



**Trade Sustainability Impact Assessment (SIA) in support
of Free Trade Agreement (FTA) and Investment
Protection Agreement (IPA) negotiations between
the European Union and the Republic of India**

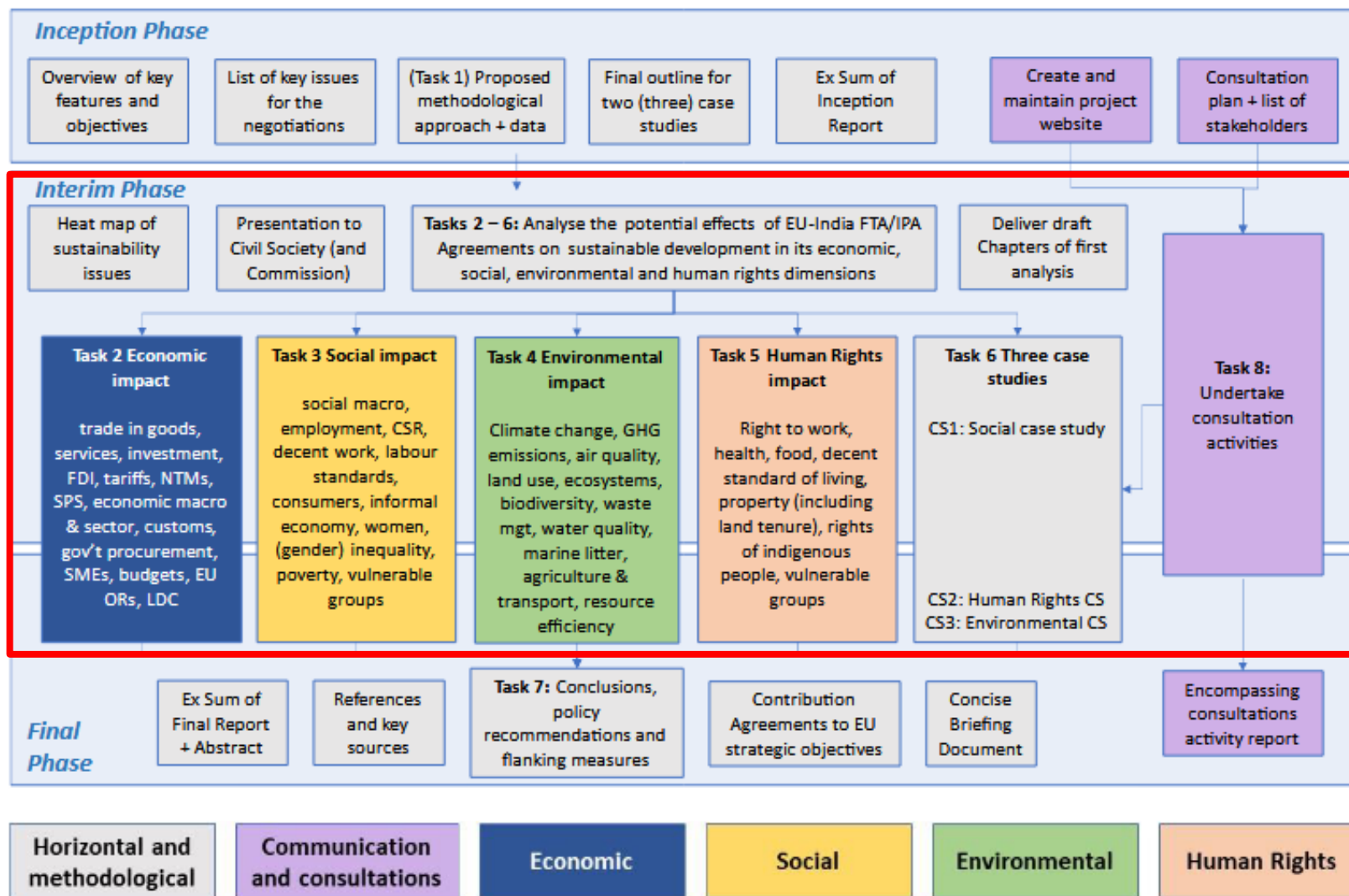
(TRADE/2022/OP/0008)

Preliminary findings from the analysis

**Civil Society Dialogue meeting
16 June 2023**

Consortium led by  Trade Impact B.V.

Overview of the project scope



Economic analysis: overall effects

- The FTA is likely to have a **marginally positive impact on EU GDP and welfare**: both EU GDP and welfare are expected to rise by 0.1% and 0.2% in the conservative and ambitious scenarios, respectively.
- In contrast, the corresponding **GDP (welfare) effects for India are much larger in percentage terms** at 0.6% (0.5%) and 1.0% (0.8%), respectively.
- **The economic gains for India are largely driven by trade** – India's total exports and imports are expected to rise by 5.7% and 6.5% in the ambitious scenario – though the country is also expected to witness a 14.5% reduction in tariff revenue in the ambitious scenario.
- The corresponding **decline in tariff revenue for the EU is expected to be much lower at 6.3%** with EU's total merchandise exports expected to increase by 0.7% (€58.9 billion).
- **Real wages for both skilled and unskilled labour are expected to increase** as a result of the FTA, which implies that disposable incomes in the EU and India would rise.

Economic analysis: effects on bilateral trade and output

- ▶ **EU merchandise exports to India are estimated to grow by 107.6% (€112.5 billion) in the ambitious scenario while India's merchandise exports to the EU are expected to rise by 86.6% (€110.7 billion).**
- ▶ **Most EU sectors report more than a doubling in value of their bilateral exports to India**, including the EU's largest merchandise sectors - chemicals, electronics and machinery - as well as the agricultural, textiles, pharma, minerals, metals and transport equipment sectors.
- ▶ **Several sectors also report large percentage gains in bilateral exports on the Indian side**, including India's largest sectors – wearing apparel and chemicals - as well as dairy, grains, sugar, meat, textiles, motor vehicles and transport equipment (all report gains in bilateral exports to the EU in excess of 100%).
- ▶ The FTA is expected to **increase EU's services exports to India by 4.7% (€1.6 billion) and India's services exports to the EU by 0.1% (€124 million).**
- ▶ **All the constituent services sectors for the EU report a rise in bilateral exports** while transport and other services report a decline in bilateral exports to the EU on the Indian side.
- ▶ Regarding **output**, in the ambitious scenario, the EU reports the largest expected gains in absolute terms in minerals, machinery, electronics, and paper; and the biggest expected losses in textiles, wearing apparel and ferrous metals. In percentage terms, the EU rice sector is expected to be the worst hit. For India, wearing apparel and textiles are the largest beneficiaries in absolute and relative terms.

Economic analysis: effects on EU ORs, LDCs & Türkiye

- **EU ORs:** India's sugar exports to the EU could increase by 177% elevating the already existing competition that Guadeloupe and La Réunion sugar producers face in exporting to the EU.
- Canary Islands, Azores and Madeira mostly export agricultural products to the EU – vegetables, animals, food and beverages, fish, and dairy products – and producers in all these sectors are likely to face competition from a rise in Indian exports to the EU as a result of the FTA.
- **LDCs:** South Asian and South-east Asian LDCs report a 0.1% decline in their GDPs in the ambitious scenario, with the remaining LDCs being largely unaffected.
- In terms of welfare, trade, and tariff revenue effects, **South Asian LDCs are relatively more adversely affected than South-east Asian LDCs** – their welfare is expected to fall by -0.2%, their total exports by -1.1% and their tariff revenue and total imports by -1.2% (the export decline for South Asian and South-east Asian LDCs emanates largely from wearing apparel).
- **Türkiye:** Limited negative impacts for Türkiye, mainly due to the fall in its trade and production in textiles and garment, both competing with imports from India (Türkiye's GDP is projected to fall by 0.0% or €748 million in the ambitious scenario and by 0.0% or €505 million in the conservative scenario).

EU strategic objectives

➤ SO I: Impact of FTA/IPA on the EU's place in India's trade and investments

Figure: EU share in Indian exports (% , 2010, 2022, 2032)

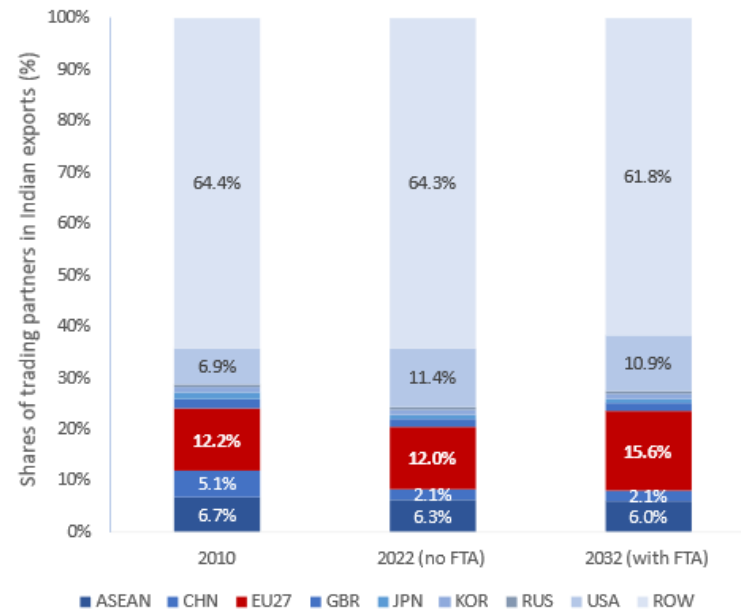
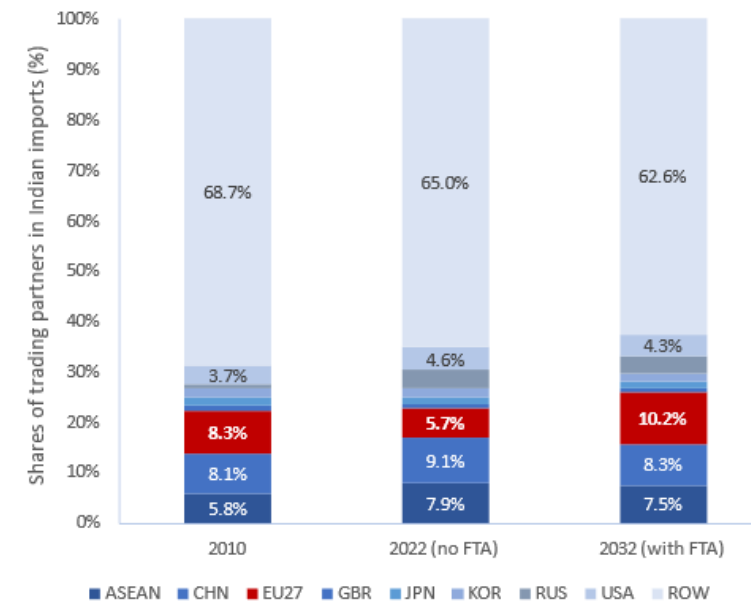


Figure: EU share in Indian imports (% , 2010, 2022, 2032)

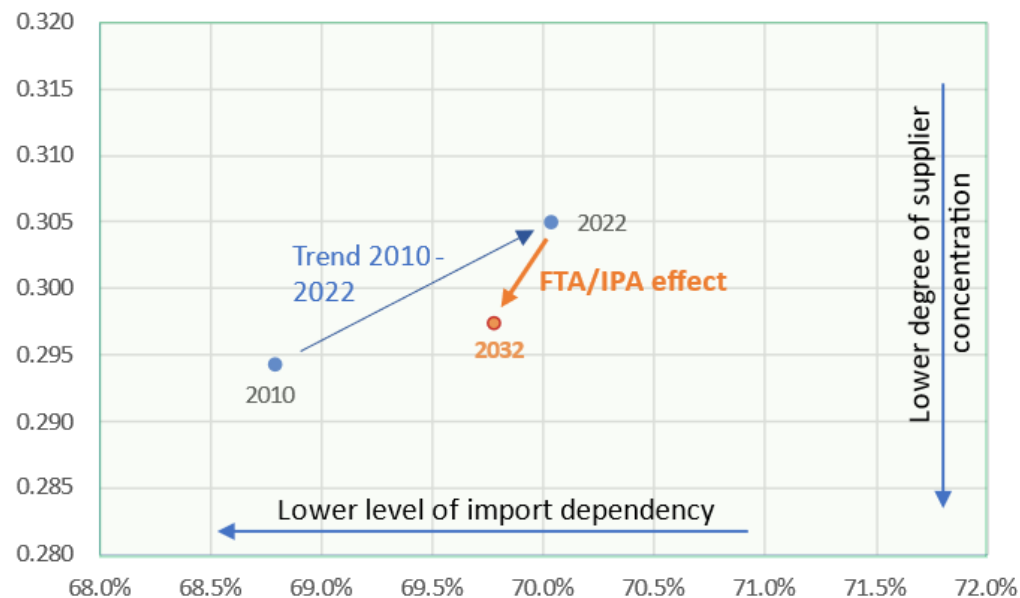


➤ **Conclusion:** the EU-India FTA/IPA are likely to support EU Strategic Objective No. I of strengthening the EU's place in India's total exports/imports, mostly at the expense of the US and China. The more ambitious the FTA, the more this is the case.

EU strategic objectives

➔ SO 2: Impact of FTA/IPA on EU supply chain security through diversification

Figure: EU import dependencies in terms of imports and supplier concentration (2010, 2022, 2032, zoomed in)



Source: Own adaptation of UN Comtrade trade data and CGE modelling results by DG Trade

➔ **Conclusion:** The EU-India FTA/IPA are likely to support EU Strategic Objective No. 2 of increasing overall supply chain security through diversification. Both import dependencies and market concentration of suppliers would go down, albeit only to a limited extent.

Investment analysis

The first research question: What are the investment conditions that apply in the EU and India and to what extent are these barriers to investments?

Step 1: Key policies to attract FDI

- Since the 2010s, efforts of reforming, rebalancing, and updating the international investment law system are taking place at the global, regional and national levels.
- This is reflected in the EU's CETA model and India's model IIA text (2015).

Step 2: Current investment climates

- Both EU and India strive to liberalise and promote FDI flows, which have been increasing bilaterally.
- At the same time, the EU has recently adopted new potentially restrictive FDI measures (FDI Screening Regulation, CBAM, Foreign Subsidies Regulation), while India maintains an FDI screening and authorisation system for numerous sectors and applies several caps on FDI.

Step 3: Current investment conditions

- Due to the existing and new (potential) FDI restrictive measures in both the EU and India, the investment conditions are suboptimal in both Parties.
- The lack of investment protection/access to arbitration due to India's termination of the IIAs with EU Member States is seen as an obstacle to FDI. Similarly, restrictions in public procurement, automotive sector and lack of effective protection of Intellectual Property Rights in India have been highlighted.

Step 4: Views on promoting and protecting investment, and International Investment Agreements

- A robust, modern IPA with access to international arbitration / Investment Court System is considered essential for promoting and protecting FDI.
- The inclusion of Fair and Equitable Treatment, Most Favoured Nation, National Treatment, and (indirect) expropriation provisions are important, which should be balanced with the right to regulate, CSR, climate, labour and human rights obligations.

Social analysis

Sector	European Union				India			
	Conservative scenario		Ambitious scenario		Conservative scenario		Ambitious scenario	
	Unsk workers	Skilled workers	Unsk workers	Skilled workers	Unsk workers	Skilled workers	Unsk workers	Skilled workers
Rice	-2.9	-2.6	-7.9	-7.1	-0.5	0.1	-0.7	0.3
Grains	-0.2	-0.1	-0.3	-0.2	-0.5	0.1	-0.6	0.5
Veg & fruits	-0.1	-0.1	-0.3	-0.2	-0.5	0.1	-0.8	0.3
Veg oils	-0.7	-0.6	-1.6	-1.4	-0.3	0.2	-0.2	0.8
Sugar	0.0	0.1	-0.2	-0.1	-0.6	0.0	-0.7	0.3
Rest Agrifood	0.1	0.1	0.2	0.1	-0.3	0.3	-0.5	0.6
Meat	-0.1	0.0	-0.2	-0.1	-0.4	0.2	-0.6	0.5
Dairy	-0.1	-0.1	-0.3	-0.2	-0.3	0.3	-0.3	0.7
Forestry	0.0	0.1	-0.1	0.0	-0.7	-0.1	-1.2	-0.1
Fish	-0.1	0.0	-0.2	-0.1	-0.4	0.2	-0.6	0.5
Fossil fuels	-0.1	-0.1	-0.1	-0.1	-0.3	-0.4	-0.5	-0.7
Minerals	2.1	2.1	2.2	2.2	-1.0	-0.4	-1.6	-0.5
Food products	0.0	0.0	-0.1	0.0	-0.5	0.0	-0.6	0.5
Bev & Tob	0.0	0.1	0.0	0.1	-0.3	0.2	-0.4	0.7
Textiles	-1.7	-1.6	-2.5	-2.3	2.1	2.7	2.7	3.8
Wearing & Apparel	-2.1	-2.0	-3.1	-2.8	11.0	11.5	15.1	16.2
Leather	-0.6	-0.6	-1.2	-1.0	3.9	4.5	6.5	7.6
Wood	0.0	0.0	-0.1	0.0	-1.2	-0.6	-1.9	-0.9
Paper	0.3	0.3	0.4	0.5	-3.3	-2.7	-5.3	-4.3
Chemicals	0.2	0.2	0.3	0.3	0.3	0.9	0.3	1.4
Pharmaceuticals	-0.2	-0.1	-0.4	-0.3	-0.4	0.2	0.0	1.0
Rubber & plastics	0.1	0.1	0.0	0.1	-0.7	-0.1	-1.1	0.0
Mineral products	-0.1	0.0	-0.1	0.0	-0.5	0.1	-0.9	0.2
Ferrous metals	-0.2	-0.2	-0.6	-0.5	-0.6	-0.1	-0.9	0.1
Non-Ferrous Metals	0.1	0.2	1.2	1.2	1.5	2.0	0.4	1.4
Metal products	0.0	0.0	-0.1	0.0	-0.4	0.1	-0.7	0.3
Electronics/elect eq	0.1	0.1	0.2	0.2	-1.2	-0.6	-1.8	-0.8
Machinery	0.2	0.3	0.3	0.4	-2.0	-1.4	-3.1	-2.1
Motor vehicles	0.0	0.0	-0.1	0.0	0.1	0.6	0.2	1.2
Transport equip.	-0.1	0.0	-0.2	-0.1	0.3	0.8	0.8	1.8
Other manufactures	-0.2	-0.1	-0.3	-0.3	1.0	1.6	1.4	2.4
Other services	0.0	0.0	0.0	0.0	0.2	0.1	0.3	0.2
Trade	-0.1	0.0	-0.1	0.0	-0.4	0.2	-0.6	0.4
Transport services	-0.1	0.0	-0.1	0.0	-0.2	0.3	-0.3	0.7
Other bus services	-0.1	-0.1	-0.2	-0.1	-1.2	-0.7	-0.3	-1.4

- EU exports to India and production growth may support **job creation in the EU** minerals sector, non-ferrous metals, chemicals, paper and publishing, machinery, electronics & electrical equipment sectors.
- **Increased imports from India may put at risk some EU jobs** in the rice, vegetable oils, sugar, dairy, meat, grains, fruits and vegetables, textiles, clothing, leather, pharmaceuticals, and ferrous metals sectors.
- The EU-India FTA is likely to trigger a **move of non-skilled agricultural workers in India** to skilled jobs or out of agriculture to other sectors.
- **Increased exports to the EU may support job creation** in the textile, garment, leather, chemicals, pharmaceuticals, non-ferrous metals, automotive and other transport equipment sectors in India.
- Indian machinery, electronics & electrical equipment sectors and a few more may fall under pressure.

Social analysis

Effects for informality

- Jobs to be created in the EU thanks to the EU-India FTA are likely to be formal.
- In India, increased export opportunities to the EU may support job creation in large formal businesses, their suppliers (small informal units) and for home-based workers, i.e., a mix of formal and informal jobs.
- Formal jobs represent up to 5.8% of the total in the automotive sector, 6.2% in the textiles and garment, 9.7% in the leather sector and 46.6% in chemicals.
- The recent trend of replacing permanent workers in large businesses with contractual workers means that jobs created thanks to the FTA in formal enterprises may also be informal or on precarious terms.
- Prevailing cost-cutting strategies and the avoidance of the need to comply with labour regulations preserve high informality levels and precarious work in India.

Effects for working conditions

- Pressure on EU textile, garment and leather sectors may have a negative impact on working conditions (low wages, delayed payments, cut benefits, overtime, minimal investment in training and health and safety).
- Prevailing domestic and international brands' practices drive labour costs to the bottom in India. The FTA is not likely to change it on its own and would need to be accompanied by legislative measures (e.g., ban of unfair purchasing practices or enhanced due diligence).
- Likelihood of job creation in large, export-oriented factories (e.g., in the garment and leather sectors) with some permanent jobs, better facilities and work during the whole year.
- Changes in the production methods in the automotive sector (e.g., production of electric vehicles) may help improve working conditions to attract skilled workers.

Social analysis

Effects for women

- No effects (0.0%) predicted for EU women working in services (68.5%). Some sectors employing largely women (textile, garment) may fall under pressure.
- Men represent the majority of workers in EU sectors estimated to grow (e.g., machinery and chemicals).
- Women-led EU firms export goods in sectors where exports to India are likely to increase (e.g., clothing, fresh and processed food, agrifood products, metal products and electronic components).
- In India, women may benefit from job creation in the textile, garment, leather and automotive sectors.
- Self-employed women and women-led businesses in the textile, garment, and leather sectors in India may benefit from increased production and trade thanks to the FTA.

Effects for consumers

- The economic model estimates real wage increase for EU unskilled workers by 0.2% and for skilled ones by 0.1% in the ambitious scenario, while in India, real wages would grow by 1.3% and 0.6%, respectively.
- Increased trade flows in many sectors mean a better availability of goods for consumers (e.g., cosmetics, garments, motor vehicles and others).
- EU portals for unsafe imported products list goods from India, incl. cosmetics, garments, rice, peanuts and spices. Imports rising thanks to the FTA may increase risks. Required India's awareness and the application of EU requirements, and EU's and India's controls.
- Proposed extension of patent protection period (IPR chapter) may delay production of generic medicines.
- Provisions proposed in Digital Trade chapter provide consumer protection in online transactions.

Environmental analysis

- The EU-India FTA is expected to lead to an **increase in CO2 emissions** in both the EU (+0.1%) and India (+0.4% in ambitious scenario, +0,2% in conservative scenario) as per the results of the economic modelling.
- The **meat sector** in particular is expected to benefit from the FTA and is strongly related to the emissions of certain GHG and air pollutants in both partners, especially NH3, N2O and CH4 (between 25% and 33% for all). Emissions of these gases from the meat sector are expected to increase by 0.5% to 0.8% in India.
- Sectors of concerns for India also include **garment (+15.8%), leather (+7.3%) and textiles (+3.6%)**. The share of emissions from these sectors is insignificant hence little overall effect is expected in terms of CO2 emissions. Yet the growth in these sectors is expected to pose **serious challenges in terms of water and waste management issues**. Climate change and rising demand would lead to at least 40% of the Indian population living with water scarcity by 2050 compared to about 33% now.
- Preliminary findings point towards a **decrease of land used for agriculture** due to the EU-India FTA which can be considered positive for biodiversity potential in both Parties. This should be leveraged as several **biodiversity indexes are decreasing steadily in India** mostly due to habitat fragmentation, degradation and loss. Many EU Member States also **score poorly on Biodiversity Habitat Index**.
- Forestry activities are the cause of most of the India's loss of tree covers, rather than drivers of permanent deforestation. Yet, such activities should be limited in **humid primary forests** which are key sources of biodiversity.
- India ranks 80th worldwide on the **Species Habitat Index** and is on a concerning trend over the last decade. The EU presents a very contrasted situation with Ireland ranking 15th worldwide while Finland ranks 139th and Luxembourg 152nd. All trends are also negative in the EU over the past decade .

Human rights analysis – Step I: Baselines

➤ International human rights obligations


➤ UN Conventions

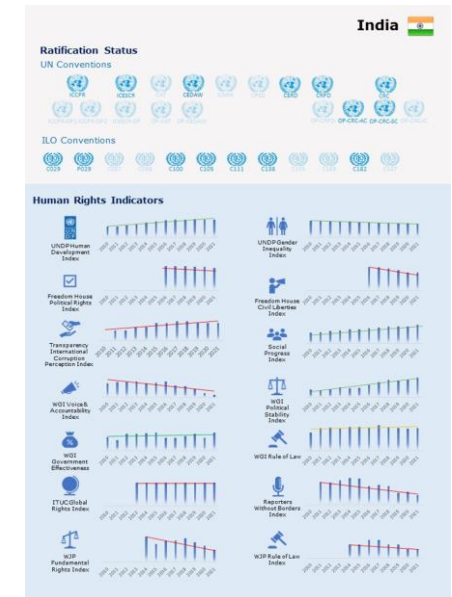
➤ ILO fundamental Conventions :  C087, C098, C155, C187, P029

 C155, C187, P029

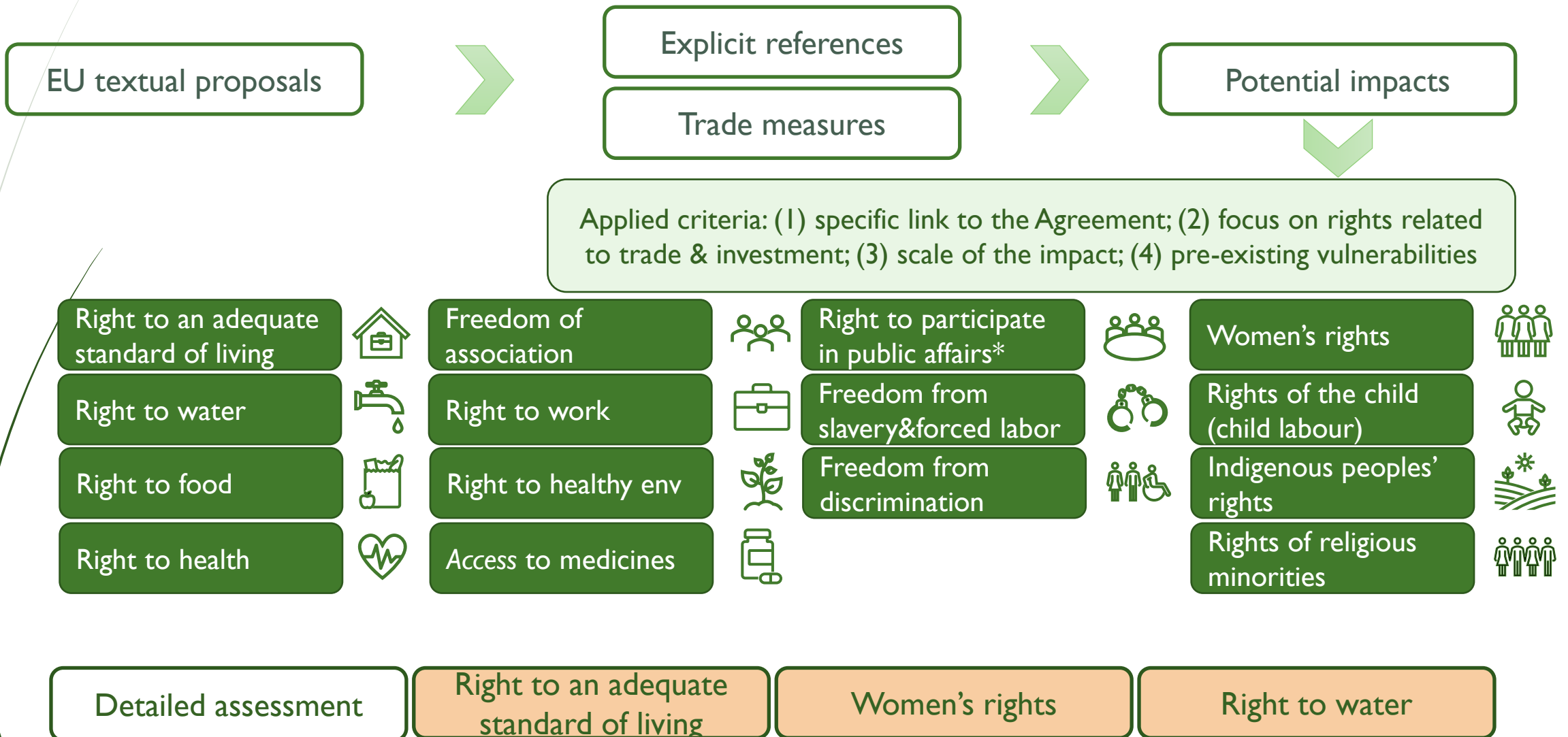
➤ Human Rights profiles: EU & India

➤ Key pre-existing vulnerabilities  a.o. labour rights violations, discrimination, restricted civil space, reported forced/bonded labour and child labour, high poverty levels, land rights, etc.

 a.o. inequality and poverty exacerbated by COVID-19 pandemic and energy crisis, discrimination



Human rights analysis – Step 2: Screening and scoping



Human rights analysis – Step 2: Screening and scoping



- **Essential elements clause** (modernised) – important for human rights protection



- **TSD Chapter provisions** allow for a potential to improve legislation, implementation, ratification record - ratification before signature of the Agreement/concrete deadlines for ratification



- **Potential impact in sectors** affected by the FTA / IPA

- Impact on the **right to an adequate standard of living** <<< Employment changes/ increase in GDP/ increase in wages/ loss in tariff revenues/ technology transfer
- Impact on the **right to water** <<< Increase production in affected sectors (textile, leather, garment) that cause high water pollution/ technology transfer/ opening market to public procurement
- Impact on **women's rights** <<< Increased production in sectors with high share of female employment



- Not likely impact on **the right to participate in public affairs**, but it may pose a challenge to implement provisions on monitoring and effective implementation in the current climate with restricted civil space / lack of transparency from the Indian government



Consultations – activities to-date

Consultation activities: ISG & CSD meetings, EESC meeting, meetings with negotiators

6 newsletters sent out













23 interviews held / 19 planned

12 written contributions received

Online surveys are open until 26 June



Statistics: (12 Jan – 12 Jun)

- Website (regularly updated)**
 1,957 views
 35
 40
- Twitter**
27 followers
8 posts
 20,496
 23
 20
 2
- LinkedIn**
7 connections
7 posts
 2,640
 23
 2
 2
- E-mail**
≈750 (addressees)
 157

Case studies

The following **topics for three case studies** have been agreed:

- **No. 1:** Impact of the EU-India FTA / IPA on employment and respect for labour standards in the textile, apparel, and leather sectors.
- **No. 2:** Impact of a potential FTA on the transition of India to a low-carbon, climate-neutral and resource efficient economy, focusing on the electric mobility / vehicles sector, and the contribution that trade in relevant services sectors can bring to this transition.
- **No. 3:** Impact of a future EU-India FTA on employment and respect for labour and environmental standards in agriculture, notably in the rice and sugar sectors.

The work has started, and results will be provided in the draft Final Report.

Roadmap towards the end of the project (Final phase)

Phase / task / deliverable	Jan '23	Feb '23	Mar '23	Apr '23	May '23	Jun '23	Jul '23	Aug '23	Sep '23	Oct '23
Final phase										
Finalise 16-week consultations on general online questionnaire						26				
Finalise 16-week consultations on online business/SME questionnaire						26				
Other targeted consultations (Final Phase)										
Step 3: Finalise analysis of potential economic effects (FTA)									11	
Step 3: Finalise impact analysis for Turkey, LDCs, EU Outermost Regions, SMEs									11	
Step 3: Finalise analysis of potential investment effects (IPA)									11	
Step 3: Finalise analysis of potential social effects									11	
Step 3 : Finalise analysis of potential environmental effects									11	
Step 3: Finalise analysis of potential human rights effects									11	
Case studies									11	
Finalise analysis of impacts on attainment of EU strategic objectives									11	
Step 4: Conclusions and recommendations									11	
Final reporting										
Preparing draft Final Report (incl. Annexes)									11	
Consultation Report									11	
Executive Summary									11	
Briefing document									11	
Draft Final Report									11	
Review meeting: Commission ISG										27
Civil society dialogue in Brussels										27
Finalisation of the Final Report										13
Translation of the executive summary (EN, FR, DE)										13
Final Report										13

TSIA EU-India trade and investment agreements



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Annex I: **Economic modelling results**

Table I: Macroeconomic effects – ambitious scenario

Region	Value GDP (ambitious)		Welfare (ambitious)		Tariff revenue (ambitious)		Value total Exports (ambitious)		Value total Imports (ambitious)		Change in Trade Balance (ambitious)		Unskilled wages (real) (ambitious)	Skilled Wages (real) (ambitious)	Return to capital (real) (ambitious)	Return to land (real) (ambitious)	Return to NatRes (real) (ambitious)	CO2 emissions (ambitious)	
	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (%)	Change (%)	Change (%)	Change (%)	Change (%)	Change (%)
EU27	0.2%	47,931	0.2%	41,013	-6.3%	-3,626	0.5%	52,740	0.6%	63,477	-2.2%	-10,737	0.2%	0.1%	0.0%	0.0%	3.2%	0.1%	NA
India	1.0%	69,580	0.8%	33,824	-14.5%	-10,448	5.7%	92,120	6.5%	82,653	2.0%	9,467	1.3%	0.6%	-0.1%	0.2%	-0.9%	0.4%	NA
LDC_SouthAsia	-0.1%	-1,118	-0.2%	-1,017	-1.2%	-193	-1.1%	-1,923	-1.2%	-1,933	1.3%	10	-0.2%	-0.2%	-0.1%	0.2%	0.1%	-0.1%	NA
Rest of South Asia	0.0%	-58	0.0%	-185	-0.2%	-25	-0.4%	-403	-0.3%	-434	0.1%	31	0.0%	0.0%	-0.1%	0.0%	0.2%	0.0%	NA
US	0.0%	-429	0.0%	-830	0.1%	72	-0.1%	-3,406	-0.1%	-2,964	0.0%	-442	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	NA
UK	0.0%	-394	0.0%	-703	-0.1%	-12	-0.2%	-2,535	-0.2%	-2,491	0.0%	-44	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	NA
China	0.0%	-7,009	0.0%	-4,997	-0.3%	-372	-0.1%	-9,188	-0.2%	-10,902	0.2%	1,714	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	NA
Japan	0.0%	-387	0.0%	-610	-0.1%	-14	-0.1%	-1,107	-0.1%	-971	-0.1%	-136	0.0%	0.0%	0.0%	0.0%	-0.1%	-0.1%	NA
South Korea	0.0%	-740	0.0%	-746	0.0%	-23	-0.1%	-1,735	-0.1%	-1,748	1.3%	13	0.0%	0.0%	0.0%	0.0%	-0.2%	-0.1%	NA
Russia & Belarus	0.0%	-122	0.0%	-84	0.0%	3	0.0%	-272	0.0%	-196	-0.1%	-76	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	NA
ASEAN	0.0%	-2,540	-0.1%	-2,151	-0.3%	-143	-0.1%	-4,931	-0.2%	-4,773	0.5%	-158	0.0%	0.0%	0.0%	0.0%	0.0%	-0.1%	NA
Türkiye	0.0%	-748	-0.1%	-838	-0.3%	-21	-0.2%	-1,112	-0.2%	-1,222	0.5%	110	-0.1%	-0.1%	-0.1%	0.1%	0.3%	0.0%	NA
LDC_SouthEast Asia	-0.1%	-170	-0.1%	-111	-0.3%	-10	-0.3%	-347	-0.3%	-312	0.0%	-35	-0.1%	-0.2%	-0.1%	0.1%	0.1%	0.0%	NA
Rest of LDC	0.0%	-248	0.0%	-383	-0.1%	-31	-0.1%	-523	-0.1%	-647	0.2%	124	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	NA
Rest of OECD	0.0%	-440	0.0%	-810	0.0%	-12	0.0%	-1,094	0.0%	-1,229	0.1%	135	0.0%	0.0%	0.0%	0.0%	-0.1%	0.0%	NA
ROW	0.0%	-3,729	0.0%	-3,550	-0.1%	-213	-0.1%	-8,140	-0.1%	-8,507	2.6%	367	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	NA
		99,379		57,822		-15,068		108,144		107,801		343							

Table 2: Macroeconomic effects – conservative scenario

Region	Value GDP (conservative)		Welfare (conservative)		Tariff revenue (conservative)		Value total Exports (conservative)		Value total Imports (conservative)		Change in Trade Balance (conservative)		Unskilled wages (real)	Skilled Wages (real)	Return to capital (real)	Return to land (real)	Return to NatRes (real)	CO2 emissions (conservative)	
	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	(conservative)	(conservative)	(conservative)	(conservative)	(conservative)	Change (%)	Change (MtCO2)
EU27	0.1%	25,528	0.1%	23,757	-5.7%	-3,287	0.3%	28,534	0.4%	36,333	-1.5%	-7,799	0.1%	0.1%	0.0%	0.0%	3.0%	0.1%	NA
India	0.6%	39,005	0.5%	18,329	-12.9%	-9,264	3.3%	53,862	3.7%	46,907	1.7%	6,955	0.8%	0.4%	0.0%	0.0%	-0.6%	0.2%	NA
LDC_S Asia	-0.1%	-754	-0.1%	-688	-0.8%	-133	-0.7%	-1,294	-0.8%	-1,303	0.9%	9	-0.1%	-0.1%	-0.1%	0.1%	0.1%	-0.1%	NA
Rest S Asia	0.0%	-38	0.0%	-120	-0.1%	-18	-0.2%	-257	-0.2%	-278	0.1%	21	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	NA
US	0.0%	-226	0.0%	-460	0.0%	44	-0.1%	-1,916	0.0%	-1,503	0.0%	-413	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	NA
UK	0.0%	-230	0.0%	-428	-0.1%	-7	-0.1%	-1,507	-0.1%	-1,499	0.0%	-8	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	NA
China	0.0%	-3,996	0.0%	-2,873	-0.2%	-232	-0.1%	-5,284	-0.1%	-6,268	0.1%	984	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	NA
Japan	0.0%	-215	0.0%	-336	0.0%	-8	0.0%	-642	0.0%	-539	-0.1%	-103	0.0%	0.0%	0.0%	0.0%	-0.1%	0.0%	NA
S Korea	0.0%	-426	0.0%	-421	0.0%	-12	-0.1%	-1,006	-0.1%	-999	0.6%	-7	0.0%	0.0%	0.0%	0.0%	-0.1%	0.0%	NA
Russia/Belarus	0.0%	-99	0.0%	-90	0.0%	-1	0.0%	-178	0.0%	-150	0.0%	-28	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	NA
ASEAN	0.0%	-1,482	0.0%	-1,269	-0.2%	-87	-0.1%	-2,880	-0.1%	-2,795	0.3%	-85	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	NA
Türkiye	0.0%	-505	0.0%	-560	-0.2%	-14	-0.1%	-733	-0.2%	-811	0.3%	78	0.0%	0.0%	0.0%	0.1%	0.2%	0.0%	NA
LDC_SE Asia	-0.1%	-118	-0.1%	-79	-0.2%	-7	-0.2%	-236	-0.2%	-216	-0.1%	-20	-0.1%	-0.1%	-0.1%	0.1%	0.1%	0.0%	NA
Rest LDC	0.0%	-151	0.0%	-243	0.0%	-19	-0.1%	-306	-0.1%	-393	0.1%	87	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	NA
Rest OECD	0.0%	-303	0.0%	-588	0.0%	-9	0.0%	-603	0.0%	-763	0.1%	160	0.0%	0.0%	0.0%	0.0%	-0.1%	0.0%	NA
ROW	0.0%	-2,168	0.0%	-2,155	-0.1%	-119	-0.1%	-4,559	-0.1%	-4,849	1.7%	290	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	NA
		53,822		31,775		-13,175		60,995		60,874		121							

Table 3: Sectoral effects – ambitious scenario

Sectors		Total trade (value of and change in exports)				Bilateral trade (value of and change in exports)				Total output (value of and change in production)				Employment unskilled and skilled workers (% change)				CO2 sectoral effects (% change and change in mln)		
		EU		India		EU-India		India-EU		EU		India		EU		India		EU	India	RoW
		Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	EU-IND Change (%)	EU-IND Change (€ mln)	IND-EU Change (%)	IND-EU Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	UnskWor Change %	SkWor Change %	UnskWor Change %	SkWor Change %	Change (%)	Change (%)	Change (%)
1	Rice	-5.6%	-110	-1.5%	-408	71.5%	1	62.4%	490	-6.9%	-349	0.0%	-27	-7.9%	-7.1%	-0.7%	0.3%	-7.1%	0.3%	0.0%
2	Grains	-0.4%	-126	-3.4%	-90	99.1%	1	195.1%	20	-0.2%	-177	0.0%	14	-0.3%	-0.2%	-0.6%	0.5%	-0.3%	0.2%	0.0%
3	Veg & fruits	-0.2%	-74	2.9%	74	192.5%	116	68.1%	152	-0.2%	-192	-0.1%	-213	-0.3%	-0.2%	-0.8%	0.3%	-0.2%	0.1%	0.0%
4	Veg oils	-1.2%	-580	10.0%	2,098	166.6%	88	98.3%	2,890	-1.3%	-1,382	0.5%	996	-1.6%	-1.4%	-0.2%	0.8%	-1.4%	0.7%	-0.1%
5	Sugar	0.8%	106	0.8%	45	368.1%	187	176.7%	266	-0.1%	-36	0.0%	13	-0.2%	-0.1%	-0.7%	0.3%	-0.1%	0.3%	0.0%
6	Rest Agrifood	2.5%	824	3.0%	212	326.9%	1,257	163.4%	626	0.2%	188	0.1%	198	0.2%	0.1%	-0.5%	0.6%	0.1%	0.4%	0.1%
7	Meat	-0.2%	-293	-4.6%	-695	239.1%	78	153.4%	119	-0.1%	-368	0.2%	190	-0.2%	-0.1%	-0.6%	0.5%	-0.1%	0.4%	0.0%
8	Dairy	-0.3%	-255	12.1%	318	390.2%	105	202.1%	486	-0.1%	-604	0.3%	763	-0.3%	-0.2%	-0.3%	0.7%	-0.1%	0.6%	0.0%
9	Forestry	0.5%	56	0.5%	2	56.1%	106	25.3%	14	0.0%	35	-0.3%	-275	-0.1%	0.0%	-1.2%	-0.1%	0.1%	-0.2%	0.0%
10	Fish	0.0%	0	3.4%	19	81.9%	12	22.8%	31	0.0%	-10	0.0%	6	-0.2%	-0.1%	-0.6%	0.5%	0.0%	0.2%	0.0%
11	Fossil fuels	0.0%	-59	-0.4%	-472	59.7%	369	13.6%	1,032	-0.1%	-687	-0.2%	-1,860	-0.1%	-0.1%	-0.5%	-0.7%	-0.1%	-0.2%	0.0%
12	Minerals	6.9%	6,263	3.8%	466	15.4%	7,003	13.2%	276	2.3%	4,144	-0.2%	-55	2.2%	2.2%	-1.6%	-0.5%	1.7%	-1.5%	-0.1%
13	Food products	0.3%	826	7.4%	719	213.9%	1,438	85.6%	986	0.0%	-21	0.2%	333	-0.1%	0.0%	-0.6%	0.5%	0.0%	0.5%	0.0%
14	Bev & Tob	0.3%	338	4.9%	119	335.2%	466	38.5%	150	0.1%	415	0.4%	262	0.0%	0.1%	-0.4%	0.7%	0.1%	0.5%	0.0%
15	Textiles	-1.1%	-1,215	9.4%	6,214	296.2%	1,412	112.6%	8,402	-2.4%	-6,000	3.6%	11,171	-2.5%	-2.3%	2.7%	3.8%	-2.4%	3.6%	-0.3%
16	Wearing & Apparel	-2.3%	-3,346	42.8%	22,366	273.5%	384	148.4%	23,974	-2.9%	-5,606	15.4%	16,014	-3.1%	-2.8%	15.1%	16.2%	-3.0%	15.8%	-0.5%
17	Leather	-0.5%	-547	28.7%	4,800	223.7%	970	80.6%	5,346	-1.1%	-1,728	7.0%	3,651	-1.2%	-1.0%	6.5%	7.6%	-1.1%	7.3%	-0.5%
18	Wood	0.3%	252	3.4%	24	186.0%	541	41.6%	48	0.0%	-3	-1.3%	-466	-0.1%	0.0%	-1.9%	-0.9%	0.0%	-1.2%	0.0%
19	Paper	2.1%	4,414	4.5%	149	153.5%	4,957	78.1%	167	0.4%	2,569	-4.7%	-4,090	0.4%	0.5%	-5.3%	-4.3%	0.5%	-4.8%	0.0%
20	Chemicals	1.6%	14,040	22.5%	16,919	181.3%	21,747	130.5%	16,286	0.2%	2,140	1.0%	3,375	0.3%	0.3%	0.3%	1.4%	0.3%	1.2%	-0.2%
21	Pharmaceuticals	0.0%	150	6.3%	5,306	187.5%	3,322	72.9%	6,158	-0.3%	-1,358	1.1%	1,273	-0.4%	-0.3%	0.0%	1.0%	-0.2%	1.0%	0.0%
22	Rubber & plastics	0.8%	2,314	13.5%	2,236	205.5%	3,498	76.7%	2,345	0.1%	350	-0.4%	-685	0.0%	0.1%	-1.1%	0.0%	0.1%	-0.5%	0.0%
23	Mineral products	0.7%	718	8.8%	740	179.1%	1,300	53.0%	765	-0.1%	-239	0.2%	352	-0.1%	0.0%	-0.9%	0.2%	0.0%	0.1%	0.0%
24	Ferrous metals	-0.1%	-154	10.2%	4,525	83.1%	2,103	55.5%	4,750	-0.5%	-2,616	0.1%	435	-0.6%	-0.5%	-0.9%	0.1%	-0.4%	0.1%	0.0%
25	Non-Ferrous Metals	3.0%	6,083	6.3%	2,763	339.4%	8,013	71.2%	956	0.8%	2,351	1.0%	1,353	1.2%	1.2%	0.4%	1.4%	1.2%	0.9%	-0.2%
26	Metal products	1.0%	2,243	14.1%	2,942	213.0%	3,774	62.8%	2,849	-0.1%	-497	-0.1%	-158	-0.1%	0.0%	-0.7%	0.3%	0.0%	-0.3%	0.0%
27	Electronics & elect eq	1.0%	10,123	12.6%	6,919	179.0%	17,548	72.2%	6,696	0.2%	2,612	-1.1%	-4,432	0.2%	0.2%	-1.8%	-0.8%	0.2%	-1.2%	0.0%
28	Machinery	1.5%	11,540	11.7%	6,032	174.1%	17,214	71.0%	6,100	0.3%	4,142	-2.5%	-8,497	0.3%	0.4%	-3.1%	-2.1%	0.4%	-2.5%	0.0%
29	Motor vehicles	0.2%	2,608	14.4%	6,993	188.3%	6,605	114.2%	6,938	0.0%	186	0.7%	1,509	-0.1%	0.0%	0.2%	1.2%	0.0%	0.7%	0.0%
30	Transport equipment	0.3%	969	8.7%	4,303	102.4%	3,073	126.9%	4,522	-0.1%	-465	1.4%	2,301	-0.2%	-0.1%	0.8%	1.8%	-0.1%	1.3%	0.0%
31	Other manufactures	0.6%	1,839	9.4%	8,362	153.9%	4,785	50.4%	6,877	-0.3%	-1,875	2.1%	5,731	-0.3%	-0.3%	1.4%	2.4%	-0.2%	1.6%	-0.1%
32	Other services	-0.4%	-3,185	-2.2%	-2,862	5.1%	461	-0.2%	-71	0.1%	11,052	0.4%	17,571	0.0%	0.0%	0.3%	0.2%	0.1%	0.4%	0.0%
33	Trade	-0.4%	-952	-2.1%	-460	2.3%	13	0.5%	33	0.0%	911	0.5%	6,027	-0.1%	0.0%	-0.6%	0.4%	0.1%	0.7%	0.0%
34	Transport services	-0.2%	-1,076	-2.2%	-970	4.7%	461	-0.8%	-74	0.0%	-262	0.4%	3,063	-0.1%	0.0%	-0.3%	0.7%	0.0%	0.4%	0.0%
35	Other bus services	-0.2%	-997	-1.6%	-7,589	4.5%	612	0.2%	235	0.0%	-1,327	-1.1%	-6,186	-0.2%	-0.1%	-0.3%	-1.4%	0.0%	-1.3%	0.1%
			52,740		92,120		114,020		110,841		5,293		49,660							

Table 4: Sectoral effects – conservative scenario

Sectors		Total trade (value of and change in exports)				Bilateral trade (value of and change in exports)				Total output (value of and change in production)				Employment unskilled and skilled workers (% change)				CO2 sectoral effects (% change and change in mln)		
		EU		India		EU-India		India-EU		EU		India		EU		India		EU	India	RoW
		Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	EU-IND Change (%)	EU-IND Change (€ mln)	IND-EU Change (%)	IND-EU Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	UnskWor Change %	SkWor Change %	UnskWor Change %	SkWor Change %	Change (%)	Change (%)	Change (%)
1	Rice	-2.1%	-41	-1.3%	-353	33.6%	0	22.0%	173	-2.5%	-130	-0.1%	-172	-2.9%	-2.6%	-0.5%	0.1%	-2.6%	0.1%	0.0%
2	Grains	-0.3%	-75	-2.0%	-52	42.7%	1	89.1%	9	-0.1%	-98	-0.1%	-102	-0.2%	-0.1%	-0.5%	0.1%	-0.1%	0.0%	0.0%
3	Veg & fruits	-0.1%	-26	0.6%	14	129.5%	78	26.5%	59	-0.1%	-88	-0.2%	-235	-0.1%	-0.1%	-0.5%	0.1%	-0.1%	0.0%	0.0%
4	Veg oils	-0.5%	-262	3.7%	768	90.1%	48	41.0%	1,206	-0.6%	-617	0.1%	162	-0.7%	-0.6%	-0.3%	0.2%	-0.6%	0.2%	0.0%
5	Sugar	0.5%	71	-0.9%	-55	197.1%	100	47.6%	72	0.1%	26	-0.1%	-167	0.0%	0.1%	-0.6%	0.0%	0.1%	0.0%	0.0%
6	Rest Agrifood	1.4%	439	-0.2%	-14	176.3%	678	62.4%	239	0.1%	118	0.1%	96	0.1%	0.1%	-0.3%	0.3%	0.1%	0.2%	0.0%
7	Meat	-0.2%	-183	-2.9%	-438	150.6%	49	54.7%	42	0.0%	-216	0.0%	30	-0.1%	0.0%	-0.4%	0.2%	0.0%	0.2%	0.0%
8	Dairy	-0.2%	-126	1.4%	37	206.7%	55	56.6%	136	-0.1%	-205	0.1%	248	-0.1%	-0.1%	-0.3%	0.3%	0.0%	0.3%	0.0%
9	Forestry	0.4%	49	0.0%	0	43.8%	83	11.9%	6	0.0%	35	-0.2%	-186	0.0%	0.1%	-0.7%	-0.1%	0.1%	-0.1%	0.0%
10	Fish	0.0%	2	2.6%	15	71.8%	10	15.8%	22	0.0%	-5	0.0%	-3	-0.1%	0.0%	-0.4%	0.2%	0.0%	0.1%	0.0%
11	Fossil fuels	0.0%	59	0.1%	154	59.1%	365	14.2%	1,076	0.0%	-531	-0.1%	-1,214	-0.1%	-0.1%	-0.3%	-0.4%	0.0%	-0.1%	0.0%
12	Minerals	5.7%	5,129	2.7%	335	12.7%	5,794	7.6%	159	1.8%	3,232	-0.2%	-66	2.1%	2.1%	-1.0%	-0.4%	1.6%	-1.3%	-0.1%
13	Food products	0.2%	598	2.0%	194	142.0%	954	29.9%	344	0.0%	139	-0.1%	-115	0.0%	0.0%	-0.5%	0.0%	0.0%	0.1%	0.0%
14	Bev & Tob	0.2%	254	1.6%	40	243.3%	338	14.9%	58	0.1%	287	0.1%	51	0.0%	0.1%	-0.3%	0.2%	0.1%	0.1%	0.0%
15	Textiles	-0.9%	-958	6.6%	4,339	177.7%	847	76.1%	5,678	-1.7%	-4,210	2.5%	7,820	-1.7%	-1.6%	2.1%	2.7%	-1.7%	2.6%	-0.2%
16	Wearing & Apparel	-1.6%	-2,342	29.2%	15,239	154.3%	217	100.4%	16,222	-2.0%	-3,891	10.5%	10,904	-2.1%	-2.0%	11.0%	11.5%	-2.1%	11.3%	-0.4%
17	Leather	-0.2%	-260	16.6%	2,772	149.0%	646	46.6%	3,090	-0.6%	-971	4.0%	2,076	-0.6%	-0.6%	3.9%	4.5%	-0.6%	4.3%	-0.3%
18	Wood	0.2%	162	1.1%	8	116.8%	340	18.9%	22	0.0%	18	-0.9%	-305	0.0%	0.0%	-1.2%	-0.6%	0.0%	-0.8%	0.0%
19	Paper	1.2%	2,662	1.8%	62	92.4%	2,985	32.8%	70	0.2%	1,583	-2.9%	-2,555	0.3%	0.3%	-3.3%	-2.7%	0.3%	-3.0%	0.0%
20	Chemicals	0.9%	7,626	12.9%	9,675	102.8%	12,338	74.2%	9,258	0.1%	838	0.6%	2,131	0.2%	0.2%	0.3%	0.9%	0.2%	0.8%	-0.1%
21	Pharmaceuticals	0.0%	177	2.8%	2,376	108.9%	1,930	33.6%	2,836	-0.1%	-642	0.2%	181	-0.2%	-0.1%	-0.4%	0.2%	-0.1%	0.2%	0.0%
22	Rubber & plastics	0.5%	1,263	5.9%	980	109.7%	1,866	34.2%	1,046	0.1%	305	-0.3%	-580	0.1%	0.1%	-0.7%	-0.1%	0.1%	-0.4%	0.0%
23	Mineral products	0.4%	375	4.7%	397	102.9%	747	26.9%	388	0.0%	-166	0.1%	205	-0.1%	0.0%	-0.5%	0.1%	0.0%	0.0%	0.0%
24	Ferrous metals	0.1%	159	4.7%	2,097	53.7%	1,361	24.8%	2,126	-0.2%	-1,047	-0.1%	-373	-0.2%	-0.2%	-0.6%	-0.1%	-0.2%	-0.2%	0.0%
25	Non-Ferrous Metals	0.8%	1,626	5.0%	2,229	136.0%	3,210	42.8%	574	0.0%	28	1.8%	2,334	0.1%	0.2%	1.5%	2.0%	0.2%	1.6%	-0.1%
26	Metal products	0.5%	1,206	6.7%	1,397	118.2%	2,094	28.1%	1,274	0.0%	-129	-0.1%	-217	0.0%	0.0%	-0.4%	0.1%	0.0%	-0.3%	0.0%
27	Electronics & elect eq	0.5%	4,860	5.5%	3,041	95.2%	9,330	31.2%	2,897	0.1%	938	-0.8%	-3,007	0.1%	0.1%	-1.2%	-0.6%	0.1%	-0.8%	0.0%
28	Machinery	0.8%	6,579	5.2%	2,674	100.9%	9,979	30.7%	2,634	0.2%	2,586	-1.7%	-5,658	0.2%	0.3%	-2.0%	-1.4%	0.3%	-1.7%	0.0%
29	Motor vehicles	0.1%	1,502	8.4%	4,073	115.5%	4,053	65.9%	4,006	0.0%	46	0.2%	548	0.0%	0.0%	0.1%	0.6%	0.0%	0.3%	0.0%
30	Transport equipment	0.2%	650	4.5%	2,231	65.4%	1,961	63.6%	2,267	0.0%	-140	0.5%	865	-0.1%	0.0%	0.3%	0.8%	0.0%	0.5%	0.0%
31	Other manufactures	0.3%	959	5.5%	4,903	86.6%	2,693	24.0%	3,273	-0.1%	-914	1.4%	3,758	-0.2%	-0.1%	1.0%	1.6%	-0.1%	1.0%	-0.1%
32	Other services	-0.2%	-1,913	-1.0%	-1,234	4.0%	362	0.9%	379	0.0%	5,641	0.2%	9,613	0.0%	0.0%	0.2%	0.1%	0.1%	0.2%	0.0%
33	Trade	-0.3%	-580	-0.9%	-207	1.3%	8	1.5%	94	0.0%	472	0.2%	3,176	-0.1%	0.0%	-0.4%	0.2%	0.0%	0.4%	0.0%
34	Transport services	-0.1%	-554	-1.2%	-525	3.8%	370	0.1%	8	0.0%	-37	0.2%	1,632	-0.1%	0.0%	-0.2%	0.3%	0.0%	0.2%	0.0%
35	Other bus services	-0.1%	-553	-0.7%	-3,311	3.9%	529	1.0%	1,504	0.0%	-1,277	-0.5%	-2,854	-0.1%	-0.1%	-1.2%	-0.7%	0.0%	-0.7%	0.0%
			28,534		53,862		66,421		63,246		978		28,019							

Table 5: Effects for Least Developed Countries (LDCs) – ambitious scenario

Sectors	Total trade (value of and change in exports)				Total trade (value of and change in exports)				Total output (value of and change in production)				Total output (value of and change in production)				Employment unskilled and skilled workers (% change)				Employment unskilled and skilled workers (% change)				
	R_SA		LDC_SA		LDC_SEA		LDC_R		R_SA		LDC_SA		LDC_SEA		LDC_R		R_SA		LDC_SA		LDC_SEA		LDC-R		
	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	UnskWor Change %	SkWor Change %	UnskWor Change %	SkWor Change %	UnskWor Change %	SkWor Change %	UnskWor Change %	SkWor Change %	
1 Rice	0.3%	14	-0.8%	-1	-4.0%	-11	-1.7%	-7	0.1%	17	0.0%	38	0.0%	-3	0.3%	122	0.1%	0.1%	0.1%	0.1%	0.0%	0.0%	0.4%	0.4%	
2 Grains	0.6%	0	1.0%	0	0.1%	0	0.0%	0	0.0%	4	0.6%	29	0.1%	1	0.0%	6	0.0%	0.0%	0.7%	0.7%	0.1%	0.2%	0.0%	0.0%	
3 Veg & fruits	0.7%	11	2.4%	15	1.1%	36	0.7%	28	0.0%	1	0.2%	27	0.2%	23	0.0%	23	0.0%	0.0%	0.3%	0.3%	0.3%	0.4%	0.0%	0.1%	
4 Veg oils	0.0%	0	1.7%	10	0.0%	0	-0.1%	-15	0.1%	23	0.5%	73	0.3%	4	0.0%	-10	0.1%	0.2%	0.6%	0.6%	0.3%	0.4%	-0.1%	0.0%	
5 Sugar	-0.2%	-2	2.0%	1	0.2%	0	-0.2%	-5	0.1%	9	0.3%	22	0.1%	1	0.2%	44	0.1%	0.1%	0.4%	0.4%	0.1%	0.2%	0.2%	0.2%	
6 Rest Agrifood	1.1%	29	1.6%	10	0.9%	4	0.3%	18	0.0%	17	0.5%	60	0.1%	4	0.1%	17	0.0%	0.1%	0.6%	0.6%	0.1%	0.2%	0.1%	0.1%	
7 Meat	1.0%	8	2.1%	8	0.9%	1	0.0%	1	-0.1%	-21	0.0%	-11	0.1%	16	0.0%	23	-0.1%	-0.1%	0.0%	0.0%	0.1%	0.2%	0.0%	0.0%	
8 Dairy	-0.3%	0	2.2%	10	0.4%	0	0.0%	0	0.0%	10	0.0%	11	0.2%	1	0.0%	6	0.0%	0.0%	0.1%	0.1%	0.1%	0.2%	0.0%	0.0%	
9 Forestry	0.4%	1	2.8%	7	0.1%	6	0.0%	0	0.0%	1	0.0%	3	0.0%	2	0.0%	-1	0.0%	0.0%	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	
10 Fish	0.1%	0	0.8%	3	0.1%	0	-0.1%	0	0.0%	0	0.0%	-1	0.0%	1	0.0%	0	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	
11 Fossil fuels	0.1%	1	0.2%	3	0.0%	4	0.0%	-16	0.1%	17	0.1%	10	0.0%	3	0.0%	51	0.1%	0.1%	0.2%	0.3%	0.1%	0.1%	0.0%	0.0%	
12 Minerals	-0.3%	-3	-1.6%	-4	-0.1%	-3	-0.1%	-24	0.0%	2	0.0%	5	0.0%	1	-0.1%	-25	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	-0.2%	-0.1%	
13 Food products	-0.2%	-8	0.2%	5	0.2%	1	0.0%	-2	0.0%	-8	-0.1%	-29	0.0%	2	0.0%	-18	-0.1%	-0.1%	-0.1%	-0.1%	0.0%	0.0%	0.0%	0.0%	
14 Bev & Tob	-0.2%	0	-1.0%	-9	0.1%	0	0.0%	1	0.0%	1	-0.2%	-29	0.0%	-2	0.0%	-13	0.0%	0.0%	-0.1%	-0.1%	-0.1%	0.0%	0.0%	0.0%	
15 Textiles	-0.7%	-110	0.1%	5	0.0%	0	-0.9%	-15	-0.1%	-55	-0.2%	-114	-0.7%	-50	0.1%	12	-0.2%	-0.2%	-0.2%	-0.2%	-0.8%	-0.7%	0.0%	0.0%	
16 Wearing & Apparel	-1.8%	-396	-1.8%	-2,387	-1.4%	-504	-2.1%	-71	-1.0%	-286	-1.6%	-1700	-1.2%	-358	-0.2%	-40	-1.2%	-1.2%	-1.6%	-1.6%	-1.4%	-1.2%	-0.3%	-0.3%	
17 Leather	-0.7%	-20	0.1%	5	-0.7%	-19	-1.1%	-13	-0.2%	-12	0.0%	4	-0.3%	-18	-0.1%	-10	-0.3%	-0.3%	0.1%	0.1%	-0.4%	-0.3%	-0.1%	-0.1%	
18 Wood	-0.5%	-3	1.0%	1	-0.1%	-2	-0.1%	-3	0.1%	3	0.5%	23	0.0%	-2	0.0%	-1	0.0%	0.0%	0.5%	0.5%	-0.1%	0.0%	0.0%	0.0%	
19 Paper	-2.9%	-26	-0.3%	0	0.2%	0	-0.2%	-1	0.0%	-4	0.4%	39	0.0%	0	0.0%	1	-0.1%	-0.1%	0.4%	0.4%	-0.1%	0.0%	0.0%	0.0%	
20 Chemicals	-0.5%	-22	-3.7%	-28	-0.1%	0	-0.8%	-70	0.0%	14	0.3%	47	-0.1%	-1	-0.2%	-72	0.0%	0.0%	0.3%	0.3%	-0.1%	-0.1%	-0.3%	-0.2%	
21 Pharmaceuticals	0.3%	1	0.7%	3	-0.1%	0	-0.5%	-1	0.2%	22	0.8%	43	0.3%	0	0.2%	13	0.1%	0.2%	0.8%	0.8%	0.2%	0.3%	0.2%	0.2%	
22 Rubber & plastics	0.1%	3	-2.3%	-19	0.2%	1	-0.2%	-3	0.1%	10	0.0%	1	0.1%	1	0.0%	-7	0.1%	0.1%	-0.1%	-0.1%	0.1%	0.2%	-0.1%	0.0%	
23 Mineral products	-0.7%	-14	1.3%	6	0.3%	0	-0.1%	-1	0.0%	-2	0.2%	46	0.1%	5	0.0%	-1	-0.1%	0.0%	0.3%	0.3%	0.1%	0.1%	0.0%	0.0%	
24 Ferrous metals	0.0%	0	0.4%	7	0.1%	1	-0.6%	-11	0.2%	13	0.6%	82	0.1%	6	-0.1%	-12	0.1%	0.1%	0.6%	0.6%	0.1%	0.2%	-0.2%	-0.1%	
25 Non-Ferrous Metals	-0.1%	-2	0.0%	0	0.1%	1	-0.5%	-375	0.0%	-1	0.2%	89	0.1%	2	-0.4%	-201	-0.1%	-0.1%	0.3%	0.3%	0.0%	0.1%	-0.5%	-0.5%	
26 Metal products	-0.2%	-2	1.8%	10	0.3%	0	-0.1%	-1	0.1%	4	0.4%	51	0.1%	3	-0.1%	-13	0.0%	0.0%	0.5%	0.5%	0.1%	0.1%	-0.1%	-0.1%	
27 Electronics & elect eq	-0.4%	-7	2.4%	32	0.2%	9	-0.3%	-5	0.1%	13	1.3%	111	0.2%	25	-0.1%	-16	0.1%	0.1%	1.4%	1.4%	0.1%	0.2%	-0.1%	-0.1%	
28 Machinery	0.0%	0	1.8%	6	0.3%	1	-0.2%	-2	0.3%	9	1.1%	89	0.2%	7	0.0%	-1	0.2%	0.2%	1.2%	1.2%	0.1%	0.2%	0.0%	0.0%	
29 Motor vehicles	0.0%	0	1.5%	2	0.1%	0	-0.1%	-1	0.1%	12	0.5%	20	0.0%	4	0.0%	-5	0.1%	0.1%	0.5%	0.5%	0.0%	0.1%	-0.1%	0.0%	
30 Transport equipment	-1.4%	-8	2.0%	16	-0.2%	-2	-0.4%	-15	0.2%	8	0.7%	61	0.0%	0	-0.2%	-14	0.2%	0.2%	0.8%	0.8%	-0.1%	0.0%	-0.2%	-0.2%	
31 Other manufactures	0.1%	5	2.2%	21	0.1%	11	-0.5%	-19	0.1%	18	0.8%	39	0.0%	5	-0.1%	-23	0.0%	0.0%	0.9%	0.9%	0.0%	0.1%	-0.1%	-0.1%	
32 Other services	0.5%	64	1.8%	212	0.7%	55	0.2%	62	0.0%	102	0.0%	58	0.0%	23	0.0%	-37	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	
33 Trade	0.5%	3	1.5%	10	0.7%	12	0.1%	3	0.0%	29	-0.1%	-87	0.0%	-7	0.0%	-111	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	-0.1%	0.0%	
34 Transport services	0.5%	55	1.6%	73	0.4%	43	0.1%	18	0.0%	27	0.0%	4	0.1%	21	0.0%	-23	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	
35 Other bus services	0.7%	22	1.7%	49	0.7%	8	0.3%	19	0.3%	53	0.7%	72	0.2%	17	0.1%	128	0.3%	0.3%	0.8%	0.8%	0.2%	0.3%	0.1%	0.1%	
		-403		-1,923		-347		-523		52		-811		-264		-209									

Table 6: Effects for Least Developed Countries (LDCs) – conservative scenario


Sectors		Total trade (value of and change in exports)				Total trade (value of and change in exports)				Total output (value of and change in production)				Total output (value of and change in production)				Employment unskilled and skilled workers (% change)				Employment unskilled and skilled workers (% change)			
		R_SA		LDC_SA		LDC_SEA		LDC_R		R_SA		LDC_SA		LDC_SEA		LDC_R		R_SA		LDC_SA		LDC_SEA		LDC-R	
		Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	UnskWor Change %	SkWor Change %	UnskWor Change %	SkWor Change %	UnskWor Change %	SkWor Change %	UnskWor Change %	SkWor Change %
1	Rice	0.4%	20	0.5%	1	-1.2%	-3	-0.6%	-2	0.0%	14	0.0%	21	0.0%	0	0.2%	73	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%	0.2%	0.2%
2	Grains	0.3%	0	0.8%	0	0.1%	0	0.0%	0	0.0%	3	0.4%	19	0.1%	1	0.0%	4	0.0%	0.0%	0.4%	0.4%	0.1%	0.1%	0.0%	0.0%
3	Veg & fruits	0.4%	6	1.4%	9	0.6%	21	0.4%	15	0.0%	-1	0.1%	17	0.1%	13	0.0%	13	0.0%	0.0%	0.2%	0.2%	0.2%	0.2%	0.0%	0.0%
4	Veg oils	0.0%	0	1.1%	7	0.0%	0	-0.1%	-6	0.1%	14	0.3%	48	0.2%	3	0.0%	-3	0.1%	0.1%	0.4%	0.4%	0.2%	0.3%	0.0%	0.0%
5	Sugar	-0.1%	-1	1.4%	1	0.3%	0	0.1%	1	0.0%	5	0.2%	15	0.1%	1	0.1%	27	0.0%	0.0%	0.2%	0.2%	0.1%	0.1%	0.1%	0.1%
6	Rest Agrifood	0.8%	20	1.1%	7	0.6%	3	0.2%	13	0.0%	10	0.3%	40	0.0%	3	0.1%	12	0.0%	0.0%	0.4%	0.4%	0.1%	0.1%	0.1%	0.1%
7	Meat	0.7%	5	1.5%	6	0.6%	0	0.0%	1	-0.1%	-14	0.0%	-6	0.1%	11	0.0%	14	-0.1%	-0.1%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%
8	Dairy	-0.2%	0	1.6%	7	0.3%	0	0.0%	0	0.0%	6	0.0%	7	0.1%	0	0.0%	4	0.0%	0.0%	0.1%	0.1%	0.1%	0.2%	0.0%	0.0%
9	Forestry	0.2%	1	1.6%	4	0.0%	3	0.0%	0	0.0%	1	0.0%	2	0.0%	1	0.0%	-1	0.0%	0.0%	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%
10	Fish	0.1%	0	0.5%	2	0.1%	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%	0.0%	0.0%	0.0%
11	Fossil fuels	0.1%	1	0.2%	2	0.0%	3	0.0%	-12	0.0%	11	0.1%	7	0.0%	2	0.0%	28	0.1%	0.0%	0.2%	0.2%	0.1%	0.1%	0.0%	0.0%
12	Minerals	-0.3%	-2	-1.4%	-4	-0.1%	-2	-0.1%	-23	0.0%	2	0.0%	3	0.0%	1	0.0%	-15	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	-0.1%	-0.1%
13	Food products	-0.1%	-7	0.1%	2	0.1%	1	0.0%	0	0.0%	-5	-0.1%	-18	0.0%	2	0.0%	-9	0.0%	0.0%	-0.1%	-0.1%	0.0%	0.0%	0.0%	0.0%
14	Bev & Tob	-0.2%	-1	-1.1%	-10	0.1%	0	0.0%	1	0.0%	1	-0.1%	-23	0.0%	-1	0.0%	-8	0.0%	0.0%	-0.1%	-0.1%	-0.1%	0.0%	0.0%	0.0%
15	Textiles	-0.5%	-75	0.1%	4	0.0%	0	-0.6%	-11	-0.1%	-39	-0.1%	-75	-0.5%	-34	0.0%	5	-0.1%	-0.1%	-0.1%	-0.1%	-0.5%	-0.5%	0.0%	0.0%
16	Wearing & Apparel	-1.2%	-274	-1.2%	-1,634	-1.0%	-350	-1.5%	-49	-0.7%	-198	-1.1%	-1163	-0.8%	-248	-0.2%	-29	-0.8%	-0.8%	-1.1%	-1.1%	-0.9%	-0.9%	-0.2%	-0.2%
17	Leather	-0.4%	-11	0.2%	13	-0.4%	-10	-0.7%	-8	-0.1%	-6	0.1%	11	-0.2%	-9	-0.1%	-6	-0.2%	-0.1%	0.1%	0.1%	-0.2%	-0.2%	-0.1%	-0.1%
18	Wood	-0.4%	-2	0.7%	1	0.0%	-1	-0.1%	-2	0.1%	2	0.3%	16	0.0%	0	0.0%	-1	0.0%	0.0%	0.4%	0.4%	0.0%	0.0%	0.0%	0.0%
19	Paper	-1.8%	-16	-0.1%	0	0.1%	0	-0.1%	-1	0.0%	-2	0.3%	27	0.0%	0	0.0%	0	-0.1%	0.0%	0.3%	0.3%	0.0%	0.0%	0.0%	0.0%
20	Chemicals	-0.3%	-11	-2.0%	-15	0.0%	0	-0.5%	-40	0.0%	14	0.2%	37	0.0%	0	-0.1%	-41	0.0%	0.0%	0.2%	0.2%	-0.1%	0.0%	-0.1%	-0.1%
21	Pharmaceuticals	0.2%	1	0.6%	2	0.1%	0	-0.3%	-1	0.1%	15	0.5%	29	0.2%	0	0.1%	8	0.1%	0.1%	0.6%	0.6%	0.2%	0.2%	0.1%	0.1%
22	Rubber & plastics	0.1%	4	-1.2%	-10	0.2%	1	-0.1%	-1	0.1%	9	0.1%	3	0.1%	1	0.0%	-4	0.1%	0.1%	0.0%	0.0%	0.1%	0.2%	0.0%	0.0%
23	Mineral products	-0.5%	-10	0.9%	5	0.2%	0	0.0%	-1	0.0%	-3	0.2%	32	0.1%	4	0.0%	0	0.0%	0.0%	0.2%	0.2%	0.0%	0.1%	0.0%	0.0%
24	Ferrous metals	0.0%	0	0.2%	3	0.1%	1	-0.4%	-8	0.1%	8	0.4%	52	0.1%	5	-0.1%	-9	0.1%	0.1%	0.4%	0.4%	0.1%	0.1%	-0.1%	-0.1%
25	Non-Ferrous Metals	0.0%	0	0.5%	7	0.1%	1	-0.3%	-211	0.0%	0	0.2%	67	0.1%	2	-0.2%	-115	0.0%	0.0%	0.2%	0.2%	0.0%	0.1%	-0.3%	-0.3%
26	Metal products	-0.1%	-1	1.4%	7	0.3%	0	-0.1%	0	0.1%	3	0.3%	36	0.1%	3	0.0%	-9	0.0%	0.0%	0.4%	0.4%	0.1%	0.1%	-0.1%	0.0%
27	Electronics & elect eq	-0.2%	-3	1.7%	23	0.2%	8	-0.2%	-3	0.1%	12	0.9%	79	0.1%	20	0.0%	-8	0.1%	0.1%	1.0%	1.0%	0.1%	0.2%	-0.1%	0.0%
28	Machinery	0.1%	1	1.4%	4	0.2%	1	-0.1%	-1	0.2%	7	0.8%	62	0.1%	5	0.0%	1	0.2%	0.2%	0.8%	0.8%	0.1%	0.2%	0.0%	0.0%
29	Motor vehicles	0.0%	0	1.1%	1	0.1%	0	-0.1%	0	0.1%	8	0.3%	14	0.0%	3	0.0%	-3	0.0%	0.0%	0.4%	0.4%	0.0%	0.0%	0.0%	0.0%
30	Transport equipment	-0.9%	-5	1.5%	11	0.0%	0	-0.2%	-7	0.1%	2	0.5%	41	0.0%	1	-0.1%	-7	0.0%	0.0%	0.5%	0.5%	0.0%	0.1%	-0.1%	-0.1%
31	Other manufactures	0.1%	7	1.5%	15	0.0%	8	-0.4%	-13	0.1%	14	0.5%	26	0.0%	4	-0.1%	-16	0.0%	0.0%	0.6%	0.6%	0.0%	0.0%	-0.1%	-0.1%
32	Other services	0.3%	43	1.2%	144	0.4%	37	0.1%	37	0.0%	68	0.0%	44	0.0%	14	0.0%	-29	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
33	Trade	0.4%	2	1.0%	7	0.5%	8	0.1%	2	0.0%	19	0.0%	-58	0.0%	-4	0.0%	-67	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
34	Transport services	0.3%	37	1.1%	49	0.2%	29	0.1%	11	0.0%	18	0.0%	5	0.0%	14	0.0%	-13	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%
35	Other bus services	0.4%	14	1.1%	33	0.4%	5	0.2%	11	0.2%	34	0.5%	48	0.2%	11	0.1%	78	0.2%	0.2%	0.5%	0.5%	0.1%	0.2%	0.1%	0.1%
			-257		-1,294		-236		-306		30		-535		-173		-129								

Table 7: Effects for Türkiye – ambitious scenario

Sectors		Total trade (value of and change in exports)		Total output (value & change production)		Employment unsk & sk workers (% change)	
		Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	UnskWor Change %	SkWor Change %
1	Rice	-0.4%	0	0.6%	11	0.6%	0.6%
2	Grains	0.7%	1	0.2%	28	0.2%	0.2%
3	Veg & fruits	0.5%	16	0.1%	34	0.1%	0.1%
4	Veg oils	0.3%	5	0.2%	37	0.2%	0.2%
5	Sugar	0.5%	2	0.1%	8	0.1%	0.1%
6	Rest Agrifood	0.7%	7	0.2%	8	0.2%	0.2%
7	Meat	0.9%	22	0.1%	37	0.1%	0.1%
8	Dairy	0.8%	11	0.0%	0	0.0%	0.0%
9	Forestry	0.3%	0	0.1%	3	0.1%	0.1%
10	Fish	0.1%	1	0.0%	0	0.0%	0.0%
11	Fossil fuels	0.1%	6	0.1%	56	0.1%	0.1%
12	Minerals	-0.2%	-16	0.1%	19	0.1%	0.1%
13	Food products	0.4%	55	0.1%	46	0.1%	0.1%
14	Bev & Tob	0.2%	7	0.0%	-7	0.0%	0.0%
15	Textiles	-1.5%	-755	-1.1%	-1544	-1.2%	-1.2%
16	Wearing & Apparel	-3.4%	-1,719	-1.6%	-1582	-1.8%	-1.7%
17	Leather	-0.5%	-24	-0.4%	-64	-0.4%	-0.4%
18	Wood	0.5%	13	0.2%	36	0.3%	0.2%
19	Paper	0.5%	33	0.2%	70	0.2%	0.2%
20	Chemicals	-0.3%	-45	-0.1%	-91	-0.1%	-0.1%
21	Pharmaceuticals	0.3%	15	0.3%	39	0.3%	0.3%
22	Rubber & plastics	0.4%	69	0.2%	102	0.2%	0.2%
23	Mineral products	0.4%	38	0.1%	61	0.1%	0.1%
24	Ferrous metals	0.2%	40	0.3%	218	0.3%	0.3%
25	Non-Ferrous Metals	0.3%	48	0.4%	141	0.4%	0.3%
26	Metal products	0.4%	70	0.2%	99	0.2%	0.2%
27	Electronics & elect eq	0.4%	128	0.3%	163	0.4%	0.3%
28	Machinery	0.4%	67	0.3%	116	0.4%	0.3%
29	Motor vehicles	0.1%	58	0.1%	88	0.1%	0.1%
30	Transport equipment	0.3%	23	0.3%	33	0.3%	0.3%
31	Other manufactures	0.3%	64	0.0%	29	0.1%	0.1%
32	Other services	0.7%	282	0.0%	152	0.0%	0.0%
33	Trade	0.6%	47	0.0%	-27	0.0%	0.0%
34	Transport services	0.5%	302	0.1%	217	0.1%	0.1%
35	Other bus services	0.7%	19	0.1%	68	0.1%	0.1%
			-1,112		-1396		

Table 8: Effects for Türkiye – conservative scenario

Sectors		Total trade (value of and change in exports)		Total output (value & change production)		Employment unsk & sk workers (% change)	
		Change (%)	Change (€ mln)	Change (%)	Change (€ mln)	UnskWor Change %	SkWor Change %
1	Rice	0.0%	0	0.4%	8	0.4%	0.4%
2	Grains	0.5%	0	0.2%	19	0.2%	0.2%
3	Veg & fruits	0.4%	11	0.1%	23	0.1%	0.1%
4	Veg oils	0.3%	5	0.2%	27	0.2%	0.2%
5	Sugar	0.4%	2	0.1%	6	0.1%	0.1%
6	Rest Agrifood	0.6%	5	0.1%	6	0.2%	0.2%
7	Meat	0.6%	15	0.0%	25	0.0%	0.0%
8	Dairy	0.6%	8	0.0%	0	0.0%	0.0%
9	Forestry	0.2%	0	0.0%	2	0.1%	0.1%
10	Fish	0.1%	0	0.0%	0	0.0%	0.0%
11	Fossil fuels	0.1%	4	0.0%	36	0.1%	0.1%
12	Minerals	-0.1%	-12	0.1%	15	0.1%	0.1%
13	Food products	0.3%	41	0.1%	34	0.1%	0.1%
14	Bev & Tob	0.2%	5	0.0%	-5	0.0%	0.0%
15	Textiles	-1.1%	-529	-0.8%	-1089	-0.8%	-0.8%
16	Wearing & Apparel	-2.4%	-1,205	-1.1%	-1109	-1.2%	-1.2%
17	Leather	-0.2%	-12	-0.3%	-39	-0.3%	-0.3%
18	Wood	0.4%	9	0.2%	24	0.2%	0.2%
19	Paper	0.3%	22	0.1%	46	0.1%	0.1%
20	Chemicals	-0.1%	-20	-0.1%	-49	-0.1%	-0.1%
21	Pharmaceuticals	0.3%	14	0.2%	30	0.3%	0.2%
22	Rubber & plastics	0.3%	56	0.1%	77	0.2%	0.1%
23	Mineral products	0.3%	28	0.1%	42	0.1%	0.1%
24	Ferrous metals	0.2%	41	0.2%	169	0.3%	0.2%
25	Non-Ferrous Metals	0.1%	27	0.3%	92	0.2%	0.2%
26	Metal products	0.3%	54	0.1%	73	0.2%	0.2%
27	Electronics & elect eq	0.3%	97	0.2%	119	0.3%	0.3%
28	Machinery	0.3%	53	0.2%	84	0.3%	0.3%
29	Motor vehicles	0.1%	52	0.1%	71	0.1%	0.1%
30	Transport equipment	0.2%	21	0.2%	27	0.3%	0.2%
31	Other manufactures	0.2%	51	0.0%	23	0.1%	0.0%
32	Other services	0.4%	183	0.0%	96	0.0%	0.0%
33	Trade	0.4%	31	0.0%	-20	0.0%	0.0%
34	Transport services	0.3%	199	0.0%	146	0.1%	0.1%
35	Other bus services	0.5%	12	0.0%	45	0.1%	0.0%
			-733		-944		



Annex 2:

Structure of the draft Final Report

Abstract

Table of contents

Acronyms

- 1 Introduction (background for the study and methodology)
- 2 Results of the economic analysis
- 3 Results of the investment analysis
- 4 Results of the social analysis
- 5 Results of the environmental analysis
- 6 Results of the human rights analysis
- 7 Results related to the EU strategic objectives
- 8 Conclusions and recommendations
- 9 Summary of consultation activities

ANNEXES

ANNEX 1: Baselines

ANNEX 2: Tables with results of the CGE and gravity modelling

ANNEX 3: Case studies (summaries will be included into the main report)

ANNEX 4: Consultations Report

ANNEX 5: References

ANNEX 6: Executive summary (EN, FR, DE)

ANNEX 7: Briefing document