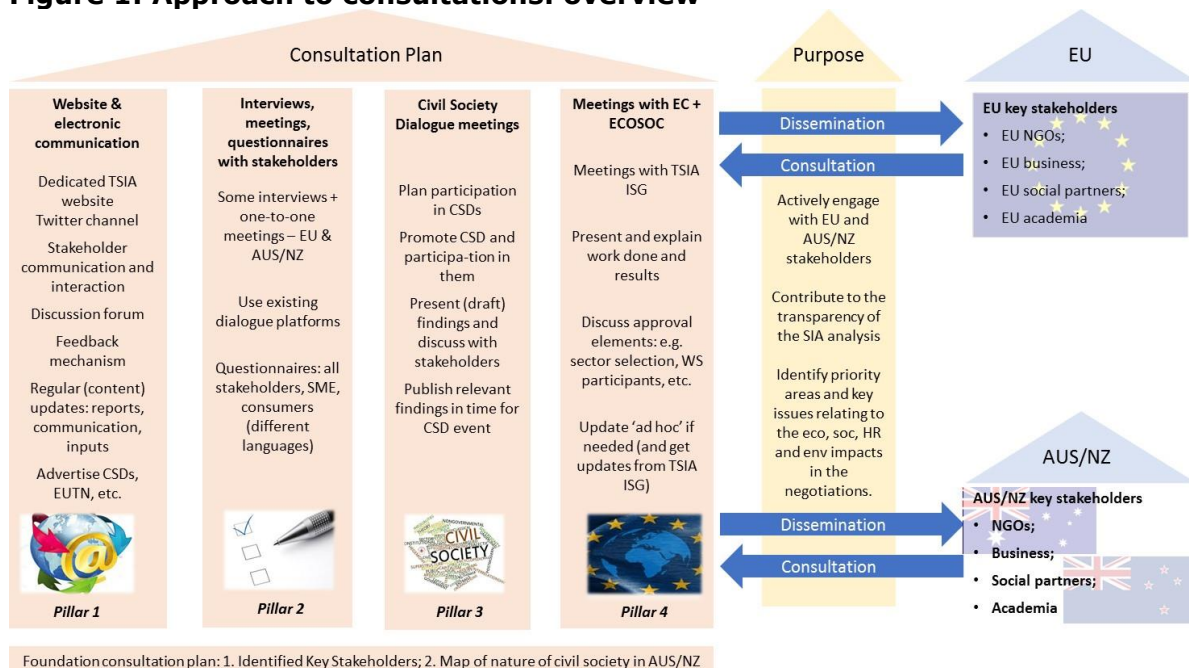
The objectives of the consultations, as specified in the ToR (see p. 18), were:

- to actively engage with all interested parties in order to reflect their experience, priorities and concerns;
- to contribute to the transparency of the SIA analysis;
- to help identify priority areas and key issues relating to the possible economic, social, environmental and human rights impacts in the negotiations.

To achieve these objectives, the consultations comprised four main pillars (Figure 1):

- Pillar 1: Digital engagement with key stakeholders: website and other channels, and dissemination of (draft) results and inputs;
- Pillar 2: Interviews, meetings and surveys with key stakeholders, and dissemination of (draft) results and inputs;
- Pillar 3: Civil society dialogue (CSD) meetings, and dissemination of results and inputs;
- Pillar 4: Meetings with EC officials.

**Figure 1: Approach to consultations: overview**



Consultation and communication activities have been undertaken in line with the consultations plan presented in the inception report. While key findings from the consultations are presented in the main SIA report, this consultations report presents more details about the implementation and findings from the study team's engagement with stakeholders. Section 2 describes implementation aspects for each of the four consultation pillars, and survey results and findings are presented in section 3.<sup>1</sup>

<sup>1</sup> It is important to note that in this report, survey responses are reported on in summarised form, and arguments made by stakeholders are not further discussed – this is done, where required, in the main report. Also, contributions made through position papers are separately reported in this report.

## 2 IMPLEMENTATION OF CONSULTATIONS AND COMMUNICATION ACTIVITIES

### 2.1 Stakeholder Database

Based on a definition of stakeholders as “those who are affected by, interested in or in any way related to negotiating, implementing and/or monitoring the trade and investment measures under negotiation, irrespective of their access opportunities to the consultations,” the first step in the consultations process was to identify the stakeholders in the EU and Australia that the team would approach and engage with during the study.

For practical purposes related to the structuring of the consultations as well as the interpretation of contributions, the following types of stakeholders have been distinguished:

- Private sector representatives (comprising companies, different types of business associations, and social partners);
- Civil society representatives (comprising non-governmental organisations, NGOs, community groups etc.) and think tanks/academia with interests in the economic, social, human rights, and environmental sustainability pillars; and
- Public institutions (comprising government, EU and other political institutions, agencies, and international organisations).

While an initial database of stakeholders was prepared during the inception phase – based on, for EU stakeholders, a review of past SIA reports and meetings, and lists of participation in recent CSD meetings held – this has been continuously updated during the course of the study.

In total, more than 400 stakeholders (organisational entities) have been included in the database, 96 in Australia and 314 in the EU. Annex B presents the list of stakeholders included in the database, and Table 1 provides a summary of the database composition by type of stakeholder in Australia and the EU

**Table 1: Composition of identified stakeholders in Australia and the EU (number of entities in database)**

Type of stakeholder	Number in Australia	Number in EU	Total number
<b>Civil society/Think Tank/Academia</b>	32	48	<b>80</b>
<b>Private sector</b>	46	215	<b>261</b>
<b>Public sector</b>	16	8	<b>24</b>
<b>Social partners</b>	2	43	<b>45</b>
<b>Total</b>	<b>96</b>	<b>314</b>	<b>410</b>

Note: Institutions which indicated during the consultations that they were not interested in the topic are not included in the table, nor listed in Annex B .

Source: Compiled by study team.

In order to reach out effectively and engage with stakeholders, including those in risk of being excluded an initial mapping of stakeholders was also undertaken during the inception period. This helped identify both the central stakeholders for the consultations (primarily those with a high level of interest in EU-Australia trade and investment, and its consequences across the sustainability pillars), and those that could be affected by the FTA but are in risk of being excluded from the consultations.

### 2.2 Pillar 1: SIA Website and Other Electronic Communication

The primary purpose of the website and electronic communication has been to ensure that any interested person can access relevant information on the SIA at any time. The use of

social media has also aimed at allowing stakeholders to provide feedback and discuss issues relevant to the SIA online.

### *2.2.1 SIA Website*

A website dedicated to the SIA was launched during the inception phase and continuously updated as the study progressed. The website address is:

<http://www.trade-sia-australia.eu>

The website has the following characteristics and functionalities:

- The front page provides a brief summary of the SIA (in all EU official languages), as well as a timeline for the study. Important news have been highlighted by using a slider, as well as by embedding the SIA Tweets;
- Three main sections allow easy access to information: One provides important information about the SIA and the sustainability dimensions ("about"); a document repository provides access to all study outputs: stakeholder contributions and other important documents and sources of information ("resources"); and a section providing information about the various consultation activities ("consultations");
- A "contact" section allows website visitors to leave feedback regarding the study and the website as well as register to be kept informed about the study development.

Website meta information (description, keywords and information for search engine robots) has been used to ensure that the website can be found easily on search engines.

### *2.2.2 Social Media*

Regarding social media, with the objective of increasing outreach it was agreed at the kick-off meeting with the ISG that the study would use the existing Twitter accounts of DG Trade and the EU Delegation in Australia to share relevant information about the study and its progress. Tweets have been posted at key stages of the study, e.g. to announce the publication of the draft reports and to inform about the start or imminent closure of the online surveys, or upcoming meetings.

### *2.2.3 Newsletters and email*

A number of email newsletters have been sent at critical points in the study – at an introductory stage, at the launch of the online survey, and a reminder shortly before the closure of the online survey. The recipient list numbers about 400 in line with the composition of stakeholders in the database. The opening rate of newsletters was around 30% of the overall recipients in the EU and Australia. Given this relatively low rate and the fact that email newsletters generated limited action by stakeholders<sup>2</sup> (presumably because many recipients delete "professional" email newsletters, despite personalisation), individual messages were also sent to all stakeholders, in many cases followed up by calls. Although being very resource-intensive, this generated more reactions by stakeholders in the form of survey submissions and interviews.

## **2.3 Pillar 2: Interviews, Meetings and Surveys**

The second pillar for engagement with key stakeholders has been via interviews, meetings and surveys; these are primarily aimed at obtaining information and views from stakeholders. The choice between the three different communication channels was determined by the type of information we expected to get. Thus, for more technical and sector- or issue-specific issues, interviews and meetings with targeted stakeholders have

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<sup>2</sup> The "click rate" (i.e. the share of recipients actually seeking more information on the SIA by clicking on a link in the newsletter) rarely exceeded 10%.

been held, whereas more general information, as well as information that is held by large groups of stakeholders, such as SMEs, has been obtained through surveys.

Interviews and one-to-one meetings with stakeholders in Australia and the EU were conducted in various forms – face-to-face, videoconference, phone, and written.

As planned, two online surveys were undertaken, with questionnaires available in English, French, and German. The first, general one, aimed at obtaining the views of a large group of non-specialist stakeholders, as well as associations and NGOs regarding all sustainability issues related to the FTA, including consumer issues. The second survey targeted businesses and aims at obtaining information on the potential impacts of the FTA on firms, in particular SMEs.

The online surveys were launched on the EU-Survey platform on 10 June 2019, and were initially open until 30 July 2019. This was later extended to 15 August 2019 in response to a relatively low number of responses.

A particular challenge for online surveys is to balance the desire for obtaining as much information as possible and the limited willingness of respondents to fill in long and complex questionnaires (and open questions). This has been addressed by reducing the number of questions that any individual respondent has to answer, by designing “smart” surveys, where responses provided to certain questions influence the selection of follow up questions. This aims at focussing the questions for an individual respondent on those topics in which he or she has shown interest.

The surveys were promoted through mailings, the SIA website, as well as through Twitter cross-postings. In addition, the team’s local experts reached out to stakeholders to disseminate the survey actively on the ground. Further, more in-depth contributions from stakeholders will be invited as part of the survey and by email.

## **2.4 Pillar 3: Civil Society Dialogue Meetings**

The third pillar of the consultation process focused on engaging with civil society in the EU in the context of DG Trade’s CSD, a system of regular meetings where civil society and the Commission discuss about EU trade policy issues. As planned, study progress and draft outputs have been discussed in one CSD meeting so far, which was held, as planned, in Brussels on 04 April 2019 to discuss the draft inception report. Documentation related to it – including the presentation, and list of organisations registered – is available from the DG Trade website.<sup>3</sup>

The next and final CSD meeting is tentatively planned for October/November 2019 in Brussels and will focus on the presentation and discussion of the draft final report.

## **2.5 Pillar 4: Meetings with the European Commission**

Engaging closely with the European Commission is the fourth pillar of the consultation process. This pillar is more “inward” oriented and of a coordinative nature, rather than outward oriented towards civil society and other key stakeholders.

Of the three scheduled meetings with the European Commission – through the SIA ISG – two have so far taken place: A kick-off meeting was held on 16 January 2019, and a meeting to discuss the draft inception report on 04 April 2019.

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<sup>3</sup> See: <http://trade.ec.europa.eu/civilsoc/meetdetails.cfm?meet=11534>.



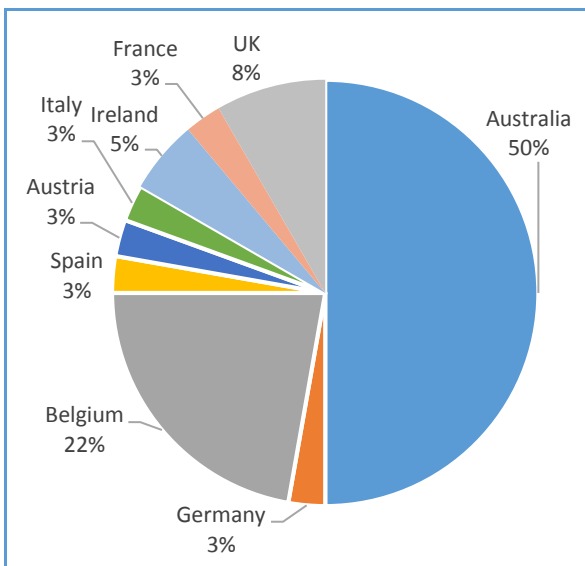
### 3 SURVEY RESULTS AND FINDINGS

This section presents the results of the two online surveys undertaken as part of the study, i.e. the general and business surveys. Contributions made through position papers and interviews have been reflected in the analyses presented in the main body of the report. We reiterate the caveat that in the present report survey responses are reported on, positions shared by stakeholders through position papers are presented but not further discussed – this is done, where required, in the main report.

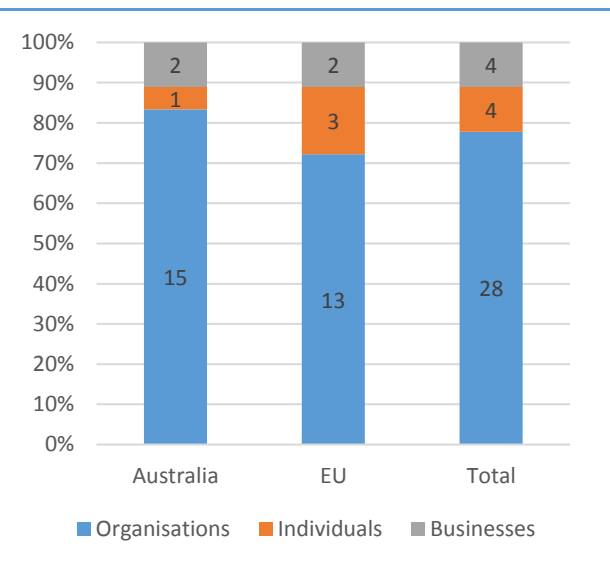
#### 3.1 Respondent Characteristics

In total, 36 respondents participated across the two surveys, of which 32 in the general one and 4 in the business/SME survey. Half of the respondents (18) are based in Australia, and the other half located in the EU, most of which in Belgium and the UK (Figure 2). 78% of respondents represent organisations, and 11% each businesses and individuals (Figure 3).

**Figure 2: Respondents by country**



**Figure 3: Survey respondents by type**



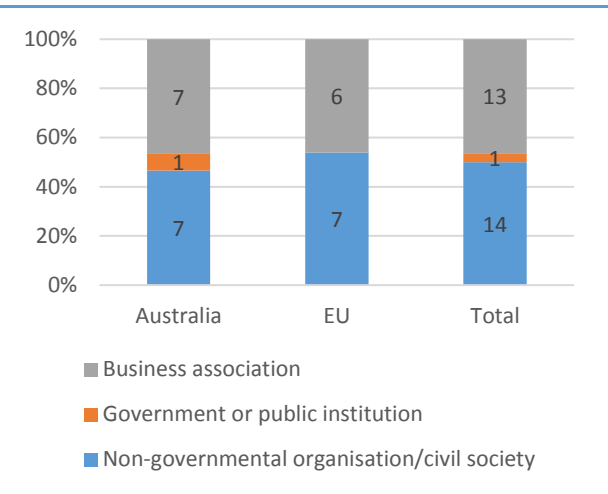
Source: Responses to online surveys; n = 36.

According to the self-assigned organisation type, both in the EU and Australia about half of the respondents are NGOs/civil society representatives, and the other half business associations (Figure 4).

In terms of the organisations' main interest across the four sustainability pillars, survey respondents in Australia and the EU showed a stronger focus on the economic issues related to the negotiations, followed by social aspects (Figure 5).

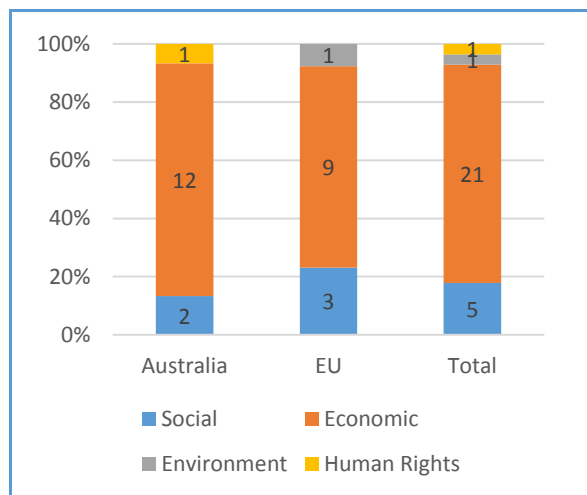
In terms of participation by gender, 17 responses (47%) were provided by women, respectively women led organisations and businesses (Figure 6).

**Figure 4: Responding organisations by type**



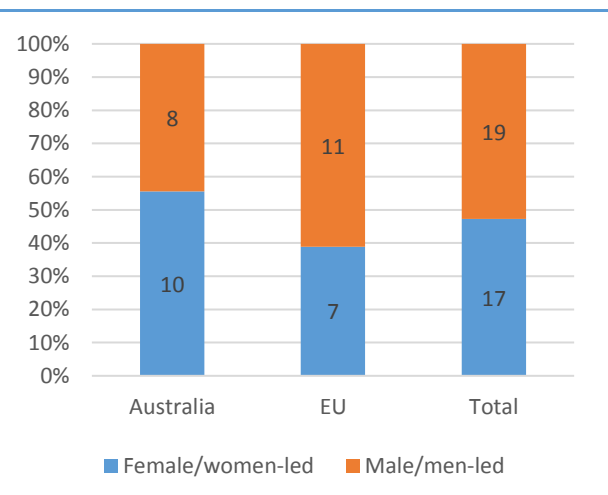
Source: Responses to online surveys; n = 28.

**Figure 5: Main type of interest among responding organisations**



Source: Responses to online surveys; n = 28.

**Figure 6: Survey respondents by gender**



Source: Responses to online surveys; n = 36.

Regarding the business survey, the number of responses was so low (4) that the survey findings are not representative. The four businesses participating in the survey were equally split between Australia and the EU (Belgium and Ireland). In terms of size, all corporate are small businesses (three with 10-49 employees, one with 10 or less). Only one of them has experience in EU-Australia trade, although accounting for a small share of turnover (less than 10%).

None of the four business respondents have a human rights policy in place, and all of them stated that there had been no incidences of human rights impacts arising from their operations.

### 3.2 Knowledge of the FTA Negotiations

All survey participants state that they have knowledge of the FTA negotiations of the FTA, and more than 80% in both Australia and the EU state that they have detailed knowledge about the negotiations (Figure 7). This high level of information about the ongoing FTA negotiations might indicate a self-selection bias, whereby primarily persons and organisations that have an interest in and knowledge of the Agreement participated in the survey.

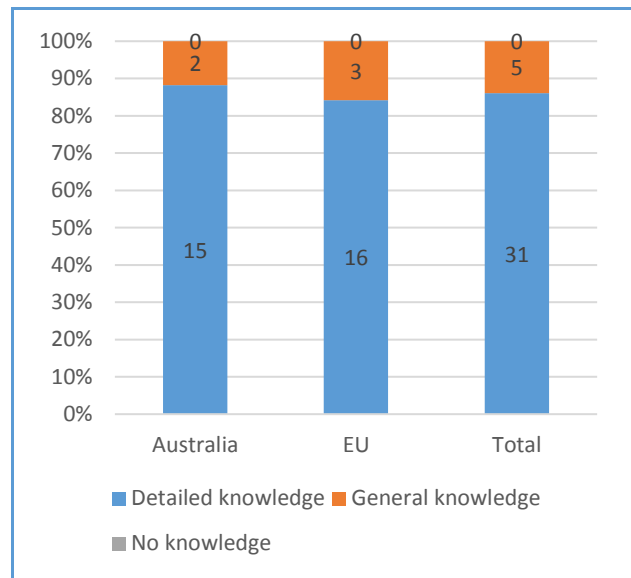
### 3.3 Views on Economic Effects

To determine survey participants' views on the anticipated economic effects of the FTA, the questionnaire included statements on various such effects and asked whether respondents strongly disagreed, somewhat disagreed, somewhat agreed or strongly agreed with the statement, or whether the Agreement would have no effect. These responses were then transformed into an index ranging from -1 (all respondents "strongly disagreeing" with the proposition) to +1 (all respondents "strongly agreeing" with the proposition), with an index value of zero indicating no or a neutral expected effect.<sup>4</sup>

The various economic effects as anticipated by respondents are presented in Figure 8, ordered from the most positive effects to the most negative (or rather least positive) ones. On average, all respondents combined expect positive effects of the new Agreement across the board, indicated by positive index values. The strongest positive effects are anticipated for the level of both-ways goods trade between Australia and the EU, effects for consumers in both the EU and Australia, and services trade. Conversely, the most limited positive effects of the new Agreement are expected for the incidence of corruption, good governance, and SMEs in Australia.

EU respondents are clearly more optimistic about the Agreement than Australian respondents. The largest differences in views are with regard to protection of intellectual property rights including geographical indications, which EU respondents consider as one of the most important benefits but where Australian survey participants see no benefit at all from the FTA, as well as the Agreement's effects on SMEs both in Australia and the EU. Australian respondents are also less positive about the potential of the Agreement to increase Australian exports to the EU.

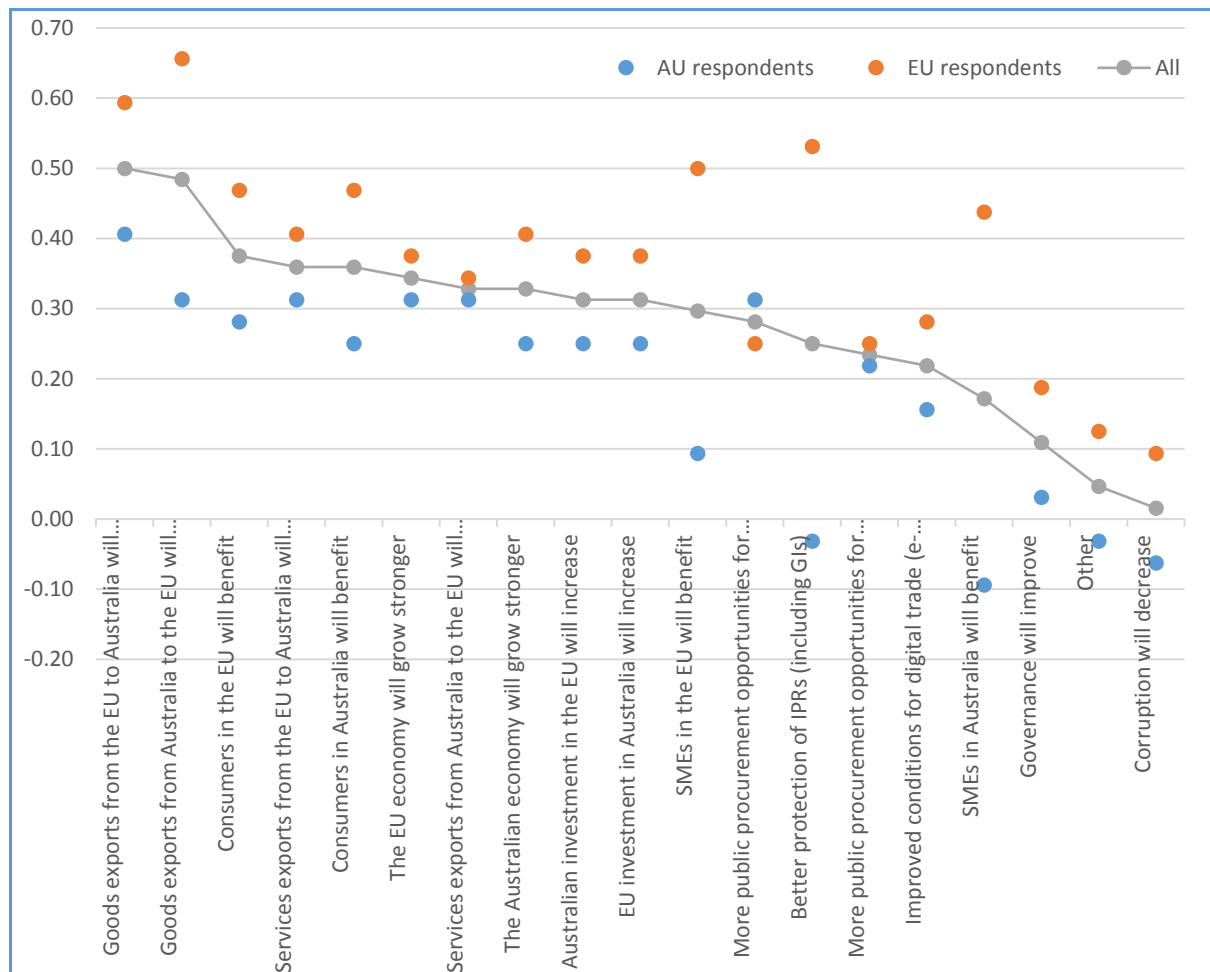
**Figure 7: Knowledge of the ongoing FTA Negotiation, by location**



Source: Responses to online surveys; n = 36.

<sup>4</sup> For the calculation of the index, values to responses were assigned as follows: "strongly agree" +2, "somewhat agree" +1, "no effect", "I don't know" or no response 0, "somewhat disagree" -1, and "strongly disagree" -2. These values were then aggregated across all responses and normalised.

**Figure 8: Expected economic effects of the FTA, by location of respondent (index)**



Source: Responses to online general survey; n = 32 (also see Table 2 in annex).

The "other" effects mentioned by survey respondents were the following ones:

- *At this stage it is not possible to anticipate the effects. From the consumer perspective there could be benefits but it will depend on the final provisions agreed by both sides. Given the proposals of the EU on the table, we think that it could lead to positive impacts. But it will depend to what extent Australia will support these proposals.*
- *Australia will send cheap goods to the EU and negatively impact on local producers*
- *Bilateral trade agreements rarely change the prevailing trading conditions due to embedding increased trade restrictions.*
- *Decreasing corruption in Australia is a key issue.*
- *Free Trade Agreements open opportunities for Australian exporters and investors to expand their businesses into overseas markets - and the Australia-EU Free Trade Agreement is no exception. The current AU-EU trade and investment relationship is substantial and the opportunity to improve red meat market access via a comprehensive, trade enhancing FTA is supported by the Australian industry.*
- *From the perspective of the innovative medicines industry in Australia, our experience with trade agreements is that they can have strongly positive impact on: exports, the economy, investment, small to medium business enterprises, consumers and the competitiveness of Australia's intellectual property framework. In particular, they offer the opportunity to better develop Australia's research, innovation and health care sectors. They are rare opportunities to secure: greater benefits from and resources for basic scientific research, including greater opportunities for collaboration and funding for the university and the broader research sector; greater inclusion in the conduct of global clinical trials which increases investment and provides better early access to Australian patients; harmonised and more efficient global regulatory frameworks,*

*including for medicines, which reduce cost and speed patient access; a more World-competitive intellectual property framework for Australian innovation to secure additional investment in Australian ideas; and the overall impact of additional investment in the innovative medicines sector and resulting increases in medical research, development and commercialisation will increase demand for STEM skill related employment. Medicines are one of Australia's largest manufactured exports but are sold into a highly competitive World market. The Australian biotechnology sector is rich in potential to improve the health of Australians and patients around the World but seeks significant investment. Australia has an excellent research foundation but faces hurdles in relation to securing additional investment in global clinical trials. The considered elimination of duplication in our regulatory framework offers the opportunity to provide the sick with new treatments faster without compromising standards. An EU Australia free trade agreement offers the potential to help address these issues by creating a better framework for delivering greater investment and developing Australia strength as a home for innovative medicines. In doing this it would help secure better access for Australian patients and patients around the World.*

- *If the EU and Australia intend to go beyond TRIPs provisions, this could have a negative effect on equitable access to medicines, as it may limit access to cheaper generic medicines, particularly as one of the EU's major exports to Australia is pharmaceutical products.*
- *More freedom in trade with less restriction can only benefit both sides.*
- *Whether and to what extent consumers in the EU and Australia will benefit significantly depends on the design of the FTA. Consumers will only benefit if consumer protection standards are upheld and tangible benefits for consumers (such as roaming or online commerce) are agreed. Digital trade will benefit from the FTA if measures are taken to increase consumer confidence in digital commerce. These include, inter alia, rules on dispute resolution and recourse to defective products in online purchases from the EU in Australia (and vice versa). In addition, measures must be taken in the area of product safety to prevent EU consumers from receiving goods through e-commerce that are not in line with European product safety standards.*
- *There is potential for stronger protection of Australian consumers and incentives for businesses to move to global best practice through assimilation of General Data Protection Regulation*
- *The benefits or otherwise to the outcomes of the FTA are clearly contingent on the specifics of the agreement. However, the clear purpose of an FTA is to provide for opportunities for both parties and therefore positive responses are provided.*
- *The EU sugar sector is defensive with regard to the free trade negotiations with Australia. There is no material need to open up the EU market to Australian sugar import. Concerning the sugar sector in the outermost regions, the conclusion of the EU-Australia agreement could have an unfavourable and destructive impact on the economy of the ORs. Outermost Region are the only special sugar producer in the EU. The special sugar European market is a very small niche market of only 250 to 300 000 tons, less than 1.5 % of Europe's total sugar market, already widely open to third countries (over 70%). As Australia already produces special sugars for its own market and due to economies of scale, Outermost Region special sugar producers will never be able to compete on equal terms with Australian producers on its own market. Sugar sector is essential for the economy of the outermost regions, the only European producers of sugar cane. The European Union represents 95% of outlets for sugar cane produced in Reunion. It is vital that the Commission introduces the systematic exclusion of tariff lines for special sugars (1701 1390, 1704 1490, 1701 9100, 1701 99 90) from this agreement. It will also be necessary to ensure the integration of strict rules of origin to prevent the resale of special sugars from other countries as Thailand, the world's second largest sugar exporter.*
- *The evidence of the impact of neoliberal trade agreements on economic growth and job growth is ambiguous and they can contribute to economic inequality. In regards to intellectual property rights, we are concerned about that the extension of data protection monopolies on biologic medicines to the EU standard of 10 years. Australia*

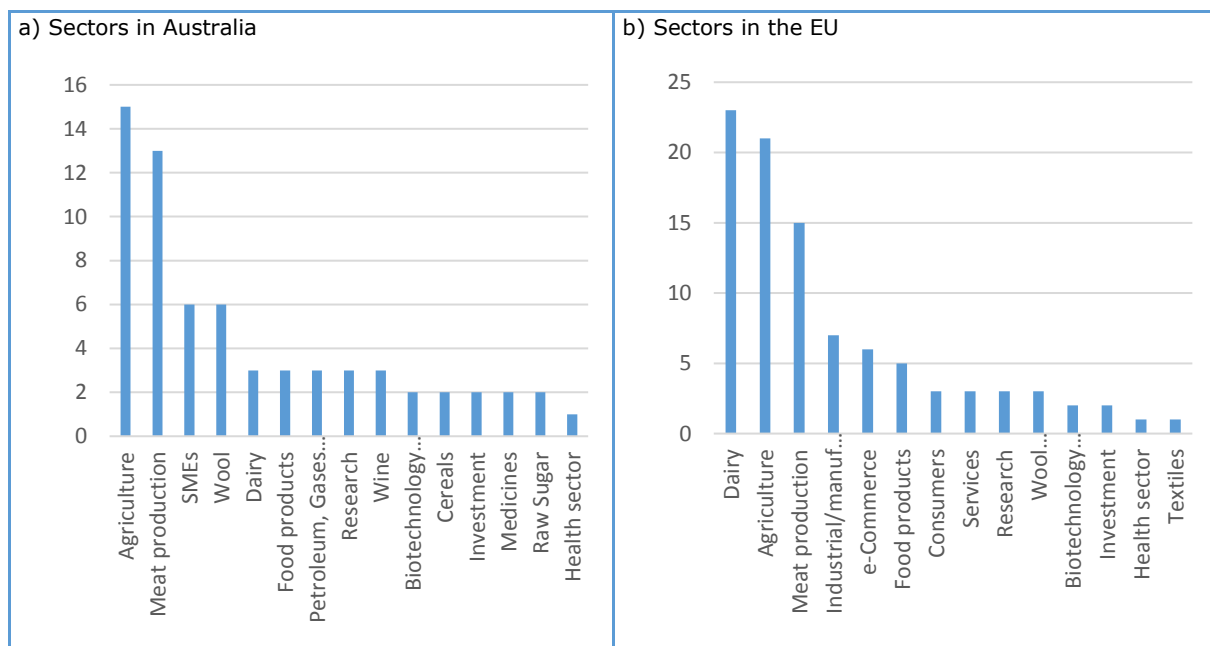
currently has five year monopolies and any extension could delay the availability of cheaper medicines and increase the costs to the public health system.

- GI protections will raise perceived IP rights for EU producers, in direct proportion to the amount that they will damage and infringe the IP rights of Australian producers being targeted.
- Trade barriers in Australia are already low, and Australia has had an industrial goods FTA with Europe for a decade now. So I don't expect the FTA to have much effect on economic growth, although the investment chapter may see an increase in EU investment in Australia and EU participation in Australian government procurement may grow. Intellectual property rights will probably be enhanced. It is possible that governance will improve in Australia, in the sense that the political/cultural influence of the EU is likely to raise standards and practices within Australia e.g. genuinely useful consumer labelling, mandatory impact assessments etc.

To determine which **sectors** are considered as most influenced by the new FTA, survey participants were asked to name the three most influenced sectors in an open question. From the sectors mentioned, a ranking of sectors was prepared using a simple score whereby the 2<sup>nd</sup> most influenced sector is weighted double the 3<sup>rd</sup> most influenced one, and the most influenced sector triple (see Table 3 in annex).<sup>5</sup>

The results are shown in Figure 9. Both in the EU and in Australia, agriculture, meat production and the dairy sector are among the most influenced sectors.

**Figure 9: Sectors seen as most influenced by the new FTA (score)**



Source: Responses to online general survey; n = 32 (see Table 3 in annex).

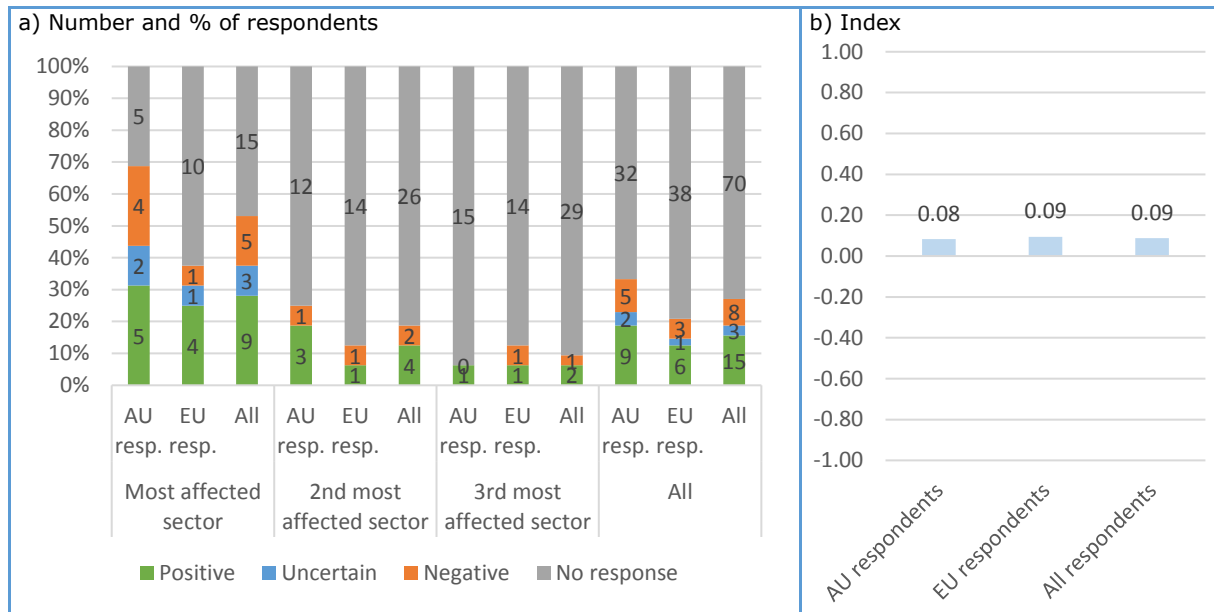
In terms of the direction of the effect – i.e. whether sectors are expected to be affected positively or negatively – respondents in both Australia and the EU expect a more positive impact of the FTA on sectors in the EU (Figure 10 and Figure 11). This is depicted in the constructed index (Figure 10b and Figure 11b),<sup>6</sup> which is clearly positive for the expected

<sup>5</sup> Score value = 3 \* number of responses under "most influenced sector" + 2 \* number of responses under "2<sup>nd</sup> most influenced sector" + 1 \* number of responses under "3<sup>rd</sup> most influenced sector"

<sup>6</sup> Index value = number of responses expecting a positive effect – number of responses expecting a negative effect, applying the weighting of 3 (most affected sector) / 2 (second most affected sector) / 1 (third most affected sector), divided by 6. Index values range from -1 (all responses expect negative effect) to +1 (all responses expect positive effect).

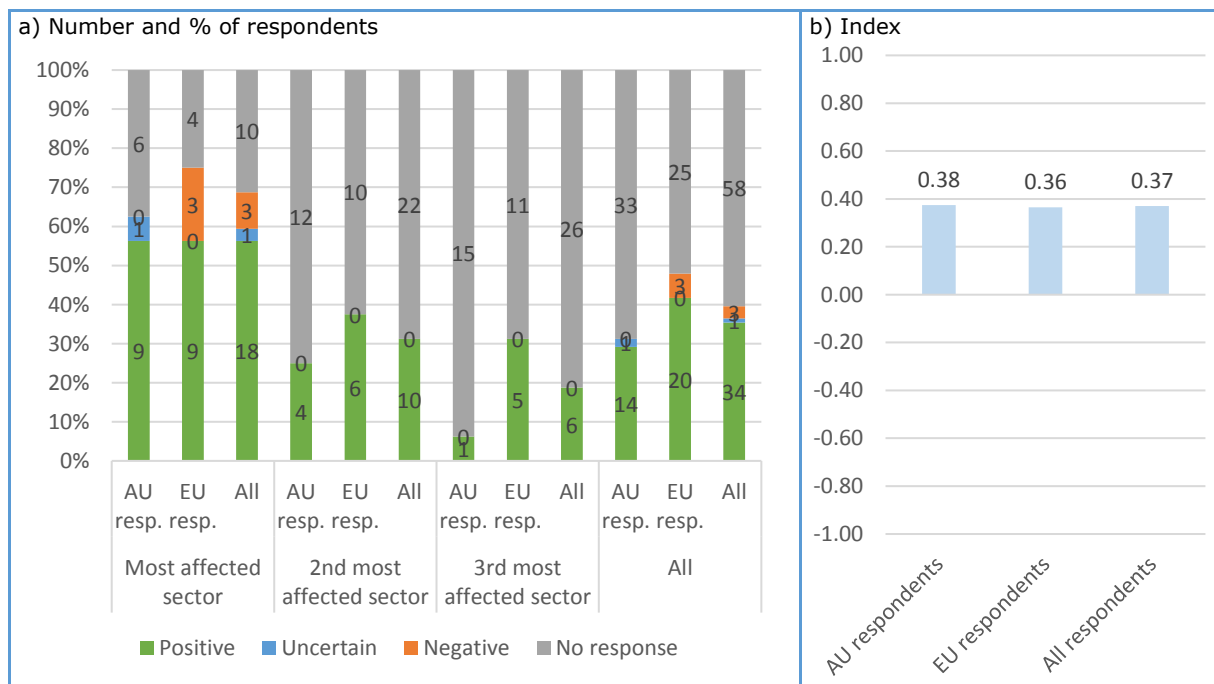
effects on sectors in the EU (+0.37) but only marginally positive for the impact on sectors in Australia (+0.09).

**Figure 10: Expected direction of the FTA's sectoral effects in Australia**



Source: Responses to online general survey; n = 32.

**Figure 11: Expected direction of the FTA's sectoral effects in the EU**



Source: Responses to online general survey; n = 32.

In the business survey, the effect categories were slightly different, focussing on the potential impacts of the Agreement on SMEs in Australia and the EU. Here, respondents expect the Agreement to have an overall positive impact on SMEs in both the EU and Australia. Businesses were also asked how they see the impact of the new Agreement on themselves. The perception is clearly positive, with only one respondent in the EU being uncertain about the overall effects of the FTA on SMEs.

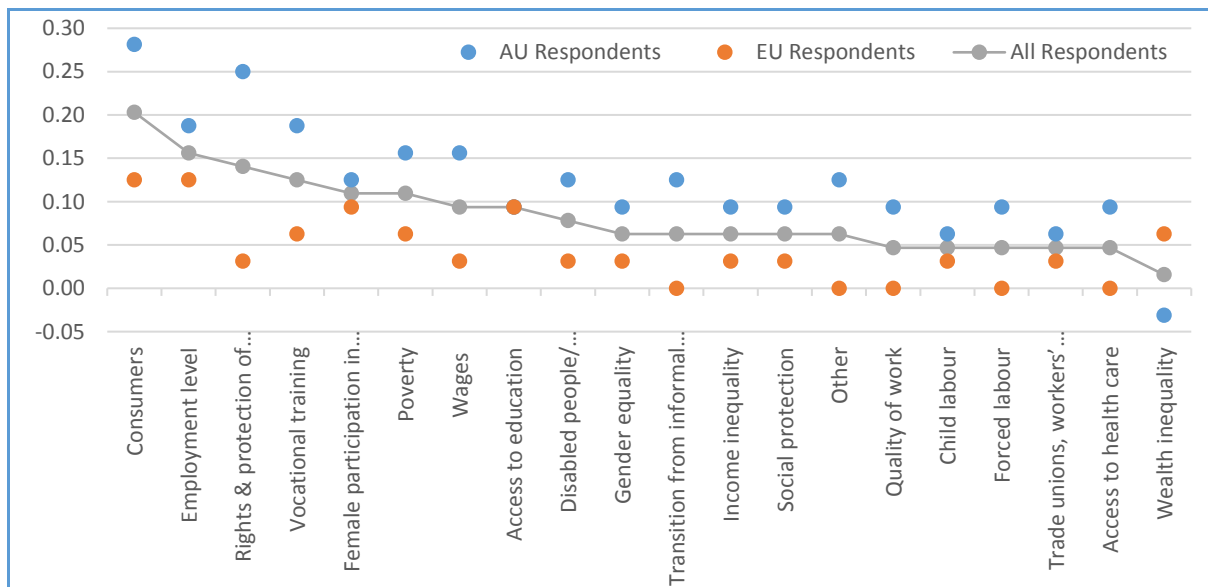


### 3.4 Views on Social Effects

To determine survey participants' views on the anticipated social effects of the new FTA, the questionnaire listed various social indicators and asked whether the Agreement's effect on each would be "very positive", "somewhat positive", "somewhat negative" or "very negative", or whether there would be no effect. These responses were then transformed into an index ranging from -1 (all respondents expecting a "very negative" effect) to +1 (all respondents expecting a "very positive" effect), with an index value of zero indicating no or a neutral expected effect.<sup>7</sup>

The responses show a generally positive perception of the Agreement's effects in **Australia** across all types of social indicators, with varying degrees (Figure 12). The most limited/neutral effect is expected for wealth inequality. Conversely, the strongest positive effect of the Agreement is anticipated for consumers, employment levels, and the rights and protection of migrant workers. Generally, EU respondents have a more sceptical view, expecting no or rather limited social impact of the Agreement in Australia. This result may appear slightly puzzling, as EU respondents were more positive than Australian ones regarding the expected economic effects. However, it should be noted that a significant share of responses to each type of effects of the FTA was "I don't know", and it therefore appears that different respondents provided answers to the various types of effects. In essence, questions on economic effects were mostly answered by business representatives, and questions on social and other non-economic effects by civil society representatives.

**Figure 12: Expected social effects of the FTA in Australia, by location of respondent (index)**



Source: Responses to online general survey; n = 32.

Additional comments made with regard to the potential social effects in Australia of the FTA include the following ones (literal quotes):

- *A trade agreement between the EU and Australia offers the potential to positively impact on a wide range of socio-economic issues. Increase investments in the Australian innovative health care sector including in universities, research organisations, biotechnology companies and pharmaceutical companies offers real benefits in terms of employment and wages. The sector is characterised by high-level, tertiary research, administrative and marketing type employment or advanced-secondary, manufacturing type employment characterised by high wages and good conditions and the highest quality of work. The contribution of this broader sector to*

<sup>7</sup> See the calculation of the corresponding index of the Agreement's economic effects in section 3.3 above.

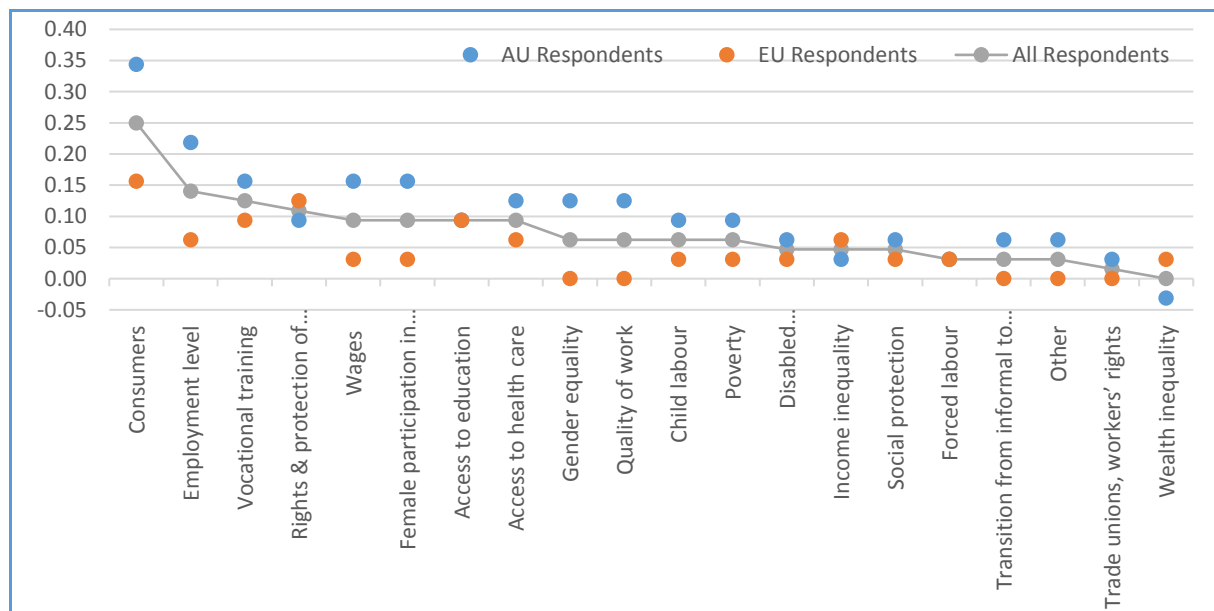


*female workforce participation is very strong. The innovative health care sector in researching, developing, commercialising and distributing innovative medicines is absolutely fundamental to the health and improving healthcare of Australian consumers. There is no access without investment. Each of these elements – good jobs, fair workplaces, new medicines and access to healthcare, combined with tax revenues are very strong factors in mitigating poverty.*

- *We have serious concerns about the impact of proposed EU pressures on Australia for intellectual property on pharmaceuticals and Australia's ability to ensure good quality access to medicines.*
- *Australia is already a high standard economy and we comply with a number of international treaties including the ILO Core principles.*
- *From the Australian perspective most of these issues are well covered by existing laws and standards. The FTA will provide economic opportunity which over time will improve socio-economic standards in both Australia and the European Union.*
- *The social effects depend on the details of the agreement as to whether any of these outcomes are realised.*
- *Other effects refer to public health, for which the outcome is uncertain, and dependent on the contents of the detail. However, we believe that the EU-Australia deal has the potential to present a gold standard for public health-coherent trade, as both sides have strong protections in the area of public health, which should be included in a legally-binding, ambitious way.*
- *The impact of GIs on Australian consumers will be extremely negative, due to confusion of new product names.*

Similar social effects of the Agreement are expected in **the EU** (Figure 13). The strongest positive effect of the Agreement is anticipated for consumers, employment levels, and vocational training. For most other social aspects, the effects are expected to be limited.

**Figure 13: Expected social effects of the new Agreement in the EU, by location of respondent (index)**



Source: Responses to online general survey; n = 32.

Additional comments made with regard to the potential social effects in the EU of the FTA include the following ones (literal quotes):

- *Australia is such a marginal exporter to Europe that the effects of an FTA will be barely felt. Nor is EU much influenced by socio-economic models of other jurisdictions, much preferring their own way of doing things.*
- *From the Australian perspective our views are constrained with respect to the impact on European socio-economic indicators. It appears most of these issues are well*

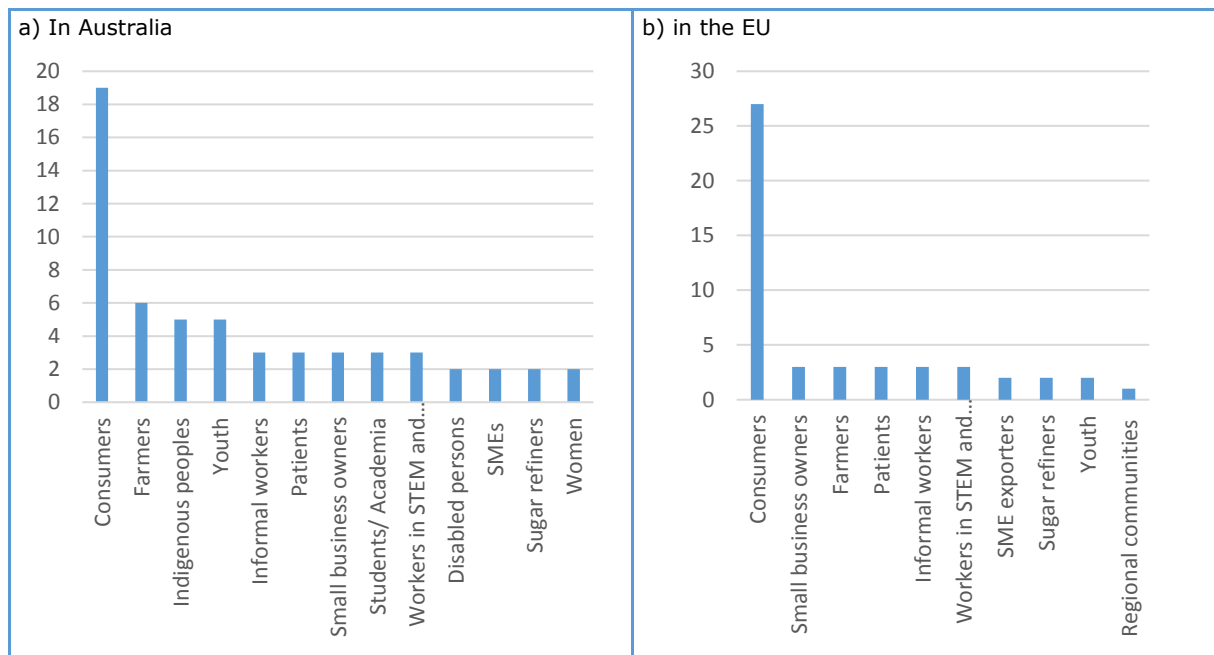
covered by existing laws and standards. The FTA will provide economic opportunity which over time will improve socio-economic standards in both Australia and the European Union.

- The extent to which the situation of consumers is positively or negatively affected depends largely on the specific form of the FTA. For a positive impact, the following points are relevant: 1. Consumer protection should be listed as a primary objective in the preamble to the agreement. 2. The agreement should include a separate chapter on "Trade and Consumer Protection". It should specify how consumers can be protected and how they can benefit from the FTA. This is possible, for example, by setting the EU precautionary principle and by agreeing on concrete benefits for consumers in the telecommunications and e-commerce sectors. 3. "Consumer protection" should be included as a justification for derogations from FTA provisions, thus codifying the "right to regulate" for the protection of consumers. 4. Regulatory cooperation is needed, which is regulated outside the FTA and is voluntary. 5. Investment protection should be limited to national treatment provisions, and ISDS or ICS procedures should be waived.
- Social effects depend on the details of the agreement as to whether any of these outcomes are realised.
- Other effects refer to public health, for which the outcome is uncertain, and dependent on the contents of the detail. However, we believe that the EU-Australia deal has the potential to present a gold standard for public health-coherent trade, as both sides have strong protections in the area of public health, which should be included in a legally-binding ambitious way.
- There could be benefits for consumers, again depending on the final provisions agreed. On prices: even if tariffs would be fully eliminated, the reduction of prices will not be automatically passed through to consumers. It will depend on various factors such as the competitive pressure on the market. The question is: will businesses pass on the benefits to consumers? A trade agreement cannot alone lead to that. But competition authorities on both sides could monitor the impacts and draw conclusions. The same logic applies to consumer choice and quality. On safety: if the EU and Australia manage to conclude an administrative arrangement to exchange information on dangerous products, this could increase consumer safety. It will be even more impactful if both sides can convene joint recall activities. But this is a process that needs to happen outside of the trade agreement framework and be led by regulators such as DG Justice, not by trade officials. The objective needs to remain to protect consumers first while liberalising trade and not the other way around. If the proposed EU provisions on consumer trust online is agreed by Australia, it could lead to a better information for consumers and easier access to redress if something goes wrong. This must however go hand in hand with an increased cooperation between market surveillance and enforcement authorities in parallel. In addition, there could be benefits for consumers with regards to telecom prices if ambitious provisions are included in the agreement to promote transparency of costs and affordability.

To determine which **social groups** are considered as most influenced by the FTA, survey participants were asked to name the three most influenced groups in an open question. From the groups mentioned, a ranking of affected groups was prepared using the same formula as for the economic sectors (see Table 5 in annex and section 3.3 above).

The results for social groups influenced by the FTA are shown in Figure 14. Both in the EU and in Australia, consumers are considered as the social group on which the FTA will have the strongest effect by far. However, few survey participants provided a response, indicating that the scale of the impact on any social group is expected to be limited.

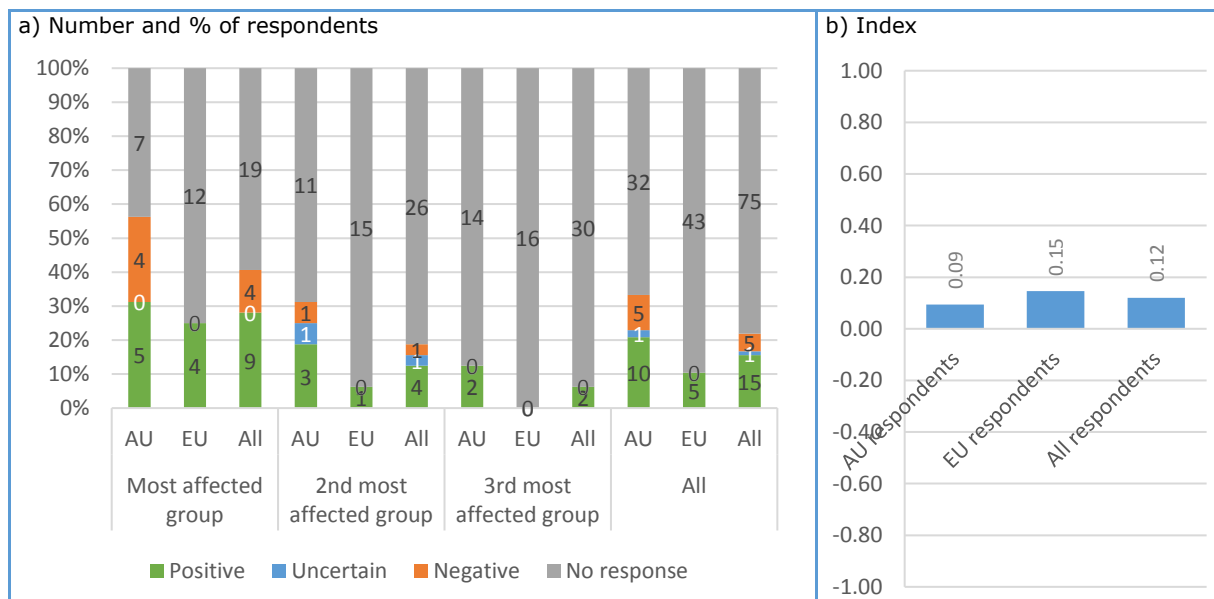
**Figure 14: Social groups seen as most influenced by the FTA (score)**



Source: Responses to online surveys; n = 32 (see Table 7 in annex).

In terms of the direction of the effect, i.e. whether social groups are expected to be affected positively or negatively, a majority of respondents in Australia and all respondents in the EU who answered the corresponding questions expect positive effects of the new Agreement on social groups **in Australia** (Figure 15a) – but most respondents did not provide any response, indicating, in line with the above observations, that the anticipated effects are limited. The constructed index, shows a positive but limited value (+0.12), indicating an overall expectation that the new Agreement will have, on balance, slightly positive effects on social groups in Australia (Figure 15b).

**Figure 15: Expected direction of the New Agreement's effects of social groups in Australia**

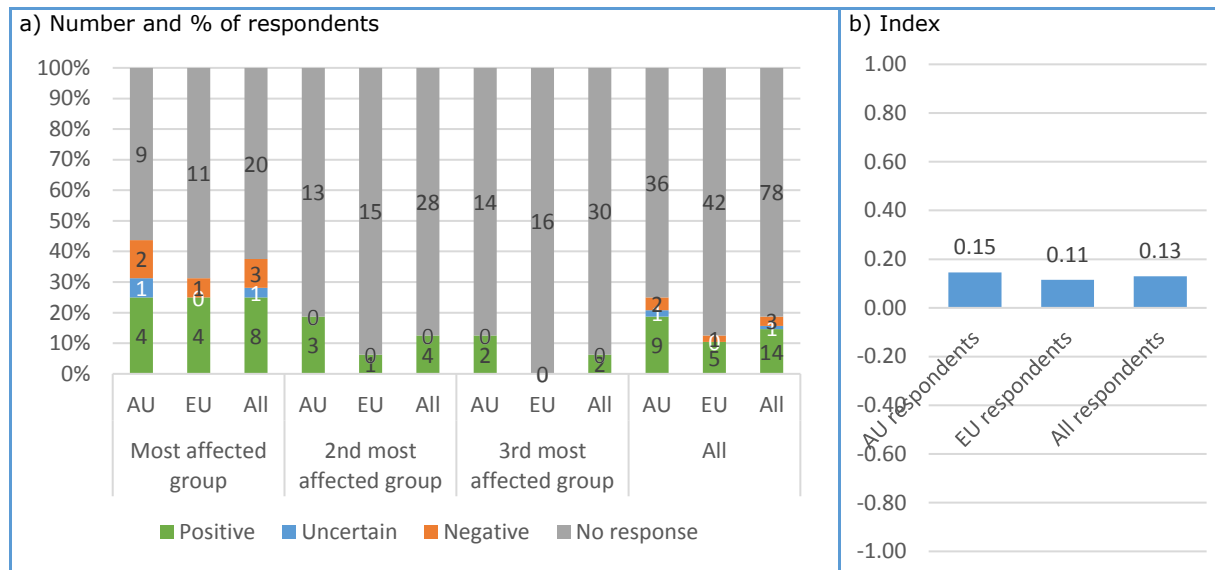


Source: Responses to online general survey; n = 32.

The pattern of responses regarding the direction of the FTA's effect on social groups in **the EU** is very similar (Figure 16). Interestingly, regarding the effects in both Australia and the EU respondents tend to be more optimistic with regard to the effects in the other

jurisdiction, i.e. Australian survey participants expected the stronger benefit for social groups in the EU, and vice versa.

**Figure 16: Expected direction of the New Agreement's effects of social groups in the EU**



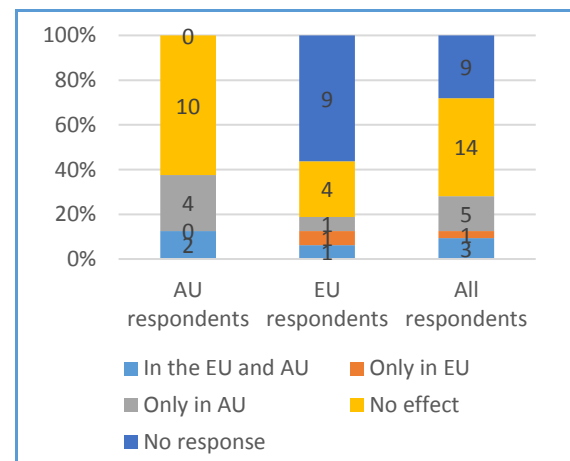
Source: Responses to online general survey; n = 32.

### 3.5 Views on Human Rights Effects

To determine the survey participants' views on the anticipated effects of the new Agreement on the enjoyment of human rights, a similar approach as for social effects was followed, except that in preliminary questions survey participants were asked whether they thought that the new Agreement would have any human rights impact in Australia, the EU or both (Figure 17), and whether they thought that the impact would be negative or positive (Figure 18). Most of the respondents do not expect the new Agreement to have any effect on human rights in Australia or in the EU.

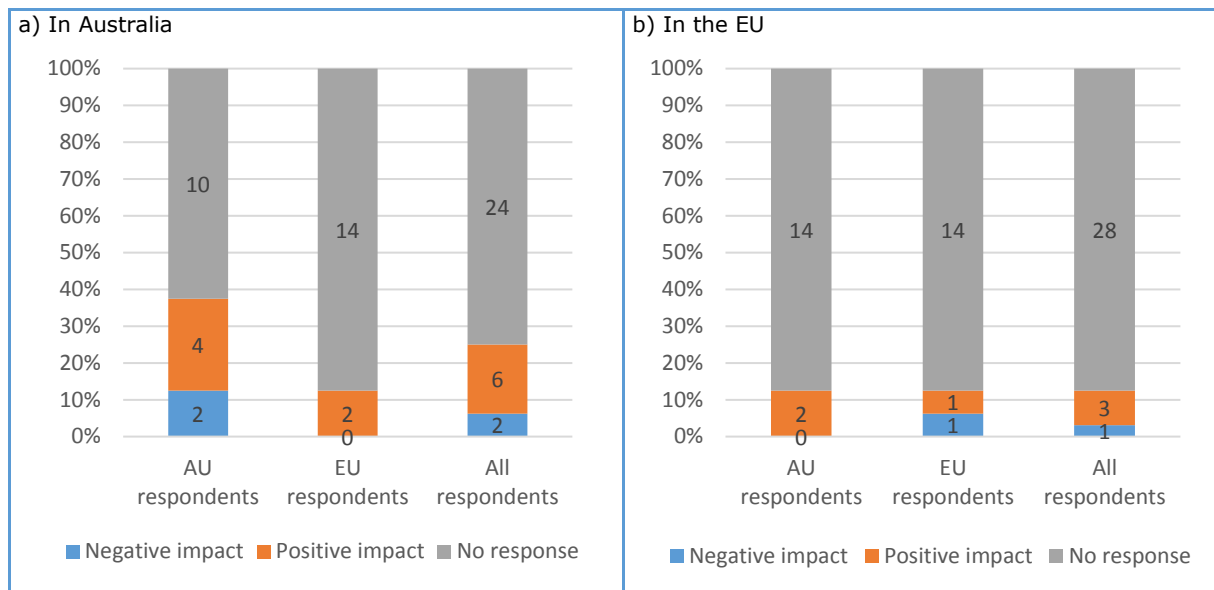
As only nine respondents expected any human rights impact, a more detailed statistical analysis of the survey with regard to any anticipated human rights impacts of the FTA cannot be undertaken.

**Figure 17: Expected human rights impact of the FTA in the EU and Australia**



Source: Responses to online general survey; n = 32.

**Figure 18: Direction of expected human rights impact of the FTA**



Source: Responses to online general survey; n = 32.

Nevertheless, respondents provided the following views on the potential human rights effects of the FTA (literal quotes):

- *A trade agreement between the EU and Australia would have a positive impact on the access to medicines of EU and Australian citizens, increasing research, development and commercialisation of innovative new medicines as well as via increasing regulatory efficiency and, thereby, speed of access for patients. Additional investment in the medicines industry and related sectors offers the potential to increase employment, economic activity and taxation revenues.*
- *As the markets for nuts increases in particular such products and Macadamia's grown in tropical areas with indigenous communities, more opportunity is provided to participate in the generated wealth increases.*
- *Closer co-operation between the two trading blocks will lead to best practice being developed and shared between all parties.*
- *Conditionality of FTA encouraging better governance (primarily treatment of asylum seekers).*
- *Europe has applied its human rights laws and standards for many decades now. While it is, of course, not perfect, the effects of this have really permeated through European commercial and social life. Australia has done much less. The negotiations with Europe and closer relations may cause a "migration" of better standards and practices to Australia.*
- *Potentially brings Australia into line with EU human rights framework by providing benchmarks and giving traction to policymakers who have not respected EU expectations regarding data protection*
- *The extension of monopolies on biologic medicines to match the EU standard of 10 years (Australia is currently 5 years) could delay the availability of cheaper medicines and increase the costs to the public health system. The EU has signalled in its conditions for the WTO Government Procurement Agreement that it wants to remove Australian provisions that allow federal and state governments to give preference for government procurement contracts to local SMEs, including those for indigenous enterprises. E-Commerce rules could restrict the government from regulating global digital companies. In the wake of Facebook and other data abuse scandals, we need stronger privacy and other protections for consumers.*
- *Closer co-operation between the two trading blocks will lead to best practice being developed and shared between all parties.*
- *Pressure on EU producers will lead to poor practices*

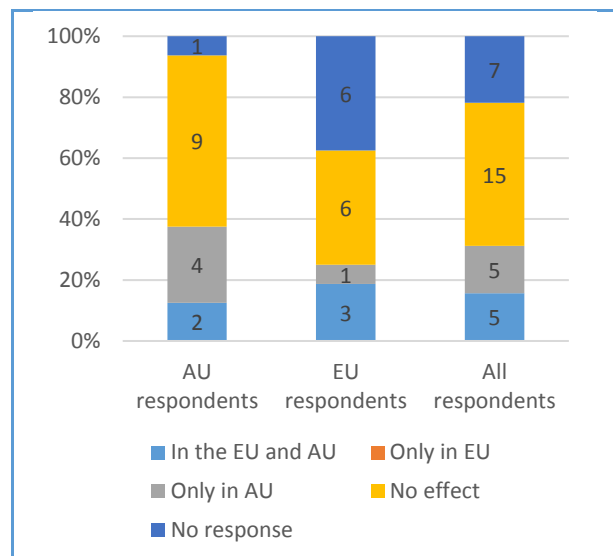
- *The potential positive effects all relate to the possibility of improvement through Europe's political/cultural influence e.g., increase in programs employing people with disability, perhaps improved response in Australia to modern-day slavery, increased possibility that Indigenous rights in Australia may be treated with more gravitas through Europe's influence, greater consumer rights and protection. I see Australia as the human rights beneficiary in this FTA. Australia should include a global provision similar to NZ's relating to Indigenous rights and measures to protect them. There is also a real risk to human rights through enhanced IP protection. Europe has some of the world's largest pharmaceutical companies (Bayer, Roche, Novartis, Sanofi, GlaxoSmithKline). The FTA will no doubt include the usual TRIPs Plus provisions, e.g. extension of monopoly rights. The PBS in Australia must be fully protected from erosion through the IP provisions. Also very important for the protection of human rights is the full protection of states' right to regulate, in relation to the investment chapter of the FTA. This protection clause must be drafted to have a wide scope, including all public interest state actions and measures. Finally, regarding ISDS, states' right to regulate cannot be adequately protected while there is continued use of stabilization clauses in contracts with foreign investors and while there are umbrella clauses in FTAs allowing such contract "breaches" to be taken to ISDS.*
- *As regional communities grow due to the strength of agricultural exports, indigenous communities also benefit.*
- *Greater transparency in line with EU regulations. Hopefully greater rights for indigenous peoples of Australia.*

### 3.6 Views on Environmental Effects

To determine survey participants' views on the anticipated environmental effects of the Agreement, the same approach as for social effects was followed, except that in a preliminary question, participants were asked whether they thought that the FTA would have any environmental impact in Australia, the EU or both (Figure 19). About 16% each of the respondents (a total of 10) expect effects to occur in the EU and Australia, respectively Australia only. Two thirds of all respondents expect no effect or provided no response.

The responses regarding questions on the Agreement's effects in the various environmental impact show that the respondents who answered this question (10) are rather critical. For Australia, on balance some net positive effects are expected regarding use of renewable energy and natural resource exploitation. For the EU, a positive effect is expected only for the former. The most negative effect expected in Australia is on GHG emissions, and in the EU on GHG emissions and water quality (Figure 20). Overall, however, it must be stressed that few respondents expressed a view, so that the reliability of these responses is limited.

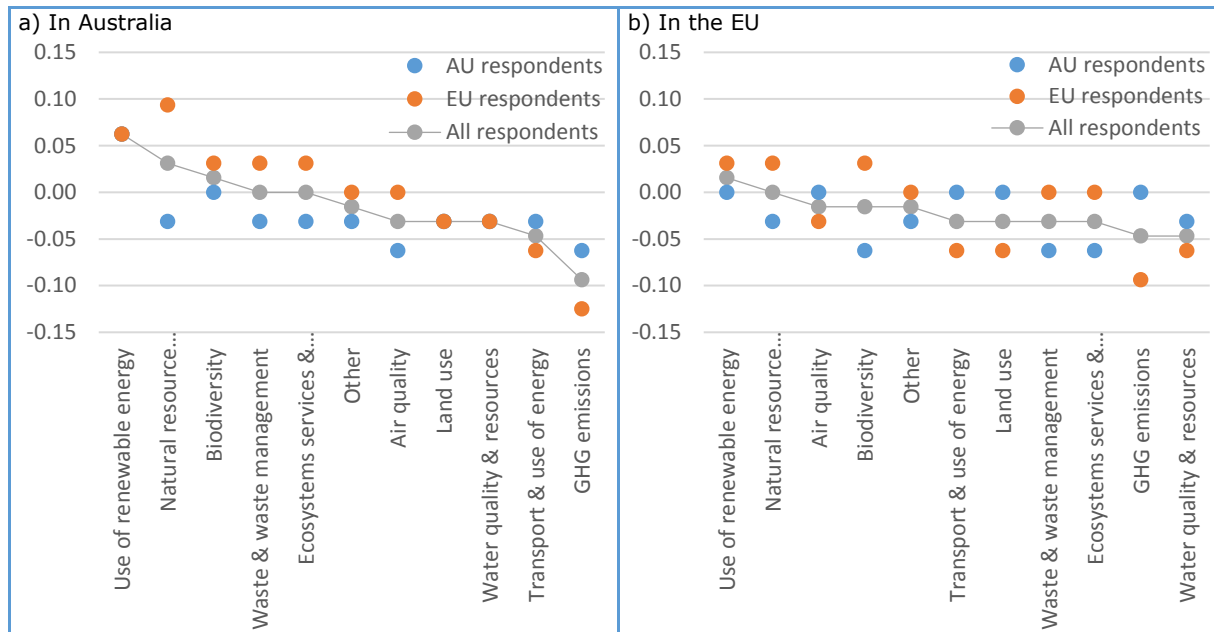
**Figure 19: Expected environmental impact of the FTA in the EU and Australia**



Source: Responses to online general survey; n = 32.



**Figure 20: Expected environmental effects of the FTA, by impact area and location of respondent (index)**



Source: Responses to online general survey; n = 32.

More interesting than the statistical analysis of responses might therefore be the responses to the open questions regarding environmental effects:

- *Environmental effects depend very much on how the FTA is understood and implemented. FTAs have typically emphasised facilitation of resource extraction/processing (incl. ISDS provisions) and eroded the effectiveness of jurisdiction-specific environment protection mechanisms. Australia might be encouraged to 'go green' by EU investors or might instead be exploited.*
- *If the agreement results in increased trade, this will necessarily result in increased emissions via fossil-fuel based transport, and concurrent impacts on air quality at least in the near future (2 responses).*
- *Provisions of trade in services that open up most services to privatisation and restrict the regulation of these services could prevent necessary government regulation to address climate change and other environmental degradation.*  
*The agreement should be subject to international environmental law, including both Parties commitments under the Paris Agreement and environmental standards must be fully enforceable through government-to-government disputes in the same way as other chapters in the agreement.*  
*The proposed Energy and Raw Material chapter could facilitate increased trade in fossil fuels and therefore contribute to increased levels of greenhouse gasses, which would be in contravention to both parties obligations under the Paris Agreement and would undermine efforts to address climate change.*  
*A detailed environmental impact assessment is required to assess the impact agreement's environment and climate change impact. Where provisions are found to have negative impacts they should be re-negotiated or removed from the agreement.*
- *Europe takes a much more comprehensive and coherent approach to sustainability, so I would hope that its political and cultural influence through the negotiations and through closer relations will influence Australia for the better. The FTA should include and positively encourage/support government procurement exceptions for renewable energy and environmental goods and services. Both Australia and Europe were inaugural parties to the negotiations on the WTO Environmental Goods Agreement and Australia in 2012 endorsed the APEC List of Environmental Goods. The current chapter on Trade and Sustainable Development proposed by the EU is far too weak on this point. The two states should include the salient terms from that proposed Agreement into the FTA.*

- *This proposed FTA is likely to further increase trade - or, at a minimum, increase trade opportunities - in animal agricultural products, including meat, egg and dairy products. The liberalisation of trade in animal products could therefore lead to an increase in intensive farm animal production, which is a significant contributor to the production of three most important greenhouse gases influenced by human activity. The animal agriculture sector also encompasses feed grain production, which requires substantial inputs of water, land, and energy. Intensive farm animal production is a leading driver of land degradation through, for example, overgrazing and feed-crop production, and is a key cause of deforestation. Industrial farm animal production also contributes to water scarcity and the pollution and degradation of water supplies. It is also a major contributor to eutrophication, soil acidification, 'dead' zones in coastal areas, degradation of coral reefs, human health problems and the emergence of antibiotic resistance. Regarding biodiversity and natural resources exploitation, the FTA has significant potential for the Parties to include ambitious provisions with regard to protecting wild species and their habitats (both terrestrial and marine). For example, strong commitments to combating both wildlife trafficking and IUU fisheries would have a positive impact on biodiversity and the protection of natural resources. CPTPP's Environment Chapter provides a good starting point with regard to the latter and the minimum level of ambition for this FTA.*

### **3.7 Preferences for Negotiation Issues**

Survey participants were asked to assign priorities to a number of negotiation issues. The responses were then transformed into an index following the same methodology, adapted as required, as for the ranking of anticipated effects; the index ranges from zero (no respondent considering the issue to have low or high priority in the negotiations) to one (all respondents giving high priority to the issue).

The responses are summarised in Figure 21 (distinguishing between EU and Australian respondents). The three issues considered most important overall by all respondents regardless of their location are the removal of remaining tariffs (index score of 0.74 on a scale 0-1), simpler rules of origin especially for SMEs (0.57), and the removal of TRQs for agricultural goods (0.51).

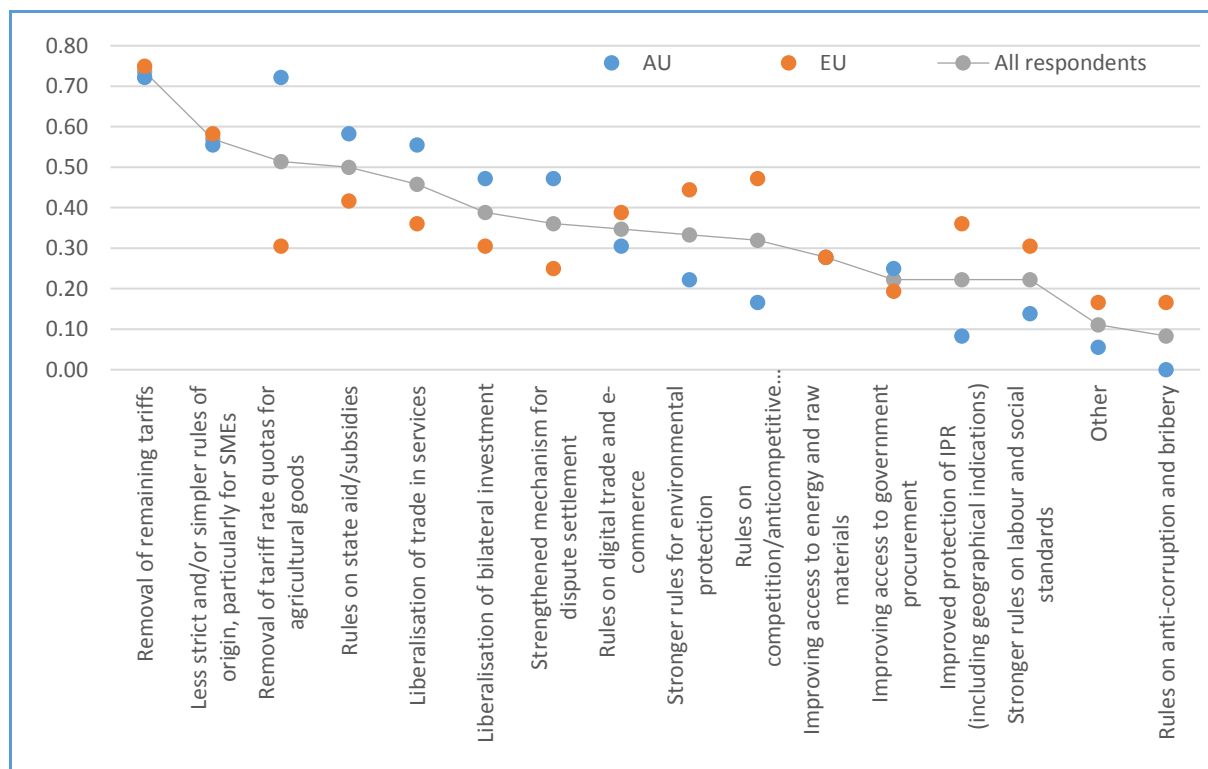
Preferences vary considerably between Australian and EU respondents for some issues. Thus, Australian respondents consider TRQs, rules on subsidies and state aid, services trade liberalisation, investment liberalisation and dispute settlement as more important than EU respondents. Conversely, for EU survey participants rules on competition, environmental protection, and protection of IPRs and GIs are more important than for Australian respondents.

Other negotiation issues mentioned by respondents include the following ones:

- *"Consumer protection" should be included as a justification for derogations from FTA provisions, thus codifying the "right to regulate" for the protection of consumers.*
- *Insurance against overly burdensome and restrictive trade measures included in the chapters.*
- *Public health & tobacco protection*
- *The Parties' approach to labelling of all sorts, incl. social and environmental labelling*
- *Fisheries subsidies and animal welfare: These issues should not be restricted just to the SPS or Regulatory Cooperation chapter, but there should be a section in the Sustainable Development chapter focusing specifically on addressing the impacts of industrialised farming on the environment and animal welfare.*



**Figure 21: Preference index for FTA negotiation issues, by location of respondent**



Source: Responses to online surveys (general and business survey); n = 36.

With regard to the key issues for the negotiations, the following ones were mentioned by respondents:

- *Improved trading arrangements for agricultural products (incl. removal of quotas, subsidies) (10 responses)*
- *Elimination of tariffs (5 responses)*
- *Sustainable development, particularly with regard to environmental protection, as opposed to an FTA benefiting only corporate profits (3 responses)*
- *Ensuring access to medicines in Australia. The EU should not pressure Australia to go beyond TRIPS on intellectual property (2 responses)*
- *Investment and movement of natural persons (2 responses)*
- *Need to realise, understand, acknowledge, respect different agricultural production systems and not impose regulations that dictate practices that should be undertaken on farms in both parties.*
- *Reduced corruption in Australia, particularly in the mining sector.*
- *There is no need to include stronger dispute settlement mechanisms as both partners have a strong independent court system.*
- *Regulatory cooperation*
- *Maintaining the level of consumer protection and the "right to regulate" for future regulatory measures in the interests of consumer protection and tangible benefits for consumers.*

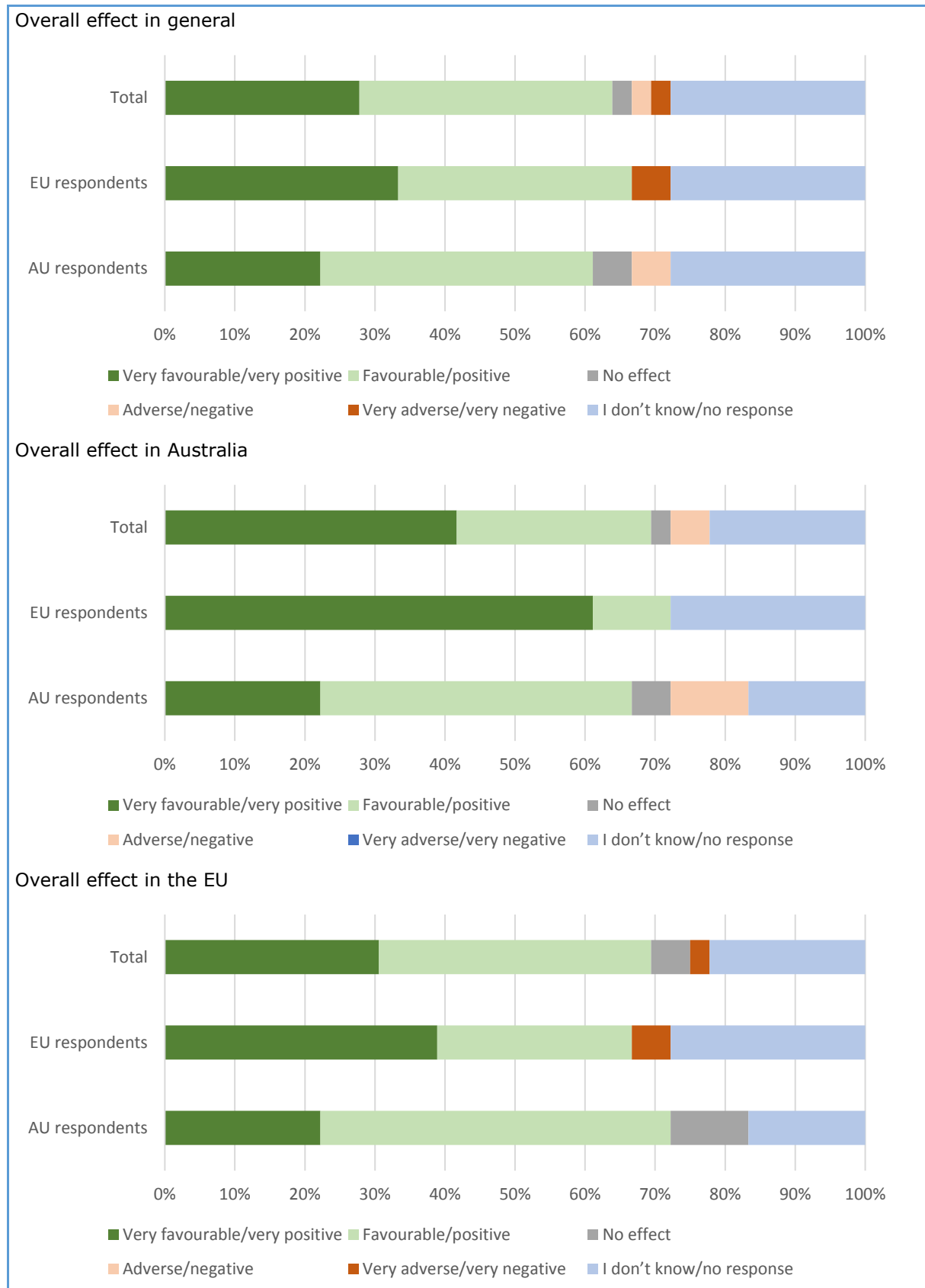
### 3.8 Overall views on the Agreement

To get an overall image of survey participants' expectations from the FTA, the surveys included a question on whether they had a positive or negative perception of the Agreement's overall effects in Australia, in the EU and in general.

The responses are summarised in Figure 22. 64% of respondents stated that the overall effect of the Agreement would be positive or very positive, while 6% anticipated a negative overall impact of the Agreement (28% did not know or provided no response). The pattern

of responses was very similar when asked about the overall effects in Australia and in the EU, and across respondents in the EU and in Australia.

**Figure 22: Anticipated overall effects of the FTA**



Survey participants were then also asked about their “biggest fears” and “greatest hopes” in relation to the Agreement. The responses regarding the biggest fears were:

- *If progress in dismantling of non tariff barriers in particular is not made, it will be a missed opportunity.*
- *Increased competition without much added benefit*
- *Limited access for Australian native foods and botanicals*
- *FTA will facilitate a lowering of quality of life through an integration of economies that privileges multinational corporations and investment practices that benefit the '1%' at the expense of the 99%*
- *Adverse effects on Australian agriculture due to subsidised inefficient and protected EU sector gains undue advantage*
- *Australia accepting the EU GI system*
- *Potential for dumping of Australian agricultural products on Irish/EU market and resulting distortion of market competitiveness (2 responses)*
- *That it doesn't deliver true and fair reciprocity*
- *That the EU will maintain the high levels of protection for its agricultural market (several responses)*
- *For EU Outermost Regions, that EU tariffs on speciality sugars are dismantled. Outermost Region special sugar producers will never be able to compete on equal terms with Australian producers due to the lack of economies of scale. Indeed, while negotiating new agreement the Commission must take into account the outcomes in other trade agreements already concluded.*
- *With beef and lamb being identified as "particularly sensitive issues" it will be important to ensure that the scale and competitiveness of the Australian red meat sector is not misrepresented by interest groups throughout the negotiations.*
- *The EU enforcing further regulatory burdens on Australia without significant wins for Australian Agriculture.*
- *The increased web of trade rules that come from bilateral trade agreements*
- *The biggest fear is that consumer interests are not sufficiently taken into account in the negotiations, and the opportunity is missed to conclude an FTA that places consumer interests at the heart of the agreement and protects consumer rights and brings tangible benefits to consumers.*
- *The difficulty for us is the lack of transparency in knowing what is on the table to be able to assess what the concerns are for public health. However, we have seen the EU proposed text on intellectual property and have serious concerns of the potential impacts for access to medicines.*
- *We are concerned about the impact that the agreement could have on access to medicines in Australia, the potential impact on the environment and our collective ability to respond to climate change, the impact that provisions could have on Australian SME's, particularly Indigenous led SME's, and the potential impact on the ability of governments to implement privacy regulations and other protections for consumers.*
- *That it will lead to an increase in intensive farm animal production and thereby also an increased negative impact on the environment and animal welfare. This FTA has the potential to increase protections for both farmed and wild animals and the natural environment, but will only succeed in this if ambitious provisions are agreed and adopted.*
- *That it could reinforce negative trends seen in other trade agreements, increasing trade in unhealthy goods including tobacco and alcohol, limiting equitable access to medicines, stymieing domestic attempts to regulate to protect public health, and strengthening the hand of transnational corporations to challenge legislation laying down public health protections via investment dispute settlement mechanisms, as was seen with the challenge on Australia's plain cigarette packaging law from Philip Morris International, which was intended to cause regulatory chill of tobacco control measures. We also fear that, if the trade agreement expands opportunities for corporations to dispute the introduction of public health measures going forward and/or influence their formulation and implementation, this essentially "locks" the*

*EU and Australia to the repercussions of these specifications for years to come, and allows industries to influence national and EU legislation, and potentially, outside of democratic processes and hidden from public scrutiny.*

- *That the EU will try to impose its own beliefs, practices etc. through the FTA onto Australian businesses/industries. It is important that production systems, operating climates, existing assurance and quality programs etc. are understood and acknowledged by the EU and their equivalence to existing EU standards is recognized.*
- *That the EU doesn't understand Australian production systems and attempts to impose unfair regulatory terms that aren't viable. That the EU does not respect the existing regulatory standards that Australia holds that are some of the strongest in the world.*
- *That Europe will be too reticent in using these negotiations as an opportunity to achieve greater equivalence between Australia and the EU on higher social and environmental standards ie on sustainability.*
- *Environmental protection/ Emissions*
- *The most concerning aspect at this stage from a consumer perspective is the EU proposal on good regulatory practices. While there is a need for more regulatory predictability, a trade agreement is not the appropriate tool to define the conditions under which governments should conduct impact assessments, public consultation and legislative reviews. These are democratic processes that first need to take into account societal needs while considering the impact on trade flows, not the other way around.*
- *That the negotiations will be a long and drawn out process and the FTA will not be ratified (2 responses)*
- *No fear.*

Conversely, the following “greatest hopes” were stated by respondents:

- *Better conditions for trade through liberalisation (several responses)*
- *Enhanced cooperation in the field of SPS*
- *For the Australian raw sugar milling export sector, the removal of tariffs and quota restrictions will make Australian sugar more competitive against other raw sugar exporters like Brazil and South Africa.*
- *FTA will give greater traction for Australian and EU civil society organisations encouraging Australian business and government to embrace higher standards regarding privacy, information access and so forth*
- *If the opportunity to ensure support for Australian medicines innovation is taken, a trade agreement between the EU and Australia will help underwrite greater investment for Australian ideas, Australian research and Australian biotech entrepreneurs. It will provide encouragement for high quality, STEM related jobs. It will provide a faster, more efficient medicines regulatory process. And it will, critically, provide better access for Australian patients to innovative medicines. All of these elements combine to boost the Australian economy, taxation revenues and the health and wellbeing of Australians.*
- *Improved and/or enhanced trade between the parties with removal of detrimental tariff barriers, improved quotas, trade liberalization.*
- *Increased market access for Irish businesses in Australia*
- *Less red tape*
- *Liberalised trade in services. Reduced corruption in Australia. Strengthened environmental protection in Australia. And stronger protections of Indigenous rights in Australia*
- *Opportunities for SMEs*
- *Our greatest hope is that it will benefit environmental protection, biodiversity and will leverage improvements in animal welfare standards (particularly in Australia, which has lower standards than in the EU).*
- *Our industry's aim is to continue to provide the EU with the choice of a range of superior imported products - via helping to fill a portion of the gap between EU domestic red meat production and projected EU consumer consumption requirements.*

*The Australian industry views the EU as a natural long-term trading partner. We are therefore highly supportive of securing a comprehensive, trade enhancing FTA with the EU - with the outcome providing substantial increases in market access for our products.*

- *Removal of remaining tariffs for footwear*
- *Removal of tariffs and EU subsidies*
- *Tangible benefits for consumers: including for the first time a provisions which would promote the need to better inform consumer online and grant them easy access to redress. But also would pave the way for more transparent and affordable telecom prices as on average 1 million EU citizens are traveling to Australia per year and vice versa.*
- *That Europe will progressively accept greater levels of social and environmental responsibility and that Australia will have not choice but to follow if it wishes to retain its valuable economic relationship with Europe.*
- *That horticultural products increase their market access to the broader EU*
- *That it could raise the bar, and demonstrate what a truly health-coherent trade agreement, focussed on public well-being looks like.*
- *That the wool industry continues to experience liberal trade between the EU and Australia and that non-tariff barriers are eliminated.*
- *That these two great trading blocks will get ever closer together in a smaller world.*
- *That we can collaborate on Animal Welfare, Investment, and MNP*
- *The ability to trade freely, to deliver returns to farm gate and to have fairer supply chains.*
- *The inclusion of agricultural products that allows for an improvement in trading opportunities for products such as raw sugar from Australia*
- *That the EU will fully open its market for agricultural products.*
- *That the EU and Australia set a real gold standard, such standard would put the interests of consumers at the centre of the Agreement while strengthening the economy.*

In the concluding comments, most survey participants reiterated some of the statements made earlier in the survey. Some expressed their satisfaction with certain aspects of the future FTA, and some others reiterated the importance of certain aspects.

## ANNEX A: TABLES AND GRAPHS

**Table 2: Anticipated economic impact – type and direction of effects**

	Respondents in AU							
	Strongly agree	Somewhat agree	There will be no effect	Somewhat disagree	Strongly disagree	I don't know	NA	Total
Goods exports from Australia to the EU will grow	4	4	2	2	0	3	1	16
Services exports from Australia to the EU will grow	4	3	2	1	0	5	1	16
Goods exports from the EU to Australia will grow	5	4	1	1	0	4	1	16
Services exports from the EU to Australia will grow	3	5	1	1	0	5	1	16
The Australian economy will grow stronger	3	4	2	2	0	4	1	16
The EU economy will grow stronger	3	5	2	1	0	4	1	16
Australian investment in the EU will increase	3	3	3	1	0	5	1	16
EU investment in Australia will increase	2	5	3	1	0	4	1	16
There will be more opportunities for Australian companies to participate in	2	4	2	1	0	6	1	16
There will be more opportunities for EU companies to participate in govern	2	6	3	0	0	4	1	16
Small and medium-sized enterprises in Australia will benefit	2	3	2	4	3	1	1	16
Small and medium-sized enterprises in the EU will benefit	2	5	2	4	1	1	1	16
Conditions for digital trade will improve (e-commerce, trade in digital servi	1	5	2	2	0	5	1	16
Consumers in Australia will benefit	3	5	3	1	1	2	1	16
Consumers in the EU will benefit	2	6	4	1	0	2	1	16
Intellectual property rights (including geographical indications) will be bett	1	5	1	2	3	3	1	16
Governance will improve	1	3	4	2	1	4	1	16
Corruption will decrease	0	0	8	2	0	5	1	16
Other	0	1	2	2	0	7	4	16
	EU respondents							
	Strongly agree	Somewhat agree	There will be no effect	Somewhat disagree	Strongly disagree	I don't know	NA	Total
Goods exports from Australia to the EU will grow	9	3	0	0	0	3	1	16
Services exports from Australia to the EU will grow	4	3	0	0	0	8	1	16
Goods exports from the EU to Australia will grow	8	3	1	0	0	3	1	16
Services exports from the EU to Australia will grow	6	1	0	0	0	8	1	16
The Australian economy will grow stronger	4	5	0	0	0	6	1	16
The EU economy will grow stronger	4	5	1	1	0	4	1	16
Australian investment in the EU will increase	3	6	0	0	0	5	2	16
EU investment in Australia will increase	4	4	0	0	0	6	2	16
There will be more opportunities for Australian companies to participate in	2	4	0	0	0	9	1	16
There will be more opportunities for EU companies to participate in govern	3	2	1	0	0	9	1	16
Small and medium-sized enterprises in Australia will benefit	4	6	0	0	0	5	1	16
Small and medium-sized enterprises in the EU will benefit	5	6	0	0	0	4	1	16
Conditions for digital trade will improve (e-commerce, trade in digital servi	4	1	1	0	0	10	0	16
Consumers in Australia will benefit	5	5	1	0	0	4	1	16
Consumers in the EU will benefit	5	5	0	0	0	6	0	16
Intellectual property rights (including geographical indications) will be bett	7	3	1	0	0	4	1	16
Governance will improve	2	2	5	0	0	6	1	16
Corruption will decrease	1	1	5	0	0	8	1	16
Other	2	0	1	0	0	7	6	16
	All respondents							
	Strongly agree	Somewhat agree	There will be no effect	Somewhat disagree	Strongly disagree	I don't know	NA	Total
Goods exports from Australia to the EU will grow	13	7	2	2	0	6	2	32
Services exports from Australia to the EU will grow	8	6	2	1	0	13	2	32
Goods exports from the EU to Australia will grow	13	7	2	1	0	7	2	32
Services exports from the EU to Australia will grow	9	6	1	1	0	13	2	32
The Australian economy will grow stronger	7	9	2	2	0	10	2	32
The EU economy will grow stronger	7	10	3	2	0	8	2	32
Australian investment in the EU will increase	6	9	3	1	0	10	3	32
EU investment in Australia will increase	6	9	3	1	0	10	3	32
There will be more opportunities for Australian companies to participate in	4	8	2	1	0	15	2	32
There will be more opportunities for EU companies to participate in govern	5	8	4	0	0	13	2	32
Small and medium-sized enterprises in Australia will benefit	6	9	2	4	3	6	2	32
Small and medium-sized enterprises in the EU will benefit	7	11	2	4	1	5	2	32
Conditions for digital trade will improve (e-commerce, trade in digital servi	5	6	3	2	0	15	1	32
Consumers in Australia will benefit	8	10	4	1	1	6	2	32
Consumers in the EU will benefit	7	11	4	1	0	8	1	32
Intellectual property rights (including geographical indications) will be bett	8	8	2	2	3	7	2	32
Governance will improve	3	5	9	2	1	10	2	32
Corruption will decrease	1	1	13	2	0	13	2	32
Other	2	1	3	2	0	14	10	32

Source: General survey responses; n = 32.

**Table 3: Anticipated economic impact – most affected sectors**

	In the EU					In Australia			
	Most affected sector	2nd most affected sector	3rd most affected sector	Score		Most affected sector	2nd most affected sector	3rd most affected sector	Score
Dairy	4	4	3	23	Agriculture	5			15
Agriculture	7			21	Meat production	3	1	2	13
Meat production	4	1	1	15	SMEs	2			6
Industrial/manufactured goods	1	2		7	Wool	2			6
e-Commerce	2			6	Dairy	1			3
Food products	1	1		5	Food products	1			3
Consumers	1			3	Petroleum, Gases LNG	1			3
Services	1			3	Research	1			3
Research	1			3	Wine	1			3
Wool manufacturing	1			3	Biotechnology sector		1		2
Biotechnology sector		1		2	Cereals		1		2
Investment		1		2	Investment		1		2
Health sector			1	1	Medicines		1		2
Textiles			1	1	Raw Sugar		1		2
					Health sector			1	1

Source: General survey responses; n = 32.

**Table 4: Anticipated social impact – type and direction of effects**

		AU respondents								
		Very positively	Somewhat positively	Not at all	Somewhat negatively	Very negatively	Don't know/no response	I don't know	NA	Total
Effect in AU	Employment level	2	4	3	2	0	5	4	1	16
	Wages	2	3	4	2	0	5	4	1	16
	Female participation in labour market	2	1	6	1	0	6	5	1	16
	Gender equality	1	2	6	1	0	6	4	2	16
	Quality of work	1	2	7	1	0	5	4	1	16
	Child labour	1	0	10	0	0	5	4	1	16
	Forced labour	1	1	9	0	0	5	4	1	16
	Trade unions, workers' rights	1	0	10	0	0	5	4	1	16
	Transition from informal to formal employment	0	4	7	0	0	5	4	1	16
	Disabled people/vulnerable groups	0	4	7	0	0	5	4	1	16
	Rights & protection of migrant workers	4	0	6	0	0	6	5	1	16
	Poverty	0	5	5	0	0	6	5	1	16
	Income inequality	2	0	7	1	0	6	5	1	16
	Wealth inequality	0	1	7	2	0	6	5	1	16
	Consumers	3	7	0	0	2	4	3	1	16
	Vocational training	2	2	6	0	0	6	4	2	16
	Social protection	1	1	8	0	0	6	4	2	16
	Access to education	1	1	8	0	0	6	4	2	16
	Access to health care	2	0	8	1	0	5	3	2	16
	Other	1	2	3	0	0	10	6	4	16
Effect in the EU	Employment level	1	5	4	0	0	6	5	1	16
	Wages	1	4	4	1	0	6	5	1	16
	Female participation in labour market	2	1	6	0	0	7	6	1	16
	Gender equality	1	2	6	0	0	7	6	1	16
	Quality of work	1	2	7	0	0	6	5	1	16
	Child labour	1	1	8	0	0	6	5	1	16
	Forced labour	0	1	9	0	0	6	5	1	16
	Trade unions, workers' rights	0	2	7	1	0	6	5	1	16
	Transition from informal to formal employment	0	3	6	1	0	6	5	1	16
	Disabled people/vulnerable groups	0	3	6	1	0	6	5	1	16
	Rights & protection of migrant workers	1	2	6	1	0	6	5	1	16
	Poverty	1	2	6	1	0	6	5	1	16
	Income inequality	0	2	7	1	0	6	5	1	16
	Wealth inequality	0	1	7	2	0	6	5	1	16
	Consumers	3	5	2	0	0	6	5	1	16
	Vocational training	2	1	7	0	0	6	5	1	16
	Social protection	1	0	9	0	0	6	5	1	16
	Access to education	1	1	8	0	0	6	5	1	16
	Access to health care	2	0	8	0	0	6	5	1	16
	Other	1	0	4	0	0	11	7	4	16

(Continues)



# SIA – Negotiation of the Free Trade Agreement between the EU and Australia

## Final Report

(Continued)

		EU respondents								Total	
		Very positively	Somewhat positively	Not at all	Somewhat negatively	Very negatively	Don't know/no response	I don't know	NA		
Effect in AU	Employment level	1	2	1	0	0	12	5	7	16	
	Wages	0	1	3	0	0	12	5	7	16	
	Female participation in labour market	0	3	1	0	0	12	5	7	16	
	Gender equality	0	1	3	0	0	12	5	7	16	
	Quality of work	0	0	4	0	0	12	5	7	16	
	Child labour	0	1	3	0	0	12	5	7	16	
	Forced labour	0	0	4	0	0	12	5	7	16	
	Trade unions, workers' rights	0	1	3	0	0	12	5	7	16	
	Transition from informal to formal employment	0	0	4	0	0	12	5	7	16	
	Disabled people/vulnerable groups	0	1	3	0	0	12	5	7	16	
	Rights & protection of migrant workers	0	1	3	0	0	12	5	7	16	
	Poverty	0	2	2	0	0	12	5	7	16	
	Income inequality	0	1	3	0	0	12	5	7	16	
	Wealth inequality	0	2	2	0	0	12	5	7	16	
	Consumers	1	2	2	0	0	11	4	7	16	
	Vocational training	0	2	2	0	0	12	5	7	16	
Effect in the EU	Social protection	0	1	3	0	0	12	5	7	16	
	Access to education	1	1	2	0	0	12	5	7	16	
	Access to health care	0	0	4	0	0	12	5	7	16	
	Other	0	0	1	0	0	15	6	9	16	
	Employment level	1	2	1	0	1	11	5	6	16	
	Wages	0	2	2	1	0	11	5	6	16	
	Female participation in labour market	0	2	1	1	0	12	6	6	16	
	Gender equality	0	1	2	1	0	12	6	6	16	
	Quality of work	0	1	3	1	0	11	5	6	16	
	Child labour	0	1	4	0	0	11	5	6	16	
	Forced labour	0	1	4	0	0	11	5	6	16	
	Trade unions, workers' rights	0	1	3	1	0	11	5	6	16	
	Transition from informal to formal employment	0	0	4	0	0	12	6	6	16	
	Disabled people/vulnerable groups	1	0	3	1	0	11	5	6	16	
	Rights & protection of migrant workers	1	2	2	0	0	11	5	6	16	
	Poverty	0	2	2	1	0	11	5	6	16	
All respondents	Income inequality	0	2	3	0	0	11	5	6	16	
	Wealth inequality	0	2	2	1	0	11	5	6	16	
	Consumers	1	3	1	0	0	11	6	5	16	
	Vocational training	0	3	2	0	0	11	5	6	16	
	Social protection	0	2	1	1	0	12	6	6	16	
	Access to education	0	3	2	0	0	11	5	6	16	
	Access to health care	0	2	2	0	0	12	6	6	16	
	Other	0	0	1	0	0	15	7	8	16	
	Effect in AU	All respondents									
		Very positively	Somewhat positively	Not at all	Somewhat negatively	Very negatively	Don't know/no response	I don't know	NA	Total	
		Employment level	3	6	4	2	0	17	9	8	32
		Wages	2	4	7	2	0	17	9	8	32
		Female participation in labour market	2	4	7	1	0	18	10	8	32
		Gender equality	1	3	9	1	0	18	9	9	32
		Quality of work	1	2	11	1	0	17	9	8	32
		Child labour	1	1	13	0	0	17	9	8	32
Forced labour		1	1	13	0	0	17	9	8	32	
Trade unions, workers' rights		1	1	13	0	0	17	9	8	32	
Transition from informal to formal employment		0	4	11	0	0	17	9	8	32	
Disabled people/vulnerable groups		0	5	10	0	0	17	9	8	32	
Rights & protection of migrant workers		4	1	9	0	0	18	10	8	32	
Poverty		0	7	7	0	0	18	10	8	32	
Income inequality		2	1	10	1	0	18	10	8	32	
Wealth inequality		0	3	9	2	0	18	10	8	32	
Consumers		4	9	2	0	2	15	7	8	32	
Vocational training		2	4	8	0	0	18	9	9	32	
Social protection		1	2	11	0	0	18	9	9	32	
Effect in the EU		Access to education	2	2	10	0	0	18	9	9	32
	Access to health care	2	0	12	1	0	17	8	9	32	
	Other	1	2	4	0	0	25	12	13	32	
	Employment level	2	7	5	0	1	17	10	7	32	
	Wages	1	6	6	2	0	17	10	7	32	
	Female participation in labour market	2	3	7	1	0	19	12	7	32	
	Gender equality	1	3	8	1	0	19	12	7	32	
	Quality of work	1	3	10	1	0	17	10	7	32	
	Child labour	1	2	12	0	0	17	10	7	32	
	Forced labour	0	2	13	0	0	17	10	7	32	
	Trade unions, workers' rights	0	3	10	2	0	17	10	7	32	
	Transition from informal to formal employment	0	3	10	1	0	18	11	7	32	
	Disabled people/vulnerable groups	1	3	9	2	0	17	10	7	32	
	Rights & protection of migrant workers	2	4	8	1	0	17	10	7	32	
	Poverty	1	4	8	2	0	17	10	7	32	
	Income inequality	0	4	10	1	0	17	10	7	32	
	Wealth inequality	0	3	9	3	0	17	10	7	32	
	Consumers	4	8	3	0	0	17	11	6	32	
	Vocational training	2	4	9	0	0	17	10	7	32	
	Social protection	1	2	10	1	0	18	11	7	32	
Access to education	1	4	10	0	0	17	10	7	32		
Access to health care	2	2	10	0	0	18	11	7	32		
Other	1	0	5	0	0	26	14	12	32		

Source: General survey responses.



**Table 5: Anticipated social impact - Most affected social groups in Australia**

	Most affected group	AU respondents		Score	Most affected group	EU respondents		Score	Total score
		2nd most affected group	3rd most affected group			2nd most affected group	3rd most affected group		
Consumers	4		1	13	2			6	19
Farmers	2			6				0	6
Indigenous peoples	1	1		5				0	5
Youth	1	1		5				0	5
Informal workers	1			3				0	3
Patients	1			3				0	3
Small business owners				0	1			3	3
Students/ Academia				0	1			3	3
Workers in STEM and related sectors		1	1	3				0	3
Disabled persons		1		2				0	2
SMEs				0		1		2	2
Sugar refiners		1		2				0	2
Women		1		2				0	2

**Most affected social groups in the EU**

	Most affected group	AU respondents		Score	Most affected group	EU respondents		Score	Total score
		2nd most affected group	3rd most affected group			2nd most affected group	3rd most affected group		
Consumers	4			12	5			15	27
Small business owners				0	1			3	3
Farmers	1			3				0	3
Patients	1			3				0	3
Informal workers	1			3				0	3
Workers in STEM and related sectors		1	1	3				0	3
SME exporters				0		1		2	2
Sugar refiners		1		2				0	2
Youth		1		2				0	2
Regional communities			1	1				0	1

Source: General survey responses.

## ANNEX B: STAKEHOLDERS INCLUDED IN THE DATABASE

### Stakeholders in the European Union

ACT Alliance Advocacy to the European Union
Active Pharmaceutical Ingredients Committee
AeroSpace and Defence Industries Association of Europe
Agriculture and Horticulture Development Board (AHDB)
Airlines for Europe
Airports Council International Europe
Amnesty International - EU Institutions Office
Antwerp World Diamond Centre
Architects' Council of Europe (ACE)
ASINCA
Asociación Española de Mayoristas, Transformadores, Importadores y Exportadores de Productos de la Pesca y la Acuicultura
Assocalzaturifici - Italian Footwear Manufacturers' Association
Association de l'Aviculture, de l'Industrie et du Commerce de Volailles dans les Pays de l'Union Européenne asbl
Association de producteurs de cinéma et de télévision (EUROKINEMA)
Association des Constructeurs Européens d'Automobiles (ACEA)
Association Européenne Du Commerce De Fruits Et Légumes De L'UE - European Fruit and Vegetables Trade Association
Association nationale interprofessionnelle du bétail et des viandes (Interbev)
Association of European Automotive and Industrial Battery - EUROBAT
Association of European Heating Industry
Association of European manufacturers of sporting ammunition
Österreichischer Gewerkschaftsbund
BDI - Federal Association of German Industries
Bocconi University
Brussels Office of the Swedish Trade Unions
Bundesarbeitskammer Österreich
Bureau de Recherches Géologiques et Minières (BRGM)
Bureau Européen de l'Agriculture Française
Bureau International des Producteurs d'Assurances & de Réassurances (BIPAR)
Business and Industry Advisory Committee (BIAC)(OECD)
BUSINESSEUROPE
Câmara de Comércio e Indústria da Madeira
Camara de Comércio e Indústria da Horta
Câmara de Comércio e Indústria de Ponta Delgada
Câmara do Comércio de Angra do Heroísmo
Carbon Capture & Storage Association (CCSA)
Comité Européen des Fabricants de Sucre (CEFS)
CEN - CENELEC
Central Europe Energy Partners (CEEP)
Centre de Documentation, de Recherche et d'Information des Peuples Autochtones
Centre for Socio-Eco-Nomic Development (CSEND)
Chambers of Commerce of Ireland (Chambers Ireland)
Chambre de commerce et d'industrie de région Paris Ile-de-France
Cia - Agricoltori italiani
Cobalt Development Institute (CDI)
Comité du commerce des céréales, aliments du bétail, oléagineux, huile d'olive, huiles et graisses et agrofournitures de l'U.E.
Comité Européen des Assurances (CEA)
Comité Européen des Entreprises Vins (CEEV)
Committee for European Construction Equipment
Committee of the European Sugar Users
Confédération des Syndicats Chrétiens
Conférence des Notariats de l'Union Européenne
Confederação Nacional das Cooperativas Agrícolas e do Crédito Agrícola de Portugal
Confederatia Sindicala Nationala MERIDIAN (CSN MERIDIAN)

Confederation Francaise Democratique du Travail (CFDT)
Confederation of Danish Industry (DI)
Confederation of European Community Cigarette Manufacturers
Confederation of European Paper Industries
Confederation of Finnish Industries (EK)
Confederation of National Associations of Tanners and Dressers of the European Community (COTANCE)
Confederation of National Hotel and Restaurant Associations (HOTREC)
Confederation of Netherlands Industry and Employers (VNO-NCW)
Confederation of the food and drink industries of the EU (FoodDrinkEurope))
Confederation of the German Textile and Fashion Industry
Confederazione Cooperative Italiane
Confederazione Nazionale Coldiretti
Conseil des barreaux de la Communauté Européenne (CCBE)
Conservation International (CI)
Consorzio Remedia
Cooperativas Agro-alimentarias de España
Cosmetics Europe - The Personal Care Association
Council of European Employers of the Metal, Engineering and Technology - Based Industries (CEEMET)
Critical Raw Materials Alliance (CRM Alliance)
Danish Agriculture & Food Council
Danish Shipping
Deutscher Industrie- und Handelskammertag e.V.
DIGITALEUROPE
Direct Selling Europe AISBL
Dutch Dairy Trade Association
Ecommerce Europe
Electrical and Electronic Portuguese Enterprises Association (ANIMEE)
Estonian Employers' Confederation (ETTK)
Estonian Investment Agency
EU Agency for Fundamental Rights (FRA)
EU Vegetable Oil and Proteinmeal Industry
EU-Australia Round Table
EUROALLIAGES
Eurochambres
EuroCommerce
EURODOM
EuroGeoSurveys - The Geological Surveys of Europe (EGS)
Eurogroup for Animals
Eurometal
EuropaBio - European Association for Bioindustries
European & International Federation of Natural Stone Industries (EUROROC)
European Accounting Association
European Aerosol Federation
European Aggregates Association (UEPG)
European Aluminium AISBL
European Apparel and Textile Confederation EURATEX
European Association of Automotive Suppliers (CLEPA)
European Association of Chemical Distributors (Fecc)
European Association of Cooperative Banks (EACB)
European Association of Craft, Small and Medium-Sized Enterprises - UEAPME
European Association of Dairy Trade (Eucolait)
European Association of Fruit and Vegetable Processors - PROFEL
European Association of Internet Services Providers (ISPA)
European Association of Metals Eurometaux
European Association of Mining Industries, Metal Ores & Industrial Minerals (Euromines)
European Association of Mutual Guarantee Societies
European Association of Sugar Traders (ASSUC)
European Association of the Machine Tool Industries (CECIMO)
European Association representing the agricultural machinery industry (CEMA)
European Aviation Clusters Partnership

European Banking Federation (EBF)
European Biodiesel Board
European Branded Clothing Alliance
European Brands Association
European Broadcasting Union (EBU)
European Builders Confederation
European Business Aviation Association (EBAA)
European Business Services Round Table
European Cement Association (CEMBUREAU)
European Centre for International Political Economy
European Ceramic Industry Association (Cerame-Unie)
European Chemical Industry Council (Cefic)
European Cocoa Association
European Committee for Electrotechnical Standardization
European Committee of Domestic Equipment Manufacturers (CECED)
European Community Shipowner's Associations
European Competitive Telecommunications Association
European Concrete Paving Association
European Confederation of Junior Enterprises
European Confederation of Woodworking Industries (CEI-Bois)
European Construction Industry Federation
European Consumer Organisation (BEUC)
European Coordination Committee of the Radiological, Electromedical and Healthcare IT Industry (COCIR)
European Coordination of Independent Producers (CEPI)
European Council for Automotive R&D (EUCAR)
European Council for Motor Trades and Repairs (CECRA)
European Crop Protection Association
European Dairy Association
European Diisocyanate and Polyol Producers Association
European Disposables & Nonwovens Association (EDANA)
European DIY Retail Association
European Ecommerce and Omni-Channel Trade Association
European Electronic Component Manufacturers Association
European Engineering Industries Association (EUnited)
European Environmental Bureau (EEB)
European Expanded Clay Association (EXCA)
European Express Association
European Family Businesses
European Farmers
European Federation for Construction Chemicals
European Federation for Cosmetic Ingredients
European Federation of Biotechnology Section of Applied Biocatalysis
European Federation of Engineering Consultancy Associations
European Federation of Food, Agriculture and Tourism Trade Unions - EFFAT
European Federation of Foundation Contractors
European Federation of Geologists (EFG)
European Federation of National Associations of Water and Waste Water Services
European Federation of Pharmaceutical Industries and Associations (EFPIA)
European Federation of Public Service Unions (EPSU)
European Federation of the Footwear industry
European Fish Processors & Traders Association
European Franchise Federation
European Furniture Industries Confederation
European Health Industry Business Communications Council (EHIBCC)
European Industrial Gases Association
European Institute for Gender Equality - EIGE
European Liaison Committee for Agriculture and agri-food trade (CELCAA)
European Lime Association (EULA)
European Man-made Fibres Association (CIRFS)
European Medical Technology Industry Associations (MedTech Europe)
European Milk Board

European Newspaper Publishers' Association (ENPA)
European Organisation for Security
European Organisation of Tomato Industries (OEIT)
European Panel Federation
European Patent Office
European Petroleum Industry
European Plaster and Plasterboard Manufacturers Association (EUROGYPSUM)
European Policy Centre
European Potato Processors' Association
European Potato Trade Association
European Power Tool Association
European Property Federation
European Public and Real Estate Association (EPRA)
European Public Health Alliance
European Regions Airline Association (ERA)
European Renewable Ethanol Association - EPURE
European Retail Round Table
European Robotics Association (EUnited Robotics)
European Round Table of Industrialists
European Satellite Operator's Association
European Services Forum
European Services Strategy Unit
European Shippers' Council
European Small Business Alliance
European Steel Association (EUROFER)
European Steel Technology Platform (ESTEP)
European Sugar Refineries Association
European Technology Platform on Sustainable Mineral Resources (ETP SMR)
European Telecommunications Network Operators' Association (ETNO)
European Telecommunications Standards Institute (ETSI)
European Textile Collectivities Association
European Trade Union Committee for Education
European Trade Union Confederation - ETUC
European Trade Union Institute (ETUI)
European Travel Agents' and Tour Operators' Associations
European Travel Commission
European Tyre & Rubber Manufacturers' Association (ETRMA)
European Union Road Federation
European Whey Processors Association
Fédération des Experts Comptables Européens (FEE)
Fédération Internationale de l'Automobile (FIA)
Fédération Internationale du Recyclage
Fair Trade Advocacy Office
Federation of European Publishers
Federation of European Rice Millers
Federation of the European Sporting Goods Industry
FederlegnoArredo - Federazione Italiana delle Industrie del Legno, del Sughero, del Mobile e dell'Arredamento
Female Europeans of Medium and Small Enterprises (FEM)
Fern
Fertilizers Europe
Finpro of Finland
Fiscalnote
Foreign Trade Association - Amfori
Fratini Vergano
Freshfel Europe - the forum for the European freshfruits and vegetables chain
Friedrich-Ebert-Stiftung
Friends of Europe
Friends of the Earth Europe (FoEE)
Gelatine Manufacturers of Europe (GME)
German Federal Association of Senior Citizens' Organisations - BAGSO
German Marshall Fund of the United States

German Trade Union Confederation (DGB)
Germany Trade & Invest
GINETEX
GIZ - Brüssel
Glass Alliance Europe
Global Industrial and Social Progress Research Institute(GISPRI)
Global Witness
Greenpeace
Health Action International (Europe)
Health First Europe
Human Rights Watch
Humane Society International/Europe
ICMP - the global voice of music publishing
IFPI Representing recording industry worldwide
IHK Nord e.V. - Arbeitsgemeinschaft norddeutscher Industrie- und Handelskammern
Independent Retail Europe
Industrial Ethanol Association
Industrial Minerals Association - Europe (IMA-Europe)
industriAll European Trade Union (industriAll)
INSTITOUTO GEOLOGIKON KAI METALLEFTIKON EREVNON (IGME)
Instituto Cuestiones Agrarias y Medioambientales
Intelligent Transport Systems - Europe (ERTICO)
International Association of Users of Artificial and Synthetic Filament Yarns and of Natural Silk
International Confederation of European Beet Growers (CIBE)
International Confederation of Inspection and Certification Organizations
International Co-operative Alliance
International Federation for Human Rights (FIDH)
International Federation of Inspection Agencies
International Federation of Reproduction Rights
International Land Coalition
International Network for Sustainable Energy - INFORSE-Europe
International Society for Mangrove Ecosystems (ISME)
International Trade Union Confederation (ITUC)
International Trademark Association
Irish Co-operative Organisation Society Ltd
Irish Farmers' Association
Italian National Agency for New Technologies, Energy and Sustainable Economic Development (ENEA)
Italian Trade Union Confederation
Koepel van de Vlaamse Noord - Zuidbeweging
Landwirtschaftskammer Österreich
Lighting Europe
Lithuanian Education Trade Union
Médecins Sans Frontières International
Maa-ja metstaloustuottajain Keskusliitto - Central Union of Agricultural Producers and Forest Owners
Medicines for Europe
Ministry of Economics of the Republic of Latvia in cooperation with the Ministry of Agriculture
Mouvement des Entreprises de France (Medef)
Nanofutures
NanoMEGAS
Nemzeti Agrárgazdasági Kamara
Norwegian Seafood Export Council
Orgalim
Organisation pour un réseau international d'indications géographiques
Oxfam International
Plastics Recylers Europe
Primary Food Processors
SMEUnited
Société des auteurs et compositeurs dramatiques
Solar Power Europe
Spanish Association of Soft Drinks Manufacturers

Spanish General Workers' Union - UGT
spiritsEUROPE
STARCH EUROPE
Swedish Enterprise
Trade Council of the Ministry of Foreign Affairs of Denmark
Trade Union Advisory Committee (of the OECD) (TUAC)
Transport and Environment (European Federation for Transport and Environment)
UNIFE
Union des Confédérations de l'Industrie et des Employeurs d'Europe - UNICE
Union Européenne du Commerce du Bétail et des Métiers de la Viande
Union of the Czech Production Cooperatives
Unite the Union
US Dairy Export Council
Verband Deutscher Maschinen-und Anlagenbau e.V.
VZBV: Federation of German Consumer Organisations - Verbraucherzentrale Bundesverband
Wind Europe
Wirtschaftskammer Österreich
Zentralverband des Deutschen Handwerks e.V.
Zentralverband Elektrotechnik-und Elektronikindustrie e.V.

## Stakeholders in Australia

Aboriginal Legal Rights Movement  
 Accord Australasia  
 ACT Human Rights Commission  
 Almond Board of Australia  
 Apple and Pear Australia Limited  
 Australian Aftermarket Automotive Association  
 Australian Aluminum Council  
 Australian Capital Territory, Department of Chief Minister  
 Australian Centre for Leadership for Women  
 Australian Chamber of Commerce and Industry  
 Australian Council for International Development Gender Equity Working Group  
 Australian Council of Trade Unions (ACTU)  
 Australian Dairy Industry Council  
 Australian Export Grains Innovation Centre  
 Australian Federation of AIDS Organisation  
 Australian Food and Groceries Council  
 Australian Forest Products Association  
 Australian Grape and Wine  
 Australian Hide Skin and Leather Exporters Association Ltd  
 Australian Honey Bee Industry Council  
 Australian Human Rights Commission  
 Australian Human Rights Institute, UNSW  
 Australian Industry Group (AiG)  
 Australian Institute of Aboriginal and Torres Strait Islander Studies (AIATSIS)  
 Australian Lawyers for Human Rights  
 Australian Lot Feeders Association  
 Australian Macadamia Society (AMS)  
 Australian Manufacturing Workers Union  
 Australian Native Food and Botanicals (ANFAB)  
 Australian Olive Association  
 Australian Pituitary Foundation  
 Australian Pork Limited  
 Australian Privacy Foundation  
 Australian Reproductive Health Alliance  
 Australian Society of Cosmetics Chemists  
 Australian Sugar Milling Council  
 Australian Women Against Violence Alliance  
 Australian Women's Health Network  
 Australian Wool Growers Association  
 Australian Wool Innovation

Business Council of Australia (BCA)  
Cancer Council Australia  
Canegrowers Australia  
Cattle Council of Australia  
Chemistry Australia  
Children with Disability Australia  
Climate Change Authority  
Construction and Mining Equipment Industry Group  
Cotton Australia  
Crawford School / Centre for Climate Economics and Policy  
Dairy Australia  
Department of Agriculture and Water Resources  
Department of Health  
Department of Industry, Innovation and Science  
Department of the Environment and Energy  
Department of the Prime Minister and Cabinet  
DFAT  
European Australian Business Council (EABC)  
Export Council of Australia  
FamilyVoice Australia  
Federal Chamber of Automotive Industries  
Federation of Advanced Products Manufacturers (FAMP)  
Fight Food Waste CRC  
Food and Beverage Importers' Association  
Goat Industry Council of Australia  
Great Barrier Reef Foundation  
Humane Society International/Australia  
ITS Global  
Kangaroo Industry Association of Australia (KIAA)  
Lung Foundation Australia  
Meat & Livestock Australia  
Medicines Australia  
Minerals Council of Australia (MCA)  
National Aboriginal and Torres Strait Islander Legal Service  
National Asthma Council Australia  
National Children's and Youth Law Centre  
National Farmers' Federation  
New South Wales Council for Civil Liberties  
New South West Wales, Department of Premier and Cabinet  
Northern Australia Development and Trade  
Oxfam Australia  
People with Disability Australia  
Public Health Association of Australia  
Queensland Department of Premier and Cabinet  
Reconciliation Australia  
Sheep Producers Australia  
South Australia Department of Trade  
Sugar Research Australia  
Tasmania, Department of Premier and Cabinet  
The Nature Conservancy  
Truck Industry Council  
Victoria, Department of Premier and Cabinet  
Western Australia, Department of Premier and Cabinet  
Women with Disabilities Australia (WWDA)  
Wool Producers Australia  
World Wildlife Fund (WWF)