



Trade Sustainability Impact Assessment (SIA) in support of Free Trade Agreement (FTA) negotiations between the European Union and the Gulf Cooperation Council countries

ANNEXES

Draft Inception Report

9 March 2026

Prepared by Trade Impact B.V., Gulf Research Council Foundation Brussels, and SQ Consult February 2026



The views expressed in the report are those of the consultant, and do not present an official view of the European Commission.



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ABSTRACT

Following the update of the 1989 EU-GCC negotiating directives of the Council, the European Commission (DG Trade) has initiated, or is envisaged to initiate, negotiations for a Free Trade Agreement (FTA) and/or Strategic Partnership Agreements (SPAs) with the Gulf Cooperation Council (GCC) countries.

This Trade Sustainability Impact Assessment (SIA) in support of the FTA/SPA negotiations between the European Union (EU) and the countries of the member states of the Cooperation Council for the Arab States of the Gulf, namely the State of Bahrain, the State of Kuwait, the Sultanate of Oman, the State of Qatar, the Kingdom of Saudi Arabia, and the United Arab Emirates. In addition to supporting negotiations on a region-to-region FTA, the SIA also covers potential bilateral FTA/SPAs with individual GCC countries.

The study is conducted during 2026-2027 by a consortium comprising Trade Impact (lead partner), the Gulf Research Center Foundation Brussels (partner), and SQ Consult (partner). The consortium applies an ex-ante analytical framework to assess the potential economic, social, environmental, and human rights impacts of the EU-GCC FTA/SPAs. The study consists of a core analytical component and four case studies. Throughout the assessment, desk research will be complemented by extensive engagement with stakeholders.

The purpose of this Inception Report is to present and substantiate the methodological approach adopted to achieve the objectives of the ex-ante SIA. This Inception Report (including Annexes) provides an overview of the key project features and study objectives; describes the phased structure of the work; clarifies the scope of the assessment, including key issues relevant to the negotiations; outlines the proposed methodological framework and data sources; presents the final selection and outline of the case studies; and sets out a draft consultation plan and preliminary list of relevant stakeholders.

With regard to project management, the report also presents the proposed approach to risk management, a list of deliverables, the study plan and timeline, and a draft outline of the structure envisaged for the Final Report.

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ACRONYMS

AEO	Authorised Economic Operator	IUCN	International Union for Conservation of Nature
BIT	Bilateral Investment Treaty	JC	Judgement Criteria
CCA	Causal Chain Analysis	JCC	Joint Cooperation Council
CGE	Computable General Equilibrium	KSA	Kingdom of Saudi Arabia
CH4	Methane (a greenhouse gas)	LDC	Least Developed Country
CITES	Convention on International Trade in Endangered Species	LULUCF	Land use, land use change and forestry
CO	Carbon monoxide	MEA	Multilateral Environmental Agreement
CO2	Carbon dioxide (a greenhouse gas)	MFN	Most-Favoured Nation
CPI	Consumer Price Index	NDC	Nationally Determined Contribution
CRD	Convention on the Rights of the Child	NGO	Non-Governmental Organisation
CSD	Civil Society Dialogue	NH ₃	Ammonia
CSR	Corporate Social Responsibility	NMVOC	Non-methane volatile organic compound
DAG	Domestic Advisory Group	No	Number
DG	Directorate-General	NOx	Nitrogen Oxide
EDGAR	Emission Database for Global Atmospheric Research	NTB	Non-Tariff Barrier
EE	Energy Efficiency	NTM	Non-Tariff Measure
EGS	Environmental Goods and Service	N ₂ O	Nitrous Oxide
EP	European Parliament	OECD	Organisation for Economic Cooperation and Development
EU	European Union	OHCHR	Office of the United Nations High Commissioner for Human Rights
EU ETS	EU Emissions Trading system	OPC	Open Public Consultation
EU MS	EU Member States	OR	Outermost Region
FAO	Food and Agricultural Organisation	PM	Particulate Matter
FDI	Foreign Direct Investment	PUR	Preference Utilisation Rate
FDIR	Foreign Direct Investments Restrictiveness Index	RBC	Responsible Business Conduct
FRA	EU Agency for Fundamental Rights	RCF	Regulatory Cooperation Forum
FTA	Free Trade Agreement	RES	Renewable Energy Sources
F2F	Face-to-face	RoO	Rules of Origin
GATS	General Agreement on Trade in Services	SDG	Sustainable Development Goal
GATT	General Agreement on Tariffs and Trade	SEZ	Special Economic Zone
GCC	Gulf Cooperation Council	SIA	Sustainability Impact Assessment
GDP	Gross Domestic Product	SME	Small or Medium-sized Enterprise
GHG	Greenhouse Gas	SOx	Sulphur Oxide
GI	Geographical Indication	SO ₂	Sulphur Dioxide
GMO	Genetically modified organisms	SPA	Strategic Partnership Agreement
GPA	Government Procurement Agreement	SPS	Sanitary and Phyto-Sanitary Measures
GTAP	Global Trade Analysis Project	STRI	Services Trade Restrictiveness Index
HHI	Herfindahl-Hirschman Index	TBT	Technical Barriers to Trade
HRIA	Human Rights Impact Assessment	TFI	Trade Facilitation Indicators
HS	Harmonised System		
ICERD	International Convention on Elimination of all forms of Racial Discrimination	TRIPS	Trade-Related Aspects of Intellectual Property Rights
ICESCR	International Covenant on Economic, Social and Cultural Rights	TRQ	Tariff Rate Quota
ICMW	International Convention on the Protection of the Rights of all Migrant Workers and Members of their Families	TS	Tender Specifications
ICPED	International Convention for the Protection of All Persons from Enforced Disappearance	TSD	Trade and Sustainable Development
ICRPD	International Convention on the Rights of Persons with Disabilities	UAE	United Arab Emirates
ICS	Investment Court System	UN	United Nations
ICT	Information & Communication Technology	UNCTAD	United Nations Conference on Trade and Development
ILO	International Labour Organisation	UNECE	United Nations Economic Commission for Europe
IP	Intellectual Property	UNEP	United Nations Environment Programme
IPCC	Intergovernmental Panel Climate Change	UNFCCC	United Nations Framework Convention on Climate Change
IPR	Intellectual Property Rights	UPR	Universal Periodic Review
ISDS	Investor-State Dispute Settlement	WB	World Bank
ISSG	Inter-Service Steering Group	WCMC	World Conservation Monitoring Centre
ITC	International Trade Centre	WDI	World Development Indicators
		WHO	World Health Organisation
		WITS	World Integrated Trade Solution
		WTO	World Trade Organisation

I. ANNEX I: MODELS AND METHODOLOGICAL TOOLS

The quantitative assessment of sustainability effects of the potential EU-GCC FTA/SPAs is based on two core tools: 1) the Computable General Equilibrium model; 2) gravity regression analysis. These two tools will be used in addition to statistical (data) analysis to form the core of the SIA's quantitative approach. Both methodological approaches are explained in this Annex.

I.1. Computable General Equilibrium (CGE) model

For the Computable General Equilibrium (CGE) model simulations, DG Trade has utilised the GTAP model and Version 11 of the Global Trade Analysis Project (GTAP) database, with 2017 as the base year, projected forward to 2025. GTAP is a CGE model of the world economy extending the comparative static framework of the standard GTAP model developed by Hertel (1997), while preserving the features of the standard GTAP, such as constant returns to production technology, perfectly competitive markets and product differentiation by countries of origin (the so-called 'Armington assumption'). The model features a neoclassical closure where employment is taken as given, but wages reflect the macroeconomic effect on supply and demand of labour, while sectoral employment variations indicate which sectors gain or lose.

Sectors

Version 11 of the GTAP database distinguishes 65 sectors. For the modelling, these were aggregated to 31 sectors (right column). This allows an analysis of the Agreement's effects on specific sectors where the largest trade impact is taking place. Table I.1 provides details on the sectors, as defined in the model.

Table I.1: Economic sectors as defined in the model

GTAP No	GTAP Code	Description	Sector definition study
1	pdr	Paddy Rice: rice, husked and unhusked	Other agriculture
2	wht	Wheat: wheat and meslin	Cereals
3	gro	Other Grains: maize (corn), barley, rye, oats, other cereals	Cereals
4	v_f	Veg & Fruit: vegetables, fruit and nuts, potatoes, cassava, truffles	Other agriculture
5	osd	Oil Seeds: oil seeds and oleaginous fruit; soybeans, copra	Other agriculture
6	c_b	Cane & Beet: sugar cane and sugar beet	Other agriculture
7	pfb	Plant Fibres: cotton, flax, hemp, sisal and other raw vegetable materials used in textiles	Other agriculture
8	ocr	Other Crops: live plants; cut flowers and flower buds; flower seeds and fruit seeds; vegetable seeds, beverage and spice crops, unmanufactured tobacco, cereal straw and husks, unprepared, whether or not chopped, ground, pressed or in the form of pellets; swedes, mangolds, fodder roots, hay, lucerne (alfalfa), clover, sainfoin, forage kale, lupines, vetches and similar forage products, whether or not in the form of pellets, plants and parts of plants used primarily in perfumery, in pharmacy, or for insecticidal, fungicidal or similar purposes, sugar beet seed and seeds of forage plants, other raw vegetable materials	Other agriculture
9	ctl	Cattle: cattle, sheep, goats, horses, asses, mules, and hinnies; and semen thereof	Other agrifood
10	oap	Other Animal Products: swine, poultry and other live animals; eggs, in shell (fresh or cooked), natural honey, snails (fresh or preserved) except sea snails; frogs' legs, edible products of animal origin n.e.c., hides, skins and furskins, raw, insect waxes and spermaceti	Other agrifood
11	rmk	Raw milk	Dairy
12	wol	Wool: wool, silk, and other raw animal materials used in textile	Other agriculture
13	frs	Forestry: forestry, logging and related service activities	Other agriculture

GTAP No	GTAP Code	Description	Sector definition study
14	fish	Fishing: hunting, trapping and game propagation including related service activities, fishing, fish farms; service activities to fishing	Other agriculture
15	coa	Coal: mining and agglomeration of hard coal, lignite and peat	Other manufacturing
16	oil	Oil: extraction of crude petroleum and natural gas (part), service activities incidental to oil and gas extraction excluding surveying (part)	Oil
17	gas	Gas: extraction of crude petroleum and natural gas (part), service activities incidental to oil and gas extraction excluding surveying (part)	Gas
18	oxt	Other Extraction: mining of metal ores, uranium, gems. other mining and quarrying	Mining
19	cmt	Cattle Meat: fresh or chilled meat and edible offal of cattle, sheep, goats, horses, asses, mules, and hinnies. Raw fats or grease from animal or bird.	Other agrifood
20a	omt	Other Meat: pig meat and offal. preserves and preparations of meat, meat offal or blood, flours, meals and pellets of meat, inedible meat offal; greaves	Other agrifood
20b	omt	Other Meat: pig meat and offal. preserves and preparations of meat, meat offal or blood, flours, meals and pellets of meat, inedible meat offal; greaves	Poultry
21	vol	Vegetable Oils: crude and refined oils of soya-bean, maize (corn), olive, sesame, ground-nut, olive, sunflower-seed, safflower, cotton-seed, rape, colza and canola, mustard, coconut palm, palm kernel, castor, tung joboba, babassu and linseed, perhaps partly or wholly hydrogenated, inter-esterified, re-esterified or elaidinised. Also, margarine and similar preparations, animal or vegetable waxes, fats and oils and their fractions, cotton linters, oil-cake and other solid residues resulting from the extraction of vegetable fats or oils; flours and meals of oil seeds or oleaginous fruits, except those of mustard; degreas and other residues resulting from the treatment of fatty substances or animal or vegetable waxes.	Other agrifood
22	mil	Milk: dairy products	Dairy
23	pcr	Processed Rice: rice, semi- or wholly milled	Other agrifood
24	sgr	Sugar	Other agrifood
25	ofd	Other Food: prepared and preserved fish or vegetables, fruit juices and vegetable juices, prepared and preserved fruit and nuts, all cereal flours, groats, meal and pellets of wheat, cereal groats, meal and pellets n.e.c., other cereal grain products (including corn flakes), other vegetable flours and meals, mixes and doughs for the preparation of bakers' wares, starches and starch products; sugars and sugar syrups n.e.c., preparations used in animal feeding, bakery products, cocoa, chocolate and sugar confectionery, macaroni, noodles, couscous and similar farinaceous products, food products n.e.c.	Processed food
26a	b_t	Beverages and Tobacco products	Beverages
26b	b_t	Beverages and Tobacco products	Tobacco products
27	tex	Textiles: textiles and man-made fibres	Textiles, Wearing Apparel & Leather
28	wap	Wearing Apparel: Clothing, dressing and dyeing of fur	Textiles, Wearing Apparel & Leather
29	lea	Leather: tanning and dressing of leather; luggage, handbags, saddlery, harness and footwear	Textiles, Wearing Apparel & Leather
30	lum	Lumber: wood and products of wood and cork, except furniture; articles of straw and plaiting materials	Other manufacturing
31	ppp	Paper & Paper Products: includes publishing, printing and reproduction of recorded media	Other manufacturing
32	p_c	Petroleum & Coke: coke oven products, refined petroleum products, processing of nuclear fuel	Petroleum & coke
33	chm	Chemical products: basic chemicals, other chemical products	Chemicals
34	crp	Basic pharmaceutical products	Pharmaceuticals
35	rpp	Rubber and plastics products	Rubber & plastics

GTAP No	GTAP Code	Description	Sector definition study
36	nmm	Non-Metallic Minerals: cement, plaster, lime, gravel, concrete	Non-metallic minerals
37	i_s	Iron & Steel: basic production and casting	Iron & steel
38a	nfm	Non-Ferrous Metals: production and casting of copper, aluminium, zinc, lead, gold, and silver	Other non-ferrous metals
38b	nfm	Non-Ferrous Metals: production and casting of copper, aluminium, zinc, lead, gold, and silver	Aluminium
39	fmp	Fabricated Metal Products: Sheet metal products, but not machinery and equipment	Other manufacturing
40	ele	Electronic Equipment: office, accounting and computing machinery, radio, television and communication equipment and apparatus	Electrical and electronic goods
41	eeg	Electrical equipment: electrical machinery and apparatus n.e.c.,	Electrical and electronic goods
42	ome	Other Machinery & Equipment: medical, precision and optical instruments, watches and clocks	Machinery
43	mvh	Motor vehicles and parts: cars, lorries, trailers and semi-trailers	Motor vehicles
44	otn	Other Transport Equipment: Manufacture of other transport equipment	Transport equipment
45	omf	Other Manufacturing: includes recycling	Other manufacturing
46	ely	Electricity: production, collection and distribution	Other services
47	gdt	Gas Distribution: distribution of gaseous fuels through mains; steam and hot water supply	Other services
48	wtr	Water: collection, purification and distribution	Other services
49	cns	Construction: building houses factories offices and roads	Other services
50	trd	Trade: all retail sales; wholesale trade and commission trade	Trade and distribution
51	afs	Hotels and restaurants; repairs of motor vehicles and personal and household goods; retail sale of automotive fuel	Other services
52	otp	Other Transport: road, rail; pipelines, auxiliary transport activities; travel agencies	Other services
53	wtp	Water transport	Water transport services
54	atp	Air transport	Air transport services
55	whs	Warehousing and support activities	Trade and distribution
56	cmn	Communications: post and telecommunications	Other services
57	ofi	Other Financial Intermediation: includes auxiliary activities but not insurance and pension funding (see next)	Other services
58	ins	Insurance: includes pension funding, not compulsory social security	Other services
59	rsa	Real estate activities, renting	Other services
60	obs	Business Services n.e.c.	Business Services
61	ros	Recreation & Other Services: recreational, cultural and sporting activities, other service activities; private households with employed persons (servants)	Other services
62	osg	Other Services (Government): public administration and defence; compulsory social security, health and social work, sewage and refuse disposal, sanitation and similar activities, activities of membership organizations n.e.c., extra-territorial organizations	Government services
63	edu	Education	Other services
64	hht	Human health and social work activities	Other services
65	dwe	Dwellings: ownership of dwellings (imputed rents of houses)	Other services

Source: Prepared by the authors based on information provided by the European Commission

Regions

The model aggregates the 141 GTAP regions into 21 regions, as outlined in Table I.2. The level of aggregation is higher than for sectors, but it is inevitable to keep the model

manageable, given the low sector aggregation. The EU, the GCC region and individual GCC members (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and UAE), UK, Türkiye, US, Japan, China, South Korea, Rest of Asia, India, Russia Wider Middle East, Rest of High-Income countries, LDCs, and Rest of World (to close the model) are modelled. Türkiye is modelled separately to examine the effect of the EU-GCC FTA/SPAs on the EU-Türkiye Customs Union, the Wider Middle East is split out to look at how the Agreements impact other countries in the Middle East, and LDCs are split out, allowing the assessment of the Agreement's impact on the poorest countries in the world.

Table I.2: Regions as defined in the CGE model

Region no.	Region name
1	EU27
2a	GCC region (aggregate)
2b1	Bahrain
2b2	Kuwait
2b3	Oman
2b4	Qatar
2b5	Saudi Arabia
2b6	United Arab Emirates
3	UK
4	Türkiye
5	US
6	Japan
7	China
8	South Korea
9	Rest of Asia
10	India
11	Russia
12	Wider Middle East (rest of Middle East)
13	Rest of High-Income Countries
14	LDCs
15	Rest of World (ROW)

Source: Prepared by the authors based on information provided by the European Commission

Baseline

The baseline consists of the modelling of the EU-UAE FTA, the EU-GCC member country SPAs and a region-to-region EU-GCC FTA.

- The baseline incorporates all EU FTAs applied up to 2025 (so India is not yet included). Accordingly, the tariff and NTM changes brought about by these prior Agreements are included in the baseline tariffs considered for the simulations and remain unchanged in the experiment.
- The UK's withdrawal from the EU and sanctions against Russia (following its invasion in Ukraine) are included in the baseline.

Policy scenario

The policy scenario simulates the conclusion of an FTA with the UAE and six Strategic Partnership Agreements (SPAs) with all GCC countries. Also, a policy scenario simulates the conclusion of an FTA region-to-region. Therefore, it is assumed that related tariffs and NTMs, both bilaterally and region-to-region are specified in detail for the selected sectors.

I.2. Structural gravity model used for investment analysis

As described in section **Error! Reference source not found.** and section **Error! Reference source not found.** of this Inception Report, estimating the effect of preferential investment liberalisation in the EU-GCC FTA/SPAs on their bilateral investments will be done by using a structural gravity model with the most recent data

on bilateral FDI from UNCTAD. This is an established and scientifically validated approach that has been described in detail below.

The proposed methodology would examine the investment effect at both the extensive (incidence or occurrence) and intensive (value) margins using the two-step Heckman (1979) estimation, leading to the following estimating equations:

Selection equation

$$(1) \quad \Pr(\text{FDI}_{ijt} > 0) = \beta_0 + \beta_1 \text{BIT}_{ijt} + \beta_2 \text{PTA}_{ijt} + \beta_3 \text{GPA}_{ijt} + \beta_4 \text{EV}_{ijt} + \lambda_{it} + \lambda_{jt} + \lambda_{ij} + \mu_{ijt}$$

Outcome equation

$$(2) \quad \ln(\text{FDI}_{ijt} / \text{FDI}_{ijt} > 0) = \beta_0 + \beta_1 \text{BIT}_{ijt} + \beta_2 \text{PTA}_{ijt} + \beta_3 \text{GPA}_{ijt} + \eta_{ijt} + z_{ijt} + \lambda_{it} + \lambda_{jt} + \lambda_{ij} + \mu_{ijt}$$

where the dependent variable in equation (1) is a binary dummy indicating the presence of bilateral FDI from country i to country j at time t , and the dependent variable in equation (2) is the log of FDI stock and flows in distinct equations.

Amongst explanatory variables, BIT_{ijt} is a binary dummy indicating membership of a bilateral investment treaty between the two countries; PTA_{ijt} is a binary dummy indicating membership of trade agreements with provisions on investment; GPA_{ijt} is a binary dummy indicating membership of the WTO's Agreement on Government Procurement; EV_{ijt} is the exclusion variable in the selection equation; η_{ijt} is the inverse mill's ratio to control for the sample selection bias and the cube polynomial of z_{ijt} is used to control for firm heterogeneity biases in the outcome equation. μ_{ijt} is the error term.

Both equations include three-way fixed effects (λ_{it} , λ_{jt} , λ_{ij}) to account for multilateral resistance (for instance see Anderson and Yotov, 2012) as well as endogeneity-related concerns (for instance see Baier and Bergstrand, 2007; Baier et al. 2014) in estimation.

The results from this analysis will yield the average investment-creating effect of a bilateral trade and investment agreement which will inform us on the potential for increased foreign direct investment emanating from an FTA/SPAs between the EU and GCC countries.

1.3. Structural gravity model used for public procurement

As described in section **Error! Reference source not found.** and section **Error! Reference source not found.** of the main Report, estimating the effect of preferential procurement liberalisation in the EU-GCC FTA/SPAs on their bilateral procurement relations will be done by using a structural gravity model with data on public imports from the World Input Output Database (WIOD; Timmer et al., 2015) over 2000-2014. The proposed methodology, which is established and peer-reviewed, would examine the procurement effect at both the extensive (incidence or occurrence) and intensive (value) margins using the two-step Heckman (1979) estimation, leading to the following estimating equations:

Selection equation

$$(1) \quad \Pr(\text{Proc}_{ijkt} > 0) = \beta_0 + \beta_1 \text{GPA}_{ijkt} + \beta_2 \text{PTA}_{ijkt} + \beta_3 \text{EV}_{ijkt} + \lambda_{ikt} + \lambda_{jkt} + \lambda_{ij} + \mu_{ijkt}$$

Outcome equation

$$(2) \quad \ln(\text{Proc}_{ijkt} / \text{Proc}_{ijkt} > 0) = \beta_0 + \beta_1 \text{GPA}_{ijkt} + \beta_2 \text{PTA}_{ijkt} + \eta_{ijkt} + z_{ijkt} + \lambda_{ikt} + \lambda_{jkt} + \lambda_{ij} + \mu_{ijkt}$$

where the dependent variable in equation (1) is a binary dummy indicating bilateral procurement in sector k from country i to country j at time t , and the dependent variable in equation (2) is the log of procurement value.

Amongst explanatory variables, GPA_{ijt} is a binary dummy indicating membership of the GPA; PTA_{ijt} is a binary dummy indicating membership of trade agreements with provisions on government procurement; EV_{ijkt} is the exclusion variable in the selection equation; η_{ijkt} is the inverse mill's ratio to control for the sample selection bias and the cube polynomial of z_{ijkt} is used to control for firm heterogeneity biases in the outcome equation. μ_{ijkt} is the error term.

Both equations include three-way fixed effects (λ_{ikt} , λ_{jkt} , λ_{ij}) to account for multilateral resistance (for instance see Anderson & Yotov, 2012) as well as endogeneity-related concerns (for instance see Baier & Bergstrand, 2007; Baier et al. 2014) in estimation.

The results from this analysis will yield the average effect on procurement of a bilateral trade agreement which will inform us on the potential for increased public procurement emanating from an FTA/SPAs between the EU and GCC countries.

ANNEX II: MAIN INDICATORS & INFORMATION SOURCES

In this Annex, the main indicators are presented per sustainability pillar: economic, social, environmental, and human rights. These indicators and indicator data will be used for the quantitative parts of the analysis of this SIA.

II.1. Economic and investment indicators and information sources

Table II.1: Economic and investment indicators

Economic and investment indicators	
The analysis will draw on the following indicators, subject to data availability. The list is not exhaustive, and additional indicators may be incorporated where relevant. Where possible, data will be disaggregated by categories pertinent to the study (e.g. by country, sector, or thematic issue).	
<p>Evolution of trade in goods and services</p> <ul style="list-style-type: none"> • Bilateral EU-GCC trade in goods (€ mln) • Bilateral EU-GCC trade in services (€ mln) • Total EU trade in goods and services (€ mln) • Total GCC trade in goods/services (€ mln) • Growth in EU-GCC trade in goods and services over time (% , € mln) • Trends in EU-GCC product-level trade over time (% , € mln) • Trends in EU-GCC sectoral level services trade over time) (% , € mln) 	<p>Tariff and NTM obstacles to EU-GCC trade</p> <ul style="list-style-type: none"> • GCC tariffs on imports from the EU (MFN, Applied) – overall and at product level • GCC tariffs on imports from third countries (MFN, Applied) – overall and at product level • EU tariffs on imports from GCC (MFN, Applied) – overall and at product level • EU tariffs on imports from third countries – overall and at product level • Amounts of bilateral trade impacted by the different tariff lines at overall and product level • Amounts of bilateral trade impacted by the existence of NTMs.
<p>Overall and sectoral impact analysis</p> <ul style="list-style-type: none"> • Overall effect on welfare in EU/GCC • Overall effect on exports and imports and the trade (and services) balance in EU/GCC • Overall effects on prices in EU/GCC • Overall effect on fiscal revenues (revenues foregone) in EU/GCC • Overall effect on global value chains and value chain integration in EU/GCC • Overall effect on real wages in EU/GCC and returns to other factors (e.g. land) • Overall effect on CO2 emissions in EU/GCC • Overall effect on poverty • Sectoral effects on output in EU/GCC • Sectoral effects on employment EU/GCC • Sectoral effects on total trade EU/GCC • Sectoral effects on bilateral trade EU/GCC • Sectoral effects on CO2 emissions EU/GCC 	<p>Investments and investment conditions</p> <ul style="list-style-type: none"> • FDI statistics (EU and GCC) • Bilateral EU-GCC investments (in € mln) • EU investment conditions • EU investment agreement templates • GCC investment conditions • GCC investment agreement templates • Bilateral investment treaty elements and evolution • Ease of Doing Business in EU and GCC <p>Government procurement issues</p> <ul style="list-style-type: none"> • Access to government procurement in GCC for EU actors and vice versa • Government procurement policy in GCC • Government procurement policy in EU • Access to government procurement in the EU for GCC actors • Government procurement policy in the EU
<p>Small- and Medium Sized Enterprises</p> <ul style="list-style-type: none"> • Number of SMEs and their contributions to the economy (GDP, employment, exports) • Participation of SMEs in international trade • Barriers to internationalisation/exports for SMEs • Sensitivity of SMEs to external events (e.g. COVID-19 pandemic) • Degree of legal uncertainty for SMEs • SME-Test • Competitiveness of SMEs 	<p>Other issues</p> <ul style="list-style-type: none"> • EU and GCC practices on Rules of Origin • EU and GCC customs issues • WTO Trade Facilitation Agreement • Strength and quality of EU IP system • Strength and quality of GCC IP systems

Source: own compilation

Table II.2: Economic and investment information sources

Economic and investment information sources	
The list of information and data sources to be used for the economic impact analysis and related cross-cutting topics (including economic aspects concerning SMEs and LDCs) presented below is not exhaustive. Additional sources may be identified and incorporated during the course of the project.	
Evolution of trade in goods and services <ul style="list-style-type: none"> • Eurostat (2024/2025) import and export data • UN Comtrade (2024) time series, overall and HS6 product level data of imports and exports • OECD Statistics (2022/2023) for services trade data • GTAP10/GTAP11 for sectoral services data • From Europe to the world: understanding challenges for European businesswomen (EC, ITC) 	Tariff and NTM obstacles to EU-GCC trade <ul style="list-style-type: none"> • EU Access2Markets database • UNCTAD Trains database • World Integrated Trade Solution (WITS) • GTAP 10/11 database • Berden et al. (2009) NTM database • WTO TPRB Reports for GCC and the EU • WTOs e-Ping and I-TIP portals • USTR National Trade Estimate reports • USTR Special 301 reports • OECD Restrictiveness indicators • OECD Services trade restrictiveness indicators • OECD Trade Facilitation Index • Cross-country data on trade costs by UNESCAP and World Bank
Overall and sectoral impact analysis <ul style="list-style-type: none"> • GTAP 10/11 data on welfare, exports, imports, prices, fiscal revenues, GVC, wages, CO2 emissions, poverty, output, employment sectoral exports, imports, services data • Eurostat (2024/2025) import and export data • UN Comtrade (2023/2024) time series, overall and HS6 product level data of imports and exports • World Input Output Database (WIOD) (discontinued) • OECD Statistics (2023/2024) for services trade data Government procurement <ul style="list-style-type: none"> • World Input Output Database (WIOD) (discontinued) • World Economic Forum's Global Competitiveness Report 	Investments and investment conditions <ul style="list-style-type: none"> • International Growth Centre research • UNCTAD Bilateral Investment Treaties 1959 – 1999 • UNCTAD bilateral FDI statistics • World Bank 'Doing Business Indicators' • World Economic Forum's Global Competitiveness Report • Cross-country data on trade costs by UNESCAP and World Bank • OECD FDI Restrictiveness Index • GATS Trade Restrictiveness Index
Small- and Medium Sized Enterprises <ul style="list-style-type: none"> • Eurobarometer SME survey (2015) • Eurobarometer SME survey (2022) • EU User Guide to SME definition • Menezes et al. (2020) "Under Pressure: Integrating Online Dispute Resolution Platforms into Pre-insolvency Processes and Early Warning Tools to Save Distressed Small Businesses" 	Customs issues <ul style="list-style-type: none"> • EU Rules of Origin regime • GCC Rules of Origin regime • WTO Trade Facilitation Agreement • World Bank data on customs and border barriers

Source: own compilation

II.2. Social indicators and information sources

Table II.3: Social indicators

Social indicators	
In the social analysis, including the social dimensions of cross-cutting thematic areas, the following indicators will be used, subject to data availability. The list is not exhaustive, and additional indicators may be incorporated where relevant. Where possible, data will be disaggregated by categories pertinent to the study (e.g. by gender, education level, age group, sector, or other relevant classifications).	
Employment and women's empowerment	<ul style="list-style-type: none"> • Inactivity rate (in %)

Social indicators	
<ul style="list-style-type: none"> Labour force participation rate (in %) Employment rate (in %) Sectoral employment shares in total employment (in % and as an absolute number of workers) Unemployment rate (in %) 	<ul style="list-style-type: none"> The above indicators for women compared with the same indicators for men (in %) Sectoral shares of women-led businesses (as % of all women-led businesses) Sectoral shares of women-led companies in international trade (in % of the total)
<p>Income, poverty, inequality and consumers</p> <ul style="list-style-type: none"> Total poverty rate (in %) Poverty rates (in %) among chosen groups of population (e.g. families with children) Persons at risk of poverty and social exclusion (share in % of the population) Working poor/in-work poverty (in %) Income inequality/gender-based wage gap 	<ul style="list-style-type: none"> Minimum wage levels Shares of low-wage earners among workers in a given sector Wage gaps between different groups of workers, e.g. local and migrant workers The number and type of unsafe products originating in GCC countries identified by the EU RAPEX and RASFF systems
<p>Job quality/working conditions</p> <ul style="list-style-type: none"> Contract: (% of workers having a permanent, temporary, or casual contract, being self-employed, working full-time, or part-time) Wage levels by sector (monthly or annually) Working hours (per person per week) in the entire economy and by sector Social security coverage (% of workers) 	<ul style="list-style-type: none"> Type, number, and duration of training provided or paid by employer The rate (and absolute numbers) of fatal and non-fatal accidents at work by sector The number of labour inspectors The number of labour inspections at workplaces
<p>Labour standards</p> <ul style="list-style-type: none"> Labour activity rate (in %), employment rate (in %) and unemployment rate (in %) in vulnerable groups of workers (e.g. youth, older workers, persons with disabilities or migrant workers) Trade union density (share of trade union members in the total of workers, in %) The share of workforce covered by collective bargaining agreements (in %) The number of cases of human trafficking 	<ul style="list-style-type: none"> The number of investigations/convictions in cases of human trafficking (or the % share of convictions in the total number of cases) The number of persons in forced labour/modern slavery conditions Poverty rate (in %) among children or families with children (if identified) Cases of child labour The number of ratified ILO fundamental and priority Conventions
<p>Public policies (education and healthcare)</p> <ul style="list-style-type: none"> The equivalent of the % of the expenditures lost due to the loss of tariff revenues 	<ul style="list-style-type: none"> Public expenditures for education/healthcare as a % of the (national) budget spending and as % of GDP

Source: own compilation

Table II.4: Social information sources

Social information and data sources	
<p>The list of information and data sources to be used in the social impact analysis presented below is not exhaustive. A more comprehensive list of references identified to date is provided in the References section. Additional sources may be identified and incorporated as the analysis progresses during project implementation.</p>	
<p>Employment and women's empowerment</p> <ul style="list-style-type: none"> EU Joint Employment Reports (annual) Employment and social developments in Europe (yearly editions) EU Labour Force Survey (Eurostat) Union of skills (EC, 2025) OECD, 2023. Employment Outlook 2023. Artificial Intelligence and jobs. Employment and value added in EU exports – an analysis with FIGARO data (Eurostat) 	<ul style="list-style-type: none"> Mastercard Index of Women Entrepreneurs Trade and Gender Toolbox, UNCTAD, 2017 Labour participation (Gulf Labour Markets, Migration and Population Programme) Country profiles developed by the ILOSTAT Saudi Labour Market Update (Jadwa Investment, 2025)

Social information and data sources	
<ul style="list-style-type: none"> Gender pay gap statistics (Eurostat, 2025) EU Gender equality strategy (2020-2025) and annual reports on gender equality in EU Parliament approves first-ever EU rules on combating violence against women (European Parliament, 2024) European Parliament (2023). Equal pay for equal work between men and women: Pay transparency and enforcement mechanisms. From Europe to the world: understanding challenges for European businesswomen (EC, ITC, 2019) Women's Entrepreneurship (GEM, 2013; 2019; 2024) WEbarometer 2021. A Survey of Women Entrepreneurs in Europe Eurochambres Women Network 2023 Survey: A picture of female entrepreneurship 	<ul style="list-style-type: none"> Towards a national jobs strategy in Kuwait (Ajwad et al, 2022), Decent Work Country Programme for Kuwait (ILO, 2018), Labour market dynamics in Oman (Tabti, Troug, 2025), Qatarisation: playing the long game on workforce nationalisation (Kabbani, 2025) A comprehensive labour market analysis across UAE (Zehra, 2025) Exploring Saudi Arabia's SEZs (TMF Group, 2024) UAE SEZs. Investor guide (UAE-India CEPA Council, 2024) Where to set up in Qatar: SEZs and industrial areas (HSBC, 2024) Kuwait Economic Zones (KDIPA, no date) Free Trade and SEZs in Oman (Al Khonji, 2024) Bahrain Free Trade Zones (Tetra Consultants, no date).
<p>Income, poverty, inequality, and consumers</p> <ul style="list-style-type: none"> ILOSTAT Country profiles EU Joint Employment Reports (annual) Living conditions in Europe - poverty and social exclusion 2024 (Eurostat, 2025) People at risk of poverty or social exclusion in 2024 (Eurostat, 2025) Disability statistics - poverty and income inequalities (Eurostat, 2024) Migrant integration statistics, at risk of poverty & social exclusion (Eurostat, 2024) Minimum wage statistics (Eurostat, 2025) European Child Guarantee Recommendation related to energy poverty New EU Consumer Agenda (EC, 2020) 	<ul style="list-style-type: none"> Consumer benefits from EU trade liberalisation: How much did we save since the Uruguay Round? (Cernat et al, 2018) Data from EU RAPEX (Safety Gate) and RASFF systems BEUC 2018 and 2022 positions on aspects important for consumers in FTAs E-commerce Communication (European Commission, 2025) Poverty in GCC countries 2010-2021 (ESCWA, 2023) Consumer protection law. The Arab business legislative frameworks (ESCWA, 2023) Industry Ministry launches GCC Consumer Protection Week (Bahrain News Agency)
<p>Job quality / working conditions</p> <ul style="list-style-type: none"> Eurostat Labour Force Survey Joint Employment Report (annual editions) Temporary and permanent employment – statistics (Eurostat, 2024d) Employment and social developments in Europe (annual editions) 	<ul style="list-style-type: none"> Part-time work statistics (Eurostat, 2024) Hours of work statistics (Eurostat, 2025) Accidents at work statistics (Eurostat, 2024) Minimum wage statistics (Eurostat, 2025d) EU social benefits expenditure (Eurostat, 2024g) ILOSTAT country profiles
<p>Labour standards</p> <ol style="list-style-type: none"> Reports of the ILO monitoring bodies EU Joint Employment Reports (annual) EU Labour Force Survey (Eurostat) EU Strategy for the Rights of Persons with Disabilities 2021-2030 Progress Report on the implementation of the European Disability Strategy 2010-2020 Disability statistics - poverty and income inequalities (Eurostat, 2024) Disability Employment Package (2022) Recommendation on the Youth Guarantee 	<ol style="list-style-type: none"> EU strategy on the rights of the child Commission Staff Working Document, Trade and Worst Forms of Child Labour World Migration Report 2024 (IOM, 2024) Migrant workers in GCC countries. Statistics (IOM, 2023) IOM strategy for the Gulf countries (2021-2024) (IOM, 2021) Changing work and workers' health un the 21st century, a view from Kuwait (Vainio, 2019) International Migrant Stock, UN DESA, 2024

Social information and data sources	
9. European Commission Communication: Strengthening social dialogue in the EU: harnessing its full potential for managing fair transitions 10. Recommendation on strengthening social dialogue in the EU (EU Council, 2023) 11. European Parliament resolution of 1 June 2023 on strengthening social dialogue (European Parliament, 2023) 12. ETUC (2022). Red card for EU countries over failure to support for workplace safety as fundamental right 13. EU Strategic Framework on Health and Safety at Work (2014-2020 and 2021-2027) 14. EU Corporate Sustainability Due Diligence Directive 15. EU Forced Labour Regulation 16. EU Strategies towards the Eradication of Trafficking in Human Beings 2012-2016 and 2021-2025 17. Reports on the progress made in the EU in combating trafficking in human beings 18. European Child Guarantee 19. EU Guidelines for the Promotion and Protection of the Rights of the Child	27. How the GCC is giving young people a central role in their future (WEF, 2025) 28. What is the Nature of the Employment Challenge in the GCC Countries? (Mina, 2024) 29. GCC countries' reports on non-ratified ILO fundamental Conventions 30. Trade unions take Saudi Arabia to UN labour body over exploitation and deaths of migrant workers (ITUC, 2025) 31. Qatar's Labour Laws set Foundation for a World Cup with Workers' Rights, ITUC, 2022 32. Towards a New Oman Decent Work Country Programme (ILO, 2023) 33. Modern slavery in Saudi Arabia and main findings (Walk Free, 2021) 34. Saudi Arabia becomes first Arab country to launch National Policy on forced labour and worker rights (Walk Free, 2025) 35. Child labour in Oman. Findings of the US Department of Labor (USDOL, 2023) 36. Child labour prevalent among low-income families in Oman (Times of Oman, 2016)
Public policies (healthcare and education) <ul style="list-style-type: none"> Healthcare expenditure statistics (Eurostat, 2024) Government expenditure on education (Eurostat, 2025) WHO Global Health Expenditure Database 	<ul style="list-style-type: none"> Healthcare systems and health economics in GCC countries (Al-Ruthia et al, 2025) UNDP, 2024, Costing of Primary Healthcare Arrangements in six GCC Countries Education in the GCC: Developments and Trends (Mosly, 2022)

Source: own compilation

II.3. Environmental indicators and information sources

Table II.5: Environmental indicators and information sources

Impact area	Sub area	Indicator	Example of data sources
Climate Change	Greenhouse gas emissions and LULUCF	GHG emission level & intensity, (negative) GHG emissions (Mt of CO _{2eq} (by sector and total)	UNFCCC reporting (incl. National Communications, Biennial Update Reports, Nationally Determined Contributions and Biennial Transparency Reports, national reports and statistics)
		Net Zero target (year) and distance to target (classification)	UNFCCC reporting, National reports, Climate Action Tracker
	Energy production and GHG emissions	% fossil fuels and renewables, GHG emission intensity of electricity generation (g CO ₂ / Kwh)	National statistics
	Adaptation & adaptation capacity	Economic losses from climate related extremes	UNFCCC reporting, national reports, Insurance companies (e.g. Swiss RE)
Increased climate resilience of key economic sectors (risk and vulnerability indicators)		UNFCCC reporting (incl. National Adaptation Plan and Adaptation Gap Report), national reports and statistics	

Impact area	Sub area	Indicator	Example of data sources
	Climate Finance	Contribution to Climate finance (EUR/USD, public and private)	National reports, OECD Climate Finance reports
Biodiversity (incl. natural resources)	Forestry	Deforestation rate	WB / WDI / FAO UNEP-WCMC/ IUCN
		% forestland and % protected,	WB / WDI / FAO, UN biodiversity map / WDPA / national statistics
		trade in timber under CITES, % of illegal sold wood	Biennial national CITES Reports, Interviews/scientific literature
	Mining	Production of mining (raw minerals), mining export	World mining database
	Fisheries	Fish (commercial) stock	ICES ¹ / STECF ² / http://www.seaaroundus.org/national-statistics/Fishbase.in
		# of protected marine area	http://www.mpatlas.org
	Soil quality	Soil erosion	European Soil Data centre/ FAO
		Soil contamination	ESDAC / ICCL reports ³
		Consumption of fertilizers	FAO database
		Mercury emissions	AMAP reports / UNEP reports
	Biodiversity	# of (threatened) species	GBFI/ WB/IUCN Red List of Threatened species
		Cropping patterns/livestock patterns	FAO database
		Rate of deforestation/land use change	WDI/ UNEP-WCMC/ IUCN
		Drought impact on ecosystems	National reports
		Livestock genetic diversity/GMO use	National reports
		Land use change	FAO database/national statistics
		Use of pesticides & fertilizers	UNEP / FAO database
		%/Ha of protected areas	National statistics
		FDI flows to agriculture, mining, forestry	FAO database
Wildlife		(Illegal) Trade of wildlife (frogs, sharks orchids)	CITES annual illegal trade reports (since 2016) CITES database
Air quality	PM concentration	Levels of PM2.5 and PM10 ($\mu\text{g}/\text{m}^3$)	WHO, WB, UNEP, Edgar, IQaur, national statistics
	Acidifying gases	Levels of SO _x , NO _x and NH ₃ emissions	WHO, WB, UNEP, Edgar, national statistics, Knoema world data atlas
	Ozone precursor gases	Levels of CO, CH ₄ , NMVOCs and NO _x emissions	WHO, WB, UNEP, Edgar, national statistics, Knoema world data atlas
Water quality and resources	Water quality	Fresh water quality, # of industries that comply with mining discharges	UNEP/SDG monitoring
		Water quality – pesticide pollution	National reports/OECD reports

¹ Status of fish stocks in the International Council for the Exploration of the Sea

² Technical and Economic Committee for Fisheries

³ International Committee on Contaminated Land

Impact area	Sub area	Indicator	Example of data sources
		Water quality – Nitrate pollution	National reports/OECD reports
	Water use	Water scarcity - Water Exploitation Index	Water.org/UNOPS reports/national statistics, FAO, UNEP databases
Waste and waste management	Waste generation	% of waste that end in landfills , national recycling rate (%)	WB, OECD, Eurostat, EEA, National statistics / waste.ccacoalition.org, scientific literature and national reports,
		Generation of waste by waste category, hazardousness and NACE Rev. 2 activity (kg and kg/cap or % split)	Reports to Basel, Stockholm and Rotterdam convention, National reports, SDG monitoring database
	Mgt of waste	Waste management	National reports
		% waste incineration and recycling rate (per type of waste if available)	National statistics
	Management of chemicals (including plastics)	Consumption of chemicals by hazardousness	FAO database/Nationals reports
		Imported fertilizers (nitrate, phosphorus and urea)	UNEP reports, UN COMTRADE database

Source: own compilation

II.4. Human Rights indicators and information sources

Table II.6: Human rights indicators

Human rights indicators
<p>The analysis will draw on the following indicators, subject to data availability. The list is indicative and may vary across different stages of the assessment. For selected human rights subject to focused analysis, more detailed and right-specific data will be applied. For other stages of the assessment, broader indicators will be used. The indicators are based on the recognised OHCHR (2012) structure–process–outcome framework.</p> <ul style="list-style-type: none"> ▪ Status of ratification of human rights treaties ▪ Acceptance of nine individual complaints procedures ▪ Reporting compliance by State parties to the human rights treaty bodies ▪ Standing invitations for country visits to the Special Procedures ▪ Accreditation of National Human Rights Institutions ▪ Social Progress Index (Social Progress Imperative) ▪ Freedom House Civil Liberties Index ▪ Freedom House Political Rights Index ▪ UNDP Human Development Index ▪ World Economic Forum Global Gender Gap Index ▪ World Justice Project Rule of Law Index ▪ World Bank Worldwide Governance Indicators ▪ Reporters Without Borders World Press Freedom Index ▪ OECD Social Institutions and Gender Index ▪ EIGE Gender Equality Index ▪ CIRI Human Rights Dataset ▪ Varieties of Democracy indices ▪ Transparency International Corruption Perceptions Index ▪ Global Slavery Index (Walk Free Foundation) ▪ ILO Labour rights indicators for various vulnerable groups (persons with disabilities, migrant workers, women, etc) ▪ Occupational Safety and Health Indicators (ILO, WHO) ▪ UN SDG indicators ▪ UNDP Gender Inequality Index ▪ OECD Social Institutions and Gender Index ▪ Migrant workers' rights indicators (ILO ILOSTAT, IOM data)

Human rights indicators

- Global Database on Anti-Trafficking Laws (UNODC)
- Minority Rights Group indicators
- Migrants as % of workforce
- Anti-trafficking units/ shelters/ capacity

Source: own compilation

Table II.7: Human rights information sources**Human rights information sources**

The list of information and data sources to be used in the human rights impact assessment presented below is not exhaustive, particularly with regard to specific human and labour rights issues. As the project progresses, the list will be refined and expanded to include additional sources relevant to the specific rights selected for detailed analysis.

International and UN system sources

- Reports of the UN treaty monitoring bodies (Concluding Observations, Lists of Issues)
- Reports of the UN High Commissioner for Human Rights
- UN Universal Periodic Review reports and mid-term implementation assessments
- Contributions of civil society stakeholders and NHRIs to the Universal Periodic Review
- Reports and communications of UN Special Rapporteurs and Working Groups
- Reports and databases of the International Labour Organization (ILO), including NORMLEX and ILOSTAT
- Reports of the UN Special Procedures on business and human rights, freedom of association, freedom of expression, right to health, migrants, and others
- UNDP Human Development Reports and Gender Inequality Index
- UN Women reports on gender equality and women's empowerment

EU sources

- EU Annual Reports on Human Rights and Democracy on GCC states
- EU Action Plan on Human Rights and Democracy 2020-2024
- Better Regulation Toolbox
- European Parliament resolutions and briefings on human rights situations in GCC countries
- EEAS country reports and summaries of EU-GCC Human Rights Dialogues
- European Institute for Gender Equality (EIGE) reports and indices
- EU Gender Equality Strategy 2020-2025
- EU Strategy on the Rights of Persons with Disabilities 2021-2030
- LGBTIQ Equality Strategy 2020-2025
- EU Strategy on Combatting Trafficking in Human Beings 2021-2025
- EU Strategy on the Rights of the Child
- Digital Services Act 2024

International NGOs and independent monitoring organisations

- Human Rights Watch annual reports and country reports
- Amnesty International annual reports and thematic studies
- International Federation for Human Rights (FIDH) country reports
- International Trade Union Confederation (ITUC) Global Rights Index
- CIVICUS Monitor
- Transparency International reports
- Global Witness reports

Regional and national sources

- Arab Charter on Human Rights reports and Arab Human Rights Committee reports and publications
- Reports of national human rights institutions in GCC countries, including accreditation reports from GANHRI
- Reports and data from local human rights organisations and research institutes in GCC countries (e.g. Bahrain Human Rights Watch Society, Kuwait Society for Human Rights, Omani Women's Association network, National Society for Human Rights in Saudi Arabia, Emirates Human Rights Association and others)
- Official government reports submitted to UN and ILO monitoring bodies

On women's rights and gender equality:

- Annual reports of the World Economic Forum, Global Gender Gap Index
- UNCTAD Trade and Gender Toolbox
- ITC "Mainstreaming Gender in FTAs" toolkit

Human rights information sources

- OECD "Trade and Gender. A framework for analysis"
- UN Women country reports and thematic publications
- Academic literature on gender and trade (e.g. Journal of Human Rights Practice, World Development)
- The Commission's Gender Equality Strategy 2020-2025

On RBC/CSR:

- UN Guiding Principles on Business and Human Rights (UNGPs) and reports of the UN Working Group on Business and Human Rights
- OECD Guidelines for Multinational Enterprises and OECD Due Diligence Guidance for Responsible Business Conduct
- EU documents on CSR/RBC, and due diligence
- Global Reporting Initiative (GRI) standards on human rights, labour and environment
- Reports of the International Finance Corporation (IFC) on labour and environment safeguards in investment projects
- EU Strategy for Responsible Business Conduct 2022-2027
- Commission Staff Working Document. Corporate Social Responsibility, Responsible Business Conduct, and Business & Human Rights. Overview of Progress
- EU contribution to the upcoming thematic report on the 10th anniversary of the UN Guiding Principles on Business and Human Rights (EC)
- Just and sustainable economy: Commission lays down rules for companies to respect human rights and environment in global value chains (EC)

Other cross-cutting sources

- World Bank Worldwide Governance Indicators (rule of law, regulatory quality, voice and accountability)
- Freedom House "Freedom in the World" reports
- International IDEA – Global State of Democracy Indices
- WHO health statistics
- FAO food security indicators

Source: own compilation

ANNEX III: STAKEHOLDER LISTS FOR EU AND GCC**III.1 List of EU stakeholders**

EU	Stakeholder name (+ abbreviation)	Type of stakeholder
(1)	(2)	(3)
EU	ACT Alliance Advocacy to the European Union	Private sector
EU	Active Pharmaceutical Ingredients Committee	Private sector
EU	Advantage Austria (Trade Promotion Organisation of the Austrian Federal Economic Chamber)	Private sector
EU	AEGIS	Private sector
EU	AeroSpace and Defence Industries Association of Europe	Private sector
EU	AETMD - Association Européenne des transformateurs de maïs doux	Private sector
EU	Agriculture and Horticulture Development Board (AHDB)	Private sector
EU	Airlines for Europe	Private sector
EU	Airports Council International Europe	Private sector
EU	All-Poland Alliance of Trade Unions (Ogólnopolskie Porozumienie Związków Zawodowych, OPZZ)	Trade union
EU	Amnesty International - EU Institutions Office	Civil society
EU	APRODEV (ACT Alliance EU since 2015)	Private sector
EU	Architects' Council of Europe (ACE)	Private sector
EU	ASINCA	Private sector
EU	Asociación Española de Mayoristas, Transformadores, Importadores y Exportadores de Productos de la Pesca y la Acuicultura	Private sector
EU	Assifonte	Private sector
EU	Assocalzaturifici - Italian Footwear Manufacturers' Association	Private sector
EU	Association de l'Aviculture, de l'Industrie et du Commerce de Volailles dans les Pays de l'Union Européenne asbl	Private sector
EU	Association de producteurs de cinéma et de télévision (EUROCINEMA)	Private sector
EU	Association des Constructeurs Européens d'Automobiles (ACEA)	Private sector
EU	Association des Industries du Poisson de l'U.E. – Comité des Organisations Nationales des Importateurs et Exportateurs de Poisson de l'U.E. (AIPCE – CEP)	Private sector
EU	Association Européenne Du Commerce De Fruits et Légumes De L'UE - European Fruit and Vegetables Trade Association	Private sector
EU	Association nationale interprofessionnelle du bétail et des viandes (Interbev)	Private sector
EU	Association of the Austrian Wood Industry	Private sector
EU	Association of European Automotive and Industrial Battery - EUROBAT	Private sector
EU	Association of European Chambers of Commerce and Industry (EUROCHAMBRES)	Private sector
EU	Association of European Heating Industry	Private sector
EU	Association of European manufacturers of sporting ammunition	Private sector
EU	Associazione Italiana dell'Industria Olearia (Assitol)	Private sector
EU	Assolatte (Italian Dairy Industry)	Private sector
EU	BDI - Federal Association of German Industries	Private sector
EU	Brainframe Technologies	Private sector
EU	Bruegel	Research
EU	Brussels Office of the Swedish Trade Unions	Trade union
EU	Bulgarian Industrial Association	Private sector
EU	Bulgarian Small and Medium Enterprises Promotion Agency	Private sector
EU	Bundesarbeitskammer Österreich	Private sector

EU	Stakeholder name (+ abbreviation)	Type of stakeholder
EU	Bundesverband der Deutschen Industrie e.V.- Federal Association of German Industries (BDI)	Private sector
EU	Bundesverband Großhandel, Außenhandel, Dienstleistungen e. V. (BGA)	Private sector
EU	Bureau de Recherches Géologiques et Minières (BRGM)	Public sector
EU	Bureau Européen de l'Agriculture Française	Private sector
EU	Bureau Européen des Unions de Consommateurs (BEUC)	Civil society
EU	Bureau International des Producteurs d'Assurances & de Réassurances (BIPAR)	Private sector
EU	Business and Industry Advisory Committee (BIAC)(OECD)	Private sector
EU	BusinessEurope	Private sector
EU	Business Center Club (Poland)	Private sector
EU	Business Finland	Private sector
EU	Business France	Private sector
EU	Business Sweden	Private sector
EU	Carbon Capture & Storage Association (CCSA)	Private sector
EU	CEFS – Comité Européen des Fabricants de Sucre	Private sector
EU	CEN – CENELEC	Private sector
EU	Central Europe Energy Partners (CEEP)	Private sector
EU	Central Organisation of Finnish Trade Unions SAK	Trade union
EU	Centre de Documentation, de Recherche et d'Information des Peuples Autochtones	Civil society
EU	Centre for European Policy Studies (CEPS)	Research
EU	Chambers of Commerce of Ireland (Chambers Ireland)	Private sector
EU	Chambre de commerce et d'industrie de région Paris Ile-de-France	Private sector
EU	Cia - Agricoltori italiani	Private sector
EU	ClientEarth	Civil society
EU	Cobalt Development Institute (CDI)	Private sector
EU	Comité des Constructeurs Français d'Automobiles (CCFA)	Private sector
EU	Comité du Commerce des Céréales, Aliments du Betail et Oleagineux, de l'U.E. (COCERAL)	Private sector
EU	Comité du commerce des céréales, aliments du bétail, oléagineux, huile d'olive, huiles et graisses et agrofournitures de l'U.E.	Private sector
EU	Comité Européen de fabricants de sucre (CEFS)	Private sector
EU	Comité Européen des Entreprises Vins (CEEV)	Private sector
EU	Committee for European Construction Equipment	Private sector
EU	Committee of the European Sugar Users (CIUS)	Private sector
EU	Confederación Española de la Pequeña y Mediana Empresa (CEPYME)	Private sector
EU	Confederación Española de Organizaciones Empresariales (CEOE)	Private sector
EU	Confederación Sindical de Comisiones Obreras (Spain)	Trade union
EU	Confederatia Sindicala Nationala MERIDIAN (CSN MERIDIAN)	Private sector
EU	Confédération des Industries Agro-Alimentaires de l'Union européenne (CIAA)	Private sector
EU	Confédération des Syndicats Chrétiens	Trade union
EU	Confederation Francaise Democratique du Travail (CFDT)	Trade union
EU	Confederation of Danish Industry (DI)	Private sector
EU	Confederation of European Environmental Engineering Societies	Private sector
EU	Confederation of European Paper Industries	Private sector
EU	Confederation of Finnish Industries (EK)	Private sector
EU	Confederation of National Hotel and Restaurant Associations (HOTREC)	Private sector

EU	Stakeholder name (+ abbreviation)	Type of stakeholder
EU	Confederation of Netherlands Industry and Employers (VNO-NCW)	Private sector
EU	Confederation of the food and drink industries of the EU (FoodDrinkEurope)	Private sector
EU	Confederation of the German Textile and Fashion Industry	Private sector
EU	Confederation Lewiatan (Poland)	Private sector
EU	Confederazione Cooperative Italiane	Private sector
EU	Confederazione Nazionale Coldiretti	Private sector
EU	Conférence des Notariats de l'Union Européenne	Private sector
EU	Conseil des barreaux de la Communauté Européenne (CCBE)	Private sector
EU	Conservation International (CI)	Civil society
EU	Consorzio Remedia	Civil society
EU	Consumer Choice Center	Civil society
EU	Construction Products Europe	Private sector
EU	Cooperativas Agro-alimentarias de España	Private sector
EU	COPA COGECA – business (agri) association	Private sector
EU	Cosmetics Europe - The Personal Care Association	Private sector
EU	Council of European Employers of the Metal, Engineering and Technology-Based Industries (CEEMET)	Private sector
EU	Critical Raw Materials Alliance (CRM Alliance)	Private sector
EU	CzechTrade	Private sector
EU	Danish Agriculture & Food Council	Private sector
EU	Danish Dairy Board Brussels s.a.	Private sector
EU	Danish Shipping	Private sector
EU	Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH	Public sector
EU	Deutscher Industrie- und Handelskammertag e.V.	Private sector
EU	DIGITALEUROPE	Private sector
EU	Direct Selling Europe AISBL	Private sector
EU	Dutch Dairy Trade Association	Private sector
EU	Dutch National Trade Union	Trade union
EU	EU Fish Processors and Traders Association (AIPCE CEP)	Private sector
EU	EU Delegation to Bahrain	Public sector
EU	EU Delegation to Kuwait	Public sector
EU	EU Delegation to Oman	Public sector
EU	EU Delegation to Qatar	Public sector
EU	EU Delegation to Saudi Arabia	Public sector
EU	EU Delegation to the United Arab Emirates	Public sector
EU	EU-GCC dialogue on economic diversification II	Public sector
EU	Ecommerce Europe	Private sector
EU	Electrical and Electronic Portuguese Enterprises Association (ANIMEE)	Private sector
EU	Employers of Poland	Private sector
EU	Enterprise Europe Network	Public sector
EU	Enterprise Estonia	Private sector
EU	Enterprise Greece	Private sector
EU	Enterprise Ireland	Private sector
EU	Enterprise Lithuania	Private sector
EU	Estonian Employers' Confederation (ETTK)	Trade union
EU	Estonian Investment Agency	Public sector
EU	European Trade Promotion Organisations (ETPO)	Private sector
EU	EU Agency for Fundamental Rights (FRA)	Public sector
EU	EU Civil Society Contact Group	Civil society
EU	EURISY	Civil society
EU	EUROALLIAGES	Private sector
EU	Eurochambres	Private sector
EU	EuroCommerce	Private sector

EU	Stakeholder name (+ abbreviation)	Type of stakeholder
EU	EURODOM	Private sector
EU	EuroGeoSurveys - The Geological Surveys of Europe (EGS)	Civil society
EU	Eurogroup for Animals	Civil society
EU	Eurometal	Private sector
EU	Euromilk	Private sector
EU	EuropaBio - European Association for Bioindustries	Private sector
EU	European & International Federation of Natural Stone Industries	Private sector
EU	European Accounting Association	Private sector
EU	European Aeronautic Defence and Space Company N.V.	Private sector
EU	European Aerosol Federation	Private sector
EU	European Aggregates Association (UEPG)	Private sector
EU	European Aluminium AISBL	Private sector
EU	European Apparel & Textile Organisation (EURATEX)	Private sector
EU	European Association for the Co-ordination of Consumer Representation in Standardisation (ANEC)	Civil society
EU	European Association of Automotive Suppliers (CLEPA)	Private sector
EU	European Association of Chemical Distributors (Fecc)	Private sector
EU	European Association of Cooperative Banks (EACB)	Private sector
EU	European Association of Craft, Small and Medium-Sized Enterprises - UEAPME, SMEUnited	Private sector
EU	European Association of Dairy Trade (Eucolait)	Private sector
EU	European Association of Fashion retailers	Private sector
EU	European Association of Fruit and Vegetable Processors – PROFEL	Private sector
EU	European Association of Internet Services Providers (ISPA)	Private sector
EU	European Association of Metals Eurometaux	Private sector
EU	European Association of Mining Industries, Metal Ores & Industrial Minerals (Euromines)	Private sector
EU	European Association of Mutual Guarantee Societies	Private sector
EU	European Association of Sugar Manufacturers	Private sector
EU	European Association of Sugar Traders (ASSUC)	Private sector
EU	European Association of the Machine Tool Industries (CECIMO)	Private sector
EU	European Association representing the agricultural machinery industry (CEMA)	Private sector
EU	European Automobile Manufacturers Association (ACEA)	Private sector
EU	European Aviation Clusters Partnership	Private sector
EU	European Banking Federation (EBF)	Private sector
EU	European Biodiesel Board	Private sector
EU	European Bioplastics E.V.	Private sector
EU	European Branded Clothing Alliance	Private sector
EU	European Brands Association	Private sector
EU	European Broadcasting Union (EBU)	Private sector
EU	European Builders Confederation	Private sector
EU	European Business Aviation Association (EBAA)	Private sector
EU	European Business Services Round Table	Private sector
EU	European Cement Association (CEMBUREAU)	Private sector
EU	European Centre for International Political Economy (ECIPE)	Private sector
EU	European Ceramic Industry Association (Cerame-Unie)	Private sector
EU	European Chemical Industry Council (Cefic)	Private sector
EU	European Cocoa Association	Private sector
EU	European Commission	Public body
EU	European Committee for Electrotechnical Standardization	Civil society
EU	European Committee of Domestic Equipment Manufacturers (CECED)	Private sector
EU	European Committee of Environmental Technology Suppliers Association	Private sector

EU	Stakeholder name (+ abbreviation)	Type of stakeholder
EU	European Community Shipowner's Associations	Private sector
EU	European Competitive Telecommunications Association	Private sector
EU	European Concrete Paving Association	Private sector
EU	European Confederation of Independent Trade Unions	Trade union
EU	European Confederation of Iron and Steel Industries (EUROFER)	Private sector
EU	European Confederation of Junior Enterprises	Private sector
EU	European Confederation of Medical Devices Associations (EUROMED)	Private sector
EU	European Confederation of Woodworking Industries (CEI-Bois)	Private sector
EU	European Construction Industry Federation	Private sector
EU	European Consumer Organisation (BEUC)	Civil society
EU	European Coordination Committee of the Radiological, Electromedical and Healthcare IT Industry (COCIR)	Private sector
EU	European Coordination of Independent Producers (CEPI)	Private sector
EU	European Council for Automotive R&D (EUCAR)	Private sector
EU	European Council for Motor Trades and Repairs (CECRA)	Private sector
EU	European Croplife Europe	Private sector
EU	European Culturaland Creative Industries Alliance (ECCIA)	Private sector
EU	European Dairy Association	Private sector
EU	European Diagnostic Manufacturers Association (EDMA)	Private sector
EU	European Diisocyanate and Polyol Producers Association	Private sector
EU	European Disposables & Nonwovens Association (EDANA)	Private sector
EU	European DIY Retail Association	Private sector
EU	European Ecommerce and Omni-Channel Trade Association	Private sector
EU	European Economic and Social Committee (EESC)	Public sector
EU	European Electronic Component Manufacturers Association	Private sector
EU	European Engineering Industries Association (EUUnited)	Private sector
EU	European Environment Agency (EEA)	Public sector
EU	European Environmental Bureau (EEB)	Public sector
EU	European Expanded Clay Association (EXCA)	Private sector
EU	European Express Association	Private sector
EU	European External Action Service (EEAS)	Public body
EU	European Family Businesses	Private sector
EU	European Farmers	Private sector
EU	European Federation for Construction Chemicals	Private sector
EU	European Federation for Cosmetic Ingredients	Private sector
EU	European Federation of Biotechnology Section of Applied Biocatalysis	Private sector
EU	European Federation of Cleaning Industries	Private sector
EU	European Federation of Engineering Consultancy Associations	Private sector
EU	European Federation of Food, Agriculture and Tourism Trade Unions – EFFAT	Trade union
EU	European Federation of Foundation Contractors	Private sector
EU	European Federation of Geologists (EFG)	Other
EU	European Federation of National Associations of Water and Wastewater Services	Private sector
EU	European Federation of Pharmaceutical Industries & Associations (EFPIA)	Private sector
EU	European Federation of Public Service Unions (EPSU)	Trade union
EU	European Federation of the Footwear industry	Private sector
EU	European Fish Processors & Traders Association	Private sector
EU	European Franchise Federation	Private sector
EU	European Fruit and Vegetables Trade Association (EUROFEL)	Private sector
EU	European Furniture Industries Confederation	Private sector

EU	Stakeholder name (+ abbreviation)	Type of stakeholder
EU	European Health Industry Business Communications Council (EHIBCC)	Private sector
EU	European Industrial Gases Association	Private sector
EU	European Liaison Committee for Agriculture and agri-food trade (CELCAA)	Private sector
EU	European Lime Association (EULA)	Private sector
EU	European Man-made Fibres Association (CIRFS)	Private sector
EU	European Medical Technology Industry Associations (MedTech Europe)	Private sector
EU	European Milk Board	Private sector
EU	European Network of Migrant Women	Civil society
EU	European Network of National Human Rights Institutions	Public sector
EU	European Network of Political Foundations	Civil society
EU	European Newspaper Publishers' Association (ENPA)	Private sector
EU	European Organisation for Security	Public sector
EU	European Organisation of Tomato Industries (OEIT)	Private sector
EU	European Organisation for Packaging and the Environment	Private sector
EU	European Panel Federation	Private sector
EU	European Parliament	Public sector
EU	European Patent Office	Public sector
EU	European Petroleum Refiners Association (FuelsEurope)	Private sector
EU	European Petroleum Industry	Private sector
EU	European Photonics Industry Consortium (EPIC)	Private sector
EU	European Plaster and Plasterboard Manufacturers Association (EUROGYPSUM)	Private sector
EU	European Policy Centre (EPC)	Research
EU	European Potato Processors' Association	Private sector
EU	European Potato Trade Association	Private sector
EU	European Power Tool Association	Private sector
EU	European Producers Union of Renewable Ethanol (ePURE)	Private sector
EU	European Property Federation	Private sector
EU	European Public and Real Estate Association (EPRA)	Private sector
EU	European Public Health Alliance	Civil society
EU	European Regions Airline Association (ERA)	Private sector
EU	European Renewable Ethanol Association – EPURE	Private sector
EU	European Retail Round Table	Private sector
EU	European Robotics Association (EUUnited Robotics)	Private sector
EU	European Round Table of Industrialists	Private sector
EU	European Satellite Operator's Association	Private sector
EU	European Savings Banks Group (ESBG)	Private sector
EU	European Sea Ports Organisation	Private sector
EU	European Semiconductor Industry Association (ESIA)	Private sector
EU	European Service Forum (ESF)	Private sector
EU	European Services Strategy Unit	Civil society
EU	European Shippers' Council	Private sector
EU	European Small Business Alliance	Private sector
EU	European Steel Association (EUROFER)	Private sector
EU	European Steel Technology Platform (ESTEP)	Private sector
EU	European Steel Tube Association (ESTA)	Private sector
EU	European Strategic Partnerships Observatory (ESPO)	Public sector
EU	European Sugar Refineries Association	Private sector
EU	European Technology Platform on Sustainable Mineral Resources (ETP SMR)	Civil society
EU	European Telecommunications Network Operators' Association (ETNO)	Private sector
EU	European Telecommunications Standards Institute (ETSI)	Research
EU	European Textile Collectivities Association	Private sector

EU	Stakeholder name (+ abbreviation)	Type of stakeholder
EU	European Toner & Inkjet Remanufacturers' Association	Private sector
EU	European Trade Union Committee for Education	Trade union
EU	European Trade Union Confederation - ETUC	Trade union
EU	European Trade Union Institute (ETUI)	Trade union
EU	European Transport Workers' Federation	Trade union
EU	European Travel Agents' and Tour Operators' Associations	Private sector
EU	European Travel Commission	Private sector
EU	European Turbine Network	Private sector
EU	European Tyre & Rubber Manufacturers' Association (ETRMA)	Private sector
EU	European Union Intellectual Property Office (EUIPO)	Public sector
EU	European Union Road Federation	Private sector
EU	European Whey Processors Association	Private sector
EU	European Wildlife	Civil society
EU	European Women's Lobby	Civil society
EU	Europêche	Private sector
EU	Eurospace - Trade association of the European space industry	Private sector
EU	Eurothon	Private sector
EU	Extended Producer Responsibility Alliance	Private sector
EU	Fair Trade Advocacy Office (FTAO)	Civil society
EU	Fairwatch	Civil society
EU	Family Business Network International	Private sector
EU	Federación de Industrias del Calzado Español (FICE)	Private sector
EU	Fédération des Experts Comptables Européens (FEE)	Private sector
EU	Fédération Internationale de l'Automobile (FIA)	Private sector
EU	Fédération Internationale du Recyclage	Private sector
EU	Federation of European Publishers	Private sector
EU	Federation of European Rice Millers	Private sector
EU	Federation of International Employers (FedEE)	Private sector
EU	Federation of Polish Entrepreneurs	Private sector
EU	Federation of the European Sporting Goods Industry	Private sector
EU	FederlegnoArredo - Federazione Italiana delle Industrie del Legno, del Sughero, del Mobile e dell'Arredamento	Private sector
EU	FEDIOL, the EU vegetable oil and protein-meal industry association	Private sector
EU	FEDOLIVE (Fédération de l'Industrie de l'Huile d'Olive de l'UE)	Private sector
EU	Fedustria	Private sector
EU	Female Europeans of Medium and Small Enterprises (FEM)	Civil society
EU	Fertilizers Europe	Private sector
EU	Finpro of Finland	Public sector
EU	Fiskbranchens Riksförbund (Association of Swedish fish producers)	Private sector
EU	Flanders Investment and Trade	Private sector
EU	Florence Edy-Legrand (France)	Private sector
EU	Foreign Trade Association (Amfori)	Private sector
EU	Forest-based Sector Technology Platform (FTP)	Private sector
EU	Fratini Vergano	Private sector
EU	Fraunhofer-Gesellschaft (FhG)	Private sector
EU	Freshfel Europe - the forum for the European freshfruits and vegetables chain	Private sector
EU	Friedrich-Ebert-Stiftung	Civil society
EU	Friends of Europe	Civil society
EU	Friends of the Earth Europe (FoEE)	Civil society
EU	FRUCOM	Private sector
EU	FruitVegetablesEurope (EUCOFEL)	Private sector

EU	Stakeholder name (+ abbreviation)	Type of stakeholder
EU	Fur Europe	Private sector
EU	Gelatine Manufacturers of Europe (GME)	Private sector
EU	German Federal Association of Senior Citizens' Organisations - BAGSO	Civil society
EU	German Federation of Liberal Professions (BFB)	Private sector
EU	German Marshall Fund of the United States	Civil society
EU	German Trade Union Confederation (DGB)	Trade union
EU	Germany Trade & Invest	Public sector
EU	Glass Alliance Europe	Private sector
EU	Global Industrial and Social Progress Research Institute (GISPRI)	Research
EU	Global Witness	Civil society
EU	Green Earth Center	Civil society
EU	Health Action International (Europe)	Civil society
EU	Health First Europe	Civil society
EU	HEPA Hungarian Export Promotion Agency	Public sector
EU	Hub.brussels	Public sector
EU	Human Rights Watch	Civil society
EU	Humane Society International/Europe	Civil society
EU	ICEX España Exportación e Inversiones	Public sector
EU	ICMP - the global voice of music publishing	Private sector
EU	IFPI Representing recording industry worldwide	Private sector
EU	IHK-Nord e.V. - Arbeitsgemeinschaft norddeutscher Industrie- und Handelskammern	Private sector
EU	IHK Region Stuttgart	Private sector
EU	Independent Retail Europe	Private sector
EU	Independent Self-Governing Trade Union 'Solidarity' (NSZZ 'Solidarność') (Poland)	Trade union
EU	Industrial Ethanol Association	Private sector
EU	Industrial Minerals Association - Europe (IMA-Europe)	Private sector
EU	IndustriAll European Trade Union (IndustriAll)	Trade union
EU	Institute for European Environmental Policy (IEEP)	Civil society
EU	Institouto Geologikon kai Metalleftikon Erevnon (IGME)	Private sector
EU	Instituto Cuestiones Agrarias y Medioambientales	Private sector
EU	Insurance Europe	Private sector
EU	Insurers of Europe (CEA)	Private sector
EU	Intelligent Transport Systems - Europe (ERTICO)	Private sector
EU	International Association for Textile Care Labelling	Private sector
EU	International Association of Users of Artificial and Synthetic Filament Yarns and of Natural Silk	Private sector
EU	International Confederation of European Beet Growers	Private sector
EU	International Confederation of Inspection and Certification Organizations	Public sector
EU	International Confederation of Music Publishers	Private sector
EU	International Co-operative Alliance	Civil society
EU	International Federation for Human Rights (FIDH)	Civil society
EU	International Federation of Inspection Agencies	Public sector
EU	International Federation of Reproduction Rights	Civil society
EU	International Flower Trade Association	Private sector
EU	International Institute for Sustainable Development (IISD)	Research
EU	International Land Coalition	Civil society
EU	International Network for Sustainable Energy - INFORSE-Europe	Civil society
EU	International Office for Human Rights	Civil society
EU	International Society for Mangrove Ecosystems (ISME)	Civil society
EU	International Society of Transport Aircraft Trading	Private sector
EU	International Tin Association Ltd (ITRI)	Private sector

EU	Stakeholder name (+ abbreviation)	Type of stakeholder
EU	International Trade Union Confederation (ITUC)	Trade union
EU	International Trademark Association	Private sector
EU	Investment and Development Agency of Latvia	Public sector
EU	Irish Business and Employers' Confederation (IBEC)	Private sector
EU	Irish Congress of Trade Unions	Trade union
EU	Irish Farmers' Association	Private sector
EU	Italian National Agency for New Technologies, Energy and Sustainable Economic Development (ENEA)	Public sector
EU	Italian Trade Promotion Agency	Public sector
EU	Italian Trade Union Confederation	Trade union
EU	Justice et Paix	Civil society
EU	Kommerskollegium	Public sector
EU	Landwirtschaftskammer Österreich	Private sector
EU	Latvian Traders Association	Private sector
EU	Lighting Europe	Private sector
EU	Lithuanian Education Trade Union	Trade union
EU	Maa-ja metsätaloustuottajain Keskusliitto - Central Union of Agricultural Producers and Forest Owners	Private sector
EU	Médecins Sans Frontières International	Civil society
EU	Medicines for Europe	Private sector
EU	Montanuniversitaet Leoben (MUL)	Research
EU	Mouvement des Entreprises de France (MEDEF)	Private sector
EU	Nanofutures	Private sector
EU	NanoMEGAS	Private sector
EU	National Confederation of Christian Trade Unions (CNV)	Civil society
EU	Nemzeti Agrárgazdasági Kamara	Private sector
EU	Netherlands Council for Trade Promotion	Public sector
EU	Netherlands Enterprise Agency	Public sector
EU	Network Women in Development Europe (WIDE)	Civil society
EU	New European Business Confederation	Private sector
EU	OLAF	Public sector
EU	ORGALIME (European Engineering Industries Association)	Private sector
EU	Organisation pour un réseau international d'indications géographiques	Civil society
EU	oriGIn EU	Private sector
EU	Österreichischer Gewerkschaftsbund	Private sector
EU	Oxfam International	Civil society
EU	Plastics Recyclers Europe	Private sector
EU	Platform of European Social NGOs	Civil society
EU	Polish Investment and Trade Agency	Public sector
EU	Primary Food Processors	Private sector
EU	Promote Iceland	Public sector
EU	Romania Trade and Invest	Public sector
EU	Rosa Luxemburg Stiftung	Civil society
EU	Rosa Luxemburg Stiftung Brussels Office	Civil society
EU	Slovak Investment and Trade Development Agency	Public sector
EU	SMEUnited	Private sector
EU	Social Economy Europe	Civil society
EU	Société des auteurs et compositeurs dramatiques	Private sector
EU	Solar Power Europe	Private sector
EU	Spanish Association of Soft Drinks Manufacturers	Private sector
EU	Spanish General Workers' Union - UGT	Trade union
EU	SPIRIT Slovenia, Public Agency	Public sector
EU	spiritsEUROPE	Private sector
EU	STARCH EUROPE	Private sector
EU	Stiftung Onderzoek Multinationale Ondernemingen	Research
EU	Swedish Enterprise	Private sector

EU	Stakeholder name (+ abbreviation)	Type of stakeholder
EU	Testing, Inspection and Certification Council	Private sector
EU	Textilimportörerna (Textile, Clothing, Hometextile and Shoe Importers Association in Sweden)	Private sector
EU	The Confederation of National Associations of Tanners and Dressers of the European Community (COTANCE)	Private sector
EU	The EU Vegetable Oil and Proteinmeal Industry	Private sector
EU	Tobacco Europe	Private sector
EU	Trade Council of the Ministry of Foreign Affairs of Denmark	Public sector
EU	TradeMalta	Public sector
EU	Trade Promotion Europe	Private sector
EU	Trade Union Advisory Committee (of the OECD) (TUAC)	Trade union
EU	Trade Unions Forum (Forum Związków Zawodowych, FZZ) (Poland)	Trade union
EU	Transport and Environment (European Federation for Transport and Environment)	Civil society
EU	Umicore	Private sector
EU	UNIFE	Private sector
EU	Union des Confédérations de l'Industrie et des Employeurs d'Europe – UNICE	Trade union
EU	Union des Industries Textiles (UIT)	Private sector
EU	Union Européenne du Commerce du Bétail et des Métiers de la Viande	Private sector
EU	Union of the Czech Production Cooperatives	Private sector
EU	Unrepresented Nations and Peoples Organisation (UNPO)	Civil society
EU	Utrecht Sustainability Institute	Research
EU	Verband der Chemischen Industrie e.V.	Private sector
EU	Verband Deutscher Maschinen-und Anlagenbau e.V.	Private sector
EU	VZBV (Federation of German Consumer Organisations) – Verbraucherzentrale Bundesverband	Civil society
EU	Wind Europe	Private sector
EU	Wirtschaftskammer Österreich	Private sector
EU	WO=MEN Dutch Gender Platform	Civil society
EU	Women Engage for a Common Future	Civil society
EU	Women's Economic and Social Think Tank	Civil society
EU	Women's Environment and Development Organization	Civil society
EU	Women's International Studies Europe	Civil society
EU	World Spirits Alliance	Private sector
EU	WWF European Policy Programme (WWF EPO)	Civil society
EU	Zentralverband des Deutschen Handwerks e.V.	Private sector
EU	Zentralverband Elektrotechnik-und Elektronikindustrie e.V.	Private sector
International	Coopération Internationale pour le Développement et la Solidarité (CIDSE)	Civil society
International	Food and Agriculture Organization (FAO)	Int organisation
International	International Food Policy Research Institute (IFPRI)	Research
International	International Institute for Environment and Development (IIED)	Civil society
International	International Institute for Sustainable Development (IISD)	Civil society
International	International Labour Organization (ILO)	Int organisation
International	International Transport Workers' Federation	Trade union
International	International Union for Nature	Civil society
International	Organisation for the UN High Commissioner for Human Rights (OHCR)	Int organisation
International	UN Development Programme (UNDP)	Int organisation
International	UN Environment Programme (UNEP)	Int organisation
International	UN Framework Convention on Climate Change (UNFCCC)	Int organisation
International	UN Human Rights Council (UNHRC)	Int organisation
International	UN Women	Int organisation
International	World Bank (WB)	Int organisation
International	World Wild Fund for Nature (WWF)	Civil society

Source: own compilation

III.2 List of GCC stakeholders

GCC member	Stakeholder name (+ abbreviation)	Kind of stakeholder
(1)	(2)	(3)
Bahrain	Arabian Gulf University (AGU) Environmental Research Center	Research
Bahrain	Bahrain Chamber of Commerce and Industry	Private sector
Bahrain	Bahrain Economic Development Board	Public sector
Bahrain	Bahrain Environment Society	Civil society
Bahrain	Bahrain Free Labour Unions Federation	Trade union
Bahrain	Bahrain Forum for Human Rights	Civil society
Bahrain	Bahrain Human Rights Society	Civil society
Bahrain	Bahrain SMEs Development Society	Public sector
Bahrain	Bahrain Transparency Society	Civil society
Bahrain	Bahrain Women Union	Civil society
Bahrain	Bahrain Women Association – for Human Development	Civil society
Bahrain	Consumer Protection Directorate – Ministry of Industry and Commerce	Public sector
Bahrain	Contemporary Women Society	Civil society
Bahrain	Export Bahrain	Public sector
Bahrain	Environment Friends Society	Public sector
Bahrain	Gender Balance Center	Public sector
Bahrain	General Federation of Bahrain Trade Unions	Trade union
Bahrain	International Labour Organization (ILO) Regional Office for Arab States	Int organisation
Bahrain	Ministry of Foreign Affairs – Economy and Investment	Public sector
Bahrain	Ministry of Foreign Affairs – Human Rights Directorate	Public sector
Bahrain	Ministry of Finance and National Economy	Public sector
Bahrain	Ministry of Labour	Public sector
Bahrain	National Institution for Human Rights NIHR	Research
Bahrain	Prisoners and Detainees Rights Commission PDRC	Public sector
Bahrain	Public Prosecution – Special Investigation Unit SIU	Public sector
Bahrain	Office of the Ombudsman – Ministry of Interior	Public sector
Bahrain	Supreme Council for Women	Public sector
Bahrain	Supreme Council for Environment	Public sector
Bahrain	UNDP - Bahrain	Int organisation
Bahrain	UNEP Regional Office for West Asia	Civil society
Bahrain	World Health Organization WHO	Int organisation
Kuwait	AlManakh – Climate Action & Sustainability	Civil society
Kuwait	Consumer Protection Association	Civil society
Kuwait	Consumer Protection Department, Ministry of Commerce and Industry	Public sector
Kuwait	Environment Public Authority	Public sector
Kuwait	Kuwait Chamber of Commerce and Industry	Private sector
Kuwait	Kuwait Direct Investment Promotion Authority	Public sector
Kuwait	Kuwait Economic Society	Private sector
Kuwait	Kuwait Environment Protection Society	Public sector
Kuwait	Kuwait Industries Union	Private sector
Kuwait	Kuwait Institute for Scientific Research (KISR)	Research
Kuwait	Kuwait Society for Human Rights	Civil society
Kuwait	Kuwait Trade Union Federation	Trade union
Kuwait	Kuwait Society of Engineers	Trade union
Kuwait	Kuwait Union of Women's Associations	Civil society
Kuwait	National Diwan for Human Rights	Civil society
Kuwait	Oil and Petrochemical Industries Workers Confederation	Train Union

GCC member	Stakeholder name (+ abbreviation)	Kind of stakeholder
Kuwait	Public Authority for Industry	Public sector
Kuwait	Regional Organization for the Protection of the Marine Environment	Public sector
Kuwait	Union of Investment Companies	Private sector
Oman	Consumer Protection Authority	Public sector
Oman	Environment Authority of Oman	Public sector
Oman	EU-Oman Energy & Water Collaboration Forum	Public sector
Oman	General Federation of Oman Workers	Trade union
Oman	Invest Oman	Public sector
Oman	Middle East Desalination Research Center	Research
Oman	Ministry of Commerce, Industry & Investment Promotion	Public sector
Oman	Ministry of Justice and Legal Affairs MJLA	Public sector
Oman	Ministry of Labour	Public sector
Oman	Ministry of Social Development -Directorate General for Persons with Disabilities	Public sector
Oman	Ministry of Social Development – Family Protection Department (Dar al-Wifaq Shelter)	Public sector
Oman	Ministry of Social Development – Child Welfare Centre and Juvenile Reform Facilities	Public sector
Oman	Ministry of Social Development - Elderly Department	Public sector
Oman	National Centre for Statistics & Information	Public sector
Oman	National Committee to Combat Human Trafficking	Public sector
Oman	Public Prosecution – Prison Complaints Office	Public sector
Oman	Oman Chamber of Commerce and Industry	Private sector
Oman	Oman Environment Society	Civil society
Oman	Oman Exports	Public sector
Oman	Oman Human Rights Commission OHRC	Public sector
Oman	Omani Women's Association OWA	Civil society
Qatar	Abdullah Bin Hamad Al-Attiyah Foundation	Public sector
Qatar	Arab Democracy Foundation ADF	Civil society
Qatar	Arab Youth Climate Movement Qatar	Civil society
Qatar	Doha International Family Institute DIFI	Research
Qatar	Doha Institute for Graduate Studies DI	Research
Qatar	Earthna (Qatar Foundation)	Research
Qatar	Environmental Science Center – Qatar University	Research
Qatar	Friends of the Environment Center	Public sector
Qatar	ILO Project Office for the State of Qatar	Int organisation
Qatar	Investment Promotion Agency Qatar	Public sector
Qatar	Middle East Council on Global Affairs	Civil society
Qatar	Ministry of Environment & Climate Change	Public sector
Qatar	Ministry of Justice	Public sector
Qatar	Ministry of Social Development and Family MSDF	Public sector
Qatar	Ministry of Labour	Public sector
Qatar	National Human Rights Committee (NHRC)	Public sector
Qatar	Public Prosecution (Special Human Rights Units)	Public sector
Qatar	Qatar Chamber of Commerce and Industry	Private sector
Qatar	Qatari Centre of Social Cultural for the Deaf QCSCD	Civil society
Qatar	Qatar Charity	Civil society
Qatar	Qatar Foundation	Civil society
Qatar	Qatar Environment and Energy Research Institute (QEERI)	Research
Qatar	Qatar Free Zones Authority	Public sector
Qatar	UNDP Qatar	Int organisation
Qatar	UNICEF Qatar	Int organisation
KSA	Al-Nahda Philanthropic Society for Women	Civil society
KSA	Disabled Children's Association	Civil society
KSA	Family Affairs Council	Public sector
KSA	Federation of Saudi Chambers	Private sector

GCC member	Stakeholder name (+ abbreviation)	Kind of stakeholder
KSA	Gulf Petrochemicals and Chemicals Association (GPCA)	Private sector
KSA	Human Rights Commission	Public sector
KSA	International Organization for Migration IOM	Int organisation
KSA	Insan	Civil society
KSA	KAPSARC Saudi Arabia (King Abdullah Petroleum Studies and Research Centre)	Civil society
KSA	King Abdulaziz Center for National Dialogue	Public sector
KSA	King Abdullah University of Science and Technology, Center of Excellence Renewable Energy and Storage Technologies	Research
KSA	King Faisal Center for Research and Islamic Studies	Research
KSA	King Khalid Foundation KKF	Civil society
KSA	King Salman Center for Environmental Studies	Research
KSA	Ministry of Environment, Water, and Agriculture	Public sector
KSA	Ministry of Human Resources and Social Development MHRSD	Public sector
KSA	Ministry of Investment	Public sector
KSA	Monsha'at SME agency	Private sector
KSA	NEOM Eco-City	Public sector
KSA	Public Prosecution (Specialized Human Rights Units	Public sector
KSA	National Committee to Combat Human Trafficking	Public sector
KSA	National Society for Human Rights (NSHR)	Civil society
KSA	Saudi Committee for the Labour Market	Private sector
KSA	Saudi Data and AI Authority SDAIA	Public sector
KSA	Saudi Environment Society	Civil society
KSA	Saudi Exports	Public sector
KSA	Saudi National Committee of Workers Committees	Civil society
KSA	Saudi Sustainability Talks	Civil society
KSA	Sustainability Professionals of Saudi Arabia	Private sector
KSA	UNHCR -Saudi Arabia Office	Int organisation
KSA	UNICEF -Saudi Arabia Office	Int organisation
UAE	Abu Dhabi Chamber of Commerce & Industry	Public sector
UAE	Abu Dhabi Investment Office	Public sector
UAE	Anwar Gargash Diplomatic Academy	Research
UAE	Assembly for Occupational Societies in the UAE	Civil society
UAE	AZRAQ – Ocean Conservation	Civil society
UAE	Bee'ah	Civil society
UAE	Dubai Chambers	Public sector
UAE	Dubai Foundation for Women and Children DFWAC	Civil society
UAE	Emirates Association of Lawyers and Legal Professionals	Civil society
UAE	Emirate Environmental Group	Civil society
UAE	Emirates Human Rights Association EHRA	Civil society
UAE	Emirates Nature – WWF	Civil society
UAE	Emirates Red Crescent	Civil society
UAE	Federal Authority for Identity, Citizenship, Customs and Ports Security ICP	Public sector
UAE	Federal Public Prosecution (Specialized Human Rights Units)	Public sector
UAE	ILO -Regional Office for Arab States	Int organisation
UAE	IOM -UAE Mission	Int organisation
UAE	Khalifa university – Sustainable Engineering Programme	Research
UAE	Masdar City	Private sector
UAE	Masdar Institute of Science and Technology	Research
UAE	Ministry of Climate Change & Environment	Public sector
UAE	Ministry of Community Development MOCD	Public sector
UAE	Ministry of Economy	Public sector
UAE	Ministry of Human Resources and Emiratization MOHRE	Public sector
UAE	National Committee to Combat Human Trafficking NCCHT	Public sector
UAE	National Human Rights Institution NHRI	Public sector

GCC member	Stakeholder name (+ abbreviation)	Kind of stakeholder
UAE	Sharjah City for Humanitarian Services SCHS	Civil society
UAE	Sharjah Chamber of Commerce and Industry	Public sector
UAE	The Abu Dhabi Sustainability Group	Public sector
UAE	UAE Chamber of Commerce and Industry	Private sector
UAE	UAE Federation of Chambers	Private sector
UAE	UAE Gender Balance Council	Public sector
UAE	UNICEF Gulf Area Office	Int organisation
UAE	UNHCR – UAE Office	Int organisation
UAE	Zayed University -Institute for Social and Economic Research ZUISER	Research
GCC	EU-GCC dialogue on economic diversification II	Public sector
GCC	EU GCC Green Transition Project: Building a Sustainable Future Together	Public sector
GCC	Human Rights Office – GCC General Secretariat	Public sector
GCC	The Arab Forum for Environment and Development	Civil society
GCC	The Gulf Organisation for Research and Development (GEDO)	Civil society
GCC	Gulf Centre for Human Rights	Civil society
GCC	Migrant-Rights.org	Trade union

Source: own compilation

ANNEX IV: CASE STUDY SELECTION

This Annex outlines the approach and selection of case studies as part of this SIA. The case studies aim to provide in-depth insights into how the EU-GCC FTA/SPAs could influence the EU and GCC economically, but also when looking at the social, environmental and human rights effects.

IV.1. Objectives

The objective of the case studies is to understand opportunities and challenges for trade and investment, covering areas where the EU-GCC FTA/SPAs are expected to be more relevant (both positive and negative) or where there could be untapped potential.

IV.2. Selection of case studies

Four case studies have to be selected to meet the abovementioned objectives. The following criteria will be applied to come to this prioritisation and selection:

- Importance of an issue for the EU's strategic objectives;
- Importance of an issue from an economic, social, HR or environmental angle;
- Importance of an issue from a sectoral perspective and an individual Gulf country perspective (creating GCC member – sectoral nexus case studies);
- Estimated magnitude of the expected economic (based on the CGE results), social, HR and environmental impact;
- Stakeholder issues of special importance (from the consultation process);
- Characteristics and specificities of the trade agreement under negotiation (i.e. allowing for intra-regional differences between individual EU-GCC member FTAs); and
- Issues of particular relevance/importance/sensitivity from a negotiating perspective.

As a result of applying these seven selection criteria, a short-list of case studies is being proposed for final selection, while awaiting information for the finalisation of this short-list into four case studies, as shown in Table IV.1. In Table IV.1 for each of the criteria, a rank for the degree to which the case study topic matches the criteria. A value of '1' is regular contribution, a value of '2' is high degree of contribution and '3' signifies a very high contribution.

On the left in the table, the proposed case studies are listed. Column (1) focuses on the link of the case study to the EU strategic objectives. The higher the score the more directly linked a case study topic is to those objectives. Column (2) covers the link between the suggested case study topics and the four sustainability pillars. For example, trade in environmental goods and services with UAE has a strong link to the environmental and economic pillars, but less strong to the social and human rights pillars. Column (3) highlights the sectoral importance of each of the case study topics. Column (4) focuses on the link to specific GCC members (because each case study is narrowly defined as a topic linked to one GCC member). In column (5) the expected effect from the CGE economic model criteria is added. At this stage, because the CGE results are not yet available, this criterion is not measured. Based on first stakeholder consultations and feedback from the CSD meeting, the stakeholder perspective (column (6)) is shown. The final criterion, in column (7), link the suggested case study topics to their relevance for the ongoing negotiations. Finally, in column (8), all ranks are added up into the total selection score – and all case studies are ranked based on this column, from most matching the criteria to least matching them.

Table IV.1: Case study prioritisation matrix

Case study suggestion	C1: EU strategic objectives	C2: Eco / Soc / Env/ HR importance	C3: Sectoral importance	C4: GCC member importance	C5: Expected impact (CGE)	C6: Stakeholder perspective	C7: Negotiating perspective	TOTAL (rank)
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
EU-GCC trade in environmental goods and services (UAE)	3	Eco: 3; Soc: 1; Env: 3; HR: 1; Av: 2	3	3	NA	3	3	17
Green hydrogen and green tech collaboration (Qatar or KSA)	3	Eco: 2; Soc: 1; Env: 3; HR: 1; Av: 1.75	3	3	NA	3	3	16.75
Women's and youth employment (Bahrain, Kuwait)	3	Eco: 1; Soc: 3; Env: 1; HR: 3; Av: 2	2	3	NA	3	3	16
Responsible supply chains in textiles or chemicals (KSA)	3	Eco: 2; Soc: 2; Env: 1; HR: 2; Av: 1.75	3	2	NA	2	2	13.75
Biodiversity impact of the SPA/FTAs (UAE, KSA)	3	Eco: 2; Soc: 1; Env: 3; HR: 1; Av: 1.75	3	2	NA	2	2	13.75
EU green technology exports (KSA)	3	Eco: 2; Soc: 1; Env: 3; HR: 1; Av: 1.75	2	2	NA	2	3	13.75
Plastics pollution and marine litter (KSA and UAE)	2	Eco: 1; Soc: 1; Env: 3; HR: 2; Av: 1.75	3	2	NA	3	2	13.75
Migrant worker protection in renewable energy supply chains (Kuwait or UAE)	2	Eco: 2; Soc: 3; Env: 2; HR: 3; Av: 2.5	2	3	NA	3	1	13.50
Boosting SMEs in hospitality & tourism services (UAE or KSA)	2	Eco: 2; Soc: 1; Env: 1; HR: 1; Av: 1.25	3	2	NA	3	2	13.25
Trade facilitation through GCC free zones (UAE)	2	Eco: 3; Soc: 2; Env: 1; HR: 1; Av: 1.75	2	2	NA	3	2	12.75
Fishing and aquaculture opportunities (Oman or KSA)	2	Eco: 2; Soc: 1; Env: 2; HR: 1; Av: 1.5	3	2	NA	2	2	12.50
Aluminium value chain dynamics (UAE or Bahrain)	3	Eco: 3; Soc: 1; Env: 2; HR: 1; Av: 1.75	3	2	NA	1	1	11.75
Public health access to medicines (Oman)	2	Eco: 1; Soc: 2; Env: 1; HR: 3; Av: 1.75	2	2	NA	2	1	10.75

As a result, and in line with the TS, the preliminary proposal is (subject to data availability) to look at: **1) EU-UAE trade in environmental goods and services; 2) Green hydrogen and green tech collaboration with Bahrain; 3) Women's youth and employment in Kuwait; 4) Responsible supply chains in textiles or chemicals with Saudi-Arabia.**

ANNEX V: QUALITY ASSURANCE AND RISK MANAGEMENT

IV.1 Introduction and overview

This section summarises the quality control (QC) system for the SIA, recognising that the study is multi-component, highly visible, and will feed into external communication. The study must be methodologically sound, inclusive on stakeholder coverage, and clearly written in English.

The Tender Specifications require four QC elements: (i) quality of deliverables, (ii) quality of the work plan (timetable and outputs), (iii) language quality checks, and (iv) continuity of service in case of staff absence. To meet these requirements, the approach applies QC at the level of expert research work, key deliverables, and the project as a whole.

A three-layer QC model underpins delivery: **Layer 1** task-level QC by work package (WP) leads; **Layer 2** key deliverable QC by Study Team Leadership and the Quality Advisory Board (QAB); and **Layer 3** overall QC by Study Team Leadership and English-language editors.

IV.2 Seven quality control mechanisms

Seven mechanisms are embedded in the work plan to ensure delivery on time, within budget, and to high standards across the three QC layers:

- **M1 Governance and decision-making:** clear accountability via a Project Manager (team leader) and two deputies (EU and GCC), WP leaders for day-to-day delivery and QC, and documented escalation protocols for delays, risks, or disputes.
- **M2 Deliverable review and validation:** internal peer review for every deliverable; a quality checklist (format, scope, methodology, references); and dedicated time allocated for revision cycles, QAB engagement, and incorporation of external feedback prior to submission to the Commission.
- **M3 Measurable quality indicators:** schedule adherence, number of stakeholders engaged, and compliance with open science, gender equality, and ethics requirements.
- **M4 Risk management and mitigation:** a risk register linked to concise monthly updates on progress; predefined contingencies (e.g. resource reallocation); and monthly review and reporting to the Commission.
- **M5 Continuous monitoring and feedback loops:** monthly core team meetings to track milestones and integrate lessons learned; systematic integration of stakeholder feedback into draft deliverables.
- **M6 Ethics and compliance checks:** GDPR compliance, adherence to open science requirements, and strict plagiarism controls.
- **M7 External QAB:** independent experts provide structured review and improvement suggestions on draft deliverables.

IV.3 Quality assurance and risk management on deliverables

Deliverable quality relies primarily on **M1–M4**, complemented by **M5** and **M7**. Governance arrangements clarify responsibilities and reporting lines for Study Team Leadership and WP coordinators, supported by monthly core team meetings (including QAB chair involvement) to manage progress, interdependencies, and emerging challenges. The intended result is a predictable production sequence and shared understanding of internal and external QC steps.

Before submission to the Commission, deliverables pass through a defined validation process: agreed quality guidelines and checklists; WP drafting by senior experts supported by teams; internal peer review within the WP; and holistic review by a senior QAB expert not involved in drafting. QAB assessment criteria include conceptual design and methodology, strength of evidence, correct and triangulated method use, participatory

quality of consultations, robustness of findings, usefulness and specificity of recommendations, internal coherence, and compliance with the Tender Specifications and proposal commitments. Study Team Leadership monitors timelines throughout. The intended result is that each deliverable is reviewed at least twice and receives English-language quality checks, with a clear process understood by all team members.

Continuous monitoring strengthens agility: monthly core team meetings institutionalise feedback loops among WP leads, QAB, and the Commission, while stakeholder feedback is captured and circulated systematically to ensure consistent integration across pillars. The intended result is an adaptive QC approach capable of accommodating Commission priorities and recalibrating where necessary.

External assurance is anchored by the QAB, designed as an independent standing layer of expertise providing both strategic and detailed review throughout the study. The QAB comprises senior specialists covering economics/modelling, data, investment, social and human rights, environment/energy, and English editing (supported by AI (Grammarly) where appropriate). Lessons learned from prior use of a QAB emphasise protecting review time through strict deadline discipline, running QAB improvements in parallel with Commission review, and communicating expectations early to secure reviewer availability and targeted input.

IV.4 Quality assurance on the work plan

Work plan quality is treated as both a methodological and governance issue, requiring structure, process discipline, and oversight. Structurally, the work plan will be grounded in a logical framework (objectives, outputs, activities, milestones), established and replicable SIA methods (including modelling, sectoral work, case studies, and consultations), and feasibility checks to ensure balance between timeline, resources, and scope.

Internally, QC aligns with the deliverable QC system and uses checklists mapped to the Tender Specifications (including sustainability pillars, stakeholder inclusivity, and gender/social dimensions). Externally, early stakeholder validation during the Inception Phase will be used to test the work plan and reduce blind spots, while QAB engagement and anticipation of Commission monitoring priorities will provide an additional layer of scrutiny.

Key work plan quality dimensions include contingency thinking (risk identification, mitigation planning, small contingency resource buffers), building an efficient team (core experts plus support staff, prior working relationships, strong study leadership, independent QAB), and maintaining adaptability to manage interdependencies and sequencing across pillars. Practical lessons learned inform scheduling realism - particularly regarding survey duration and translation needs, extended review timelines for ISSG processes, ensuring civil society has required the review windows before meetings, and using the kick-off meeting to refine priorities and resource allocation.

IV.5 Quality assurance on language quality and editorial consistency

Language quality is treated as a core QC requirement, given rising expectations for native-level English, minimal errors, and accessibility for non-experts. Four measures support this: selecting strong English writers (native or C2), structuring drafting so that a small group of core writers produces the main narrative while others provide concise inputs, implementing formal English editing by a senior native editor (with particular focus on executive summaries, conclusions, and recommendations), and explicitly checking for accessible language (reduced jargon, consistent abbreviations, active sentences, and simplified wording). Executive summaries will also be translated into German and French by designated team members to ensure quality in those languages.

Editorial consistency is managed from the outset through templates and shared standards rather than addressed only at the final stage. This includes a “format document” aligned with Commission guidelines (covering style rules, terminology choices, abbreviations, and drafting conventions), interview and reporting templates for consultation work, and survey design templates aligned with Commission practice. Editorial consistency also encompasses accessibility considerations for visually impaired readers.

IV.6 Quality assurance on continuity of service

Continuity planning addresses foreseeable disruptions such as staff unavailability, data gaps, and cyber incidents. Safeguards combine (i) robust project design - documented processes, modular WPs, identified dependencies (notably around modelling outputs), and schedule buffers; (ii) human resource redundancy - avoiding single points of failure, ensuring backups for critical tasks and leadership roles, handover protocols, and junior-senior pairing to preserve institutional knowledge; (iii) technical infrastructure - shared version-controlled repositories, automated backups with off-site copies, and standardised templates; and (iv) governance and monitoring - risk registers with owners, contingency plans, and regular Commission alignment.

A specific substitution plan is described for key roles (pillar leads, deputy project managers, and the project manager), with a commitment to inform the Commission and follow formal procedures should changes become permanent. Prior experience demonstrates that temporary illness-related absences were managed through rapid redistribution of tasks without delivery delays, albeit with some budgetary reallocation pressures.

IV.7 Risks and other quality assurance elements

The project faces both external and internal risks, which are tracked through dedicated risk registers. External risks include policy volatility (managed through the establishment of a policy cut-off point), geopolitical disruptions affecting baselines and logistics (mitigated through early baseline agreement and strong regional teams), civic-space constraints and access issues (addressed through duty-of-care protocols, anonymisation, consent, proxy channels, and diaspora outreach), macroeconomic and energy price volatility (managed through sensitivity bands and triangulation methods), reputational polarisation (mitigated through a transparent, evidence-based, and balanced approach, as well as anonymity where required), and residual pandemic-related risks (addressed through staff backups and digital-first outreach options).

Internal risks include potential limitations in the usefulness of CGE modelling (mitigated through early collaboration on specifications and the use of complementary methods), modelling pipeline bottlenecks (addressed through tight monitoring and staged “data gates”), parallel technical workload pressures (managed through strengthened coordination structures and budgeted coordination resources), requirements that are methodologically difficult to implement (addressed through early transparency and the proposal of alternative approaches), scope creep (managed through clear boundary-setting between Tender requirements and additional elements), weak returns from open public consultations (mitigated through targeted consultations and strengthened local promotion), project time-management risks from approval delays and iterative comments (addressed through realistic scheduling, clear processes, integrated comment handling, and limited review rounds), access-to-information constraints (managed through early identification of needs, use of multiple data sources, reliance on networks and institutional support, and qualitative fallbacks), conflicting review comments (addressed through a single integrated feedback channel), and continuity risks (mitigation through redundancy planning).

Additional implementation risks relate to stakeholder balance in digital seminars (addressed through structured invitations, advance circulation of materials, limited project presentations, inclusion of local speakers, and coordination with relevant institutions), the

infeasibility of quantifying individual NTMs (addressed through multi-method best estimates and stakeholder input), difficulty reaching vulnerable groups (mitigated through specialised expertise and tailored outreach strategies), challenges in bridging legal provisions to SME realities (addressed through targeted engagement and dedicated SME survey tools), evolving datasets (managed through data cut-off point), GDPR and information-security constraints (addressed through secure consent processes while pursuing available contacts), and language barriers in consultations and surveys (mitigated through multilingual surveys and multilingual interview and seminar delivery).

A final flexibility consideration is acknowledged regarding whether the eventual negotiating outcome takes the form of region-to-region agreement or bilateral arrangements.

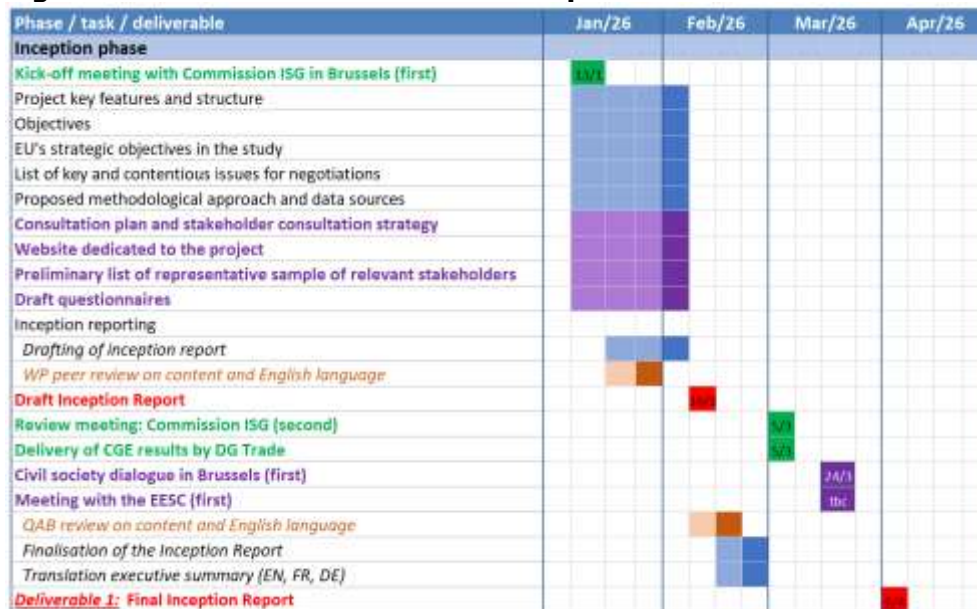
ANNEX VI: STUDY TIMELINE

The TS indicate the length of the study, divided into the three Phases:

- Inception Phase – with the Inception Report deadline: 1 month after the kick-off meeting;
- Interim Phase – with the Advanced Chapters Report deadline: 6-7 months after the signing of the contract;
- Final Phase – with the Draft Final Report deadline: 12 months after the signing of the contract;
- Final Phase – with the Final Report deadline: 15 months after the signing of the contract.

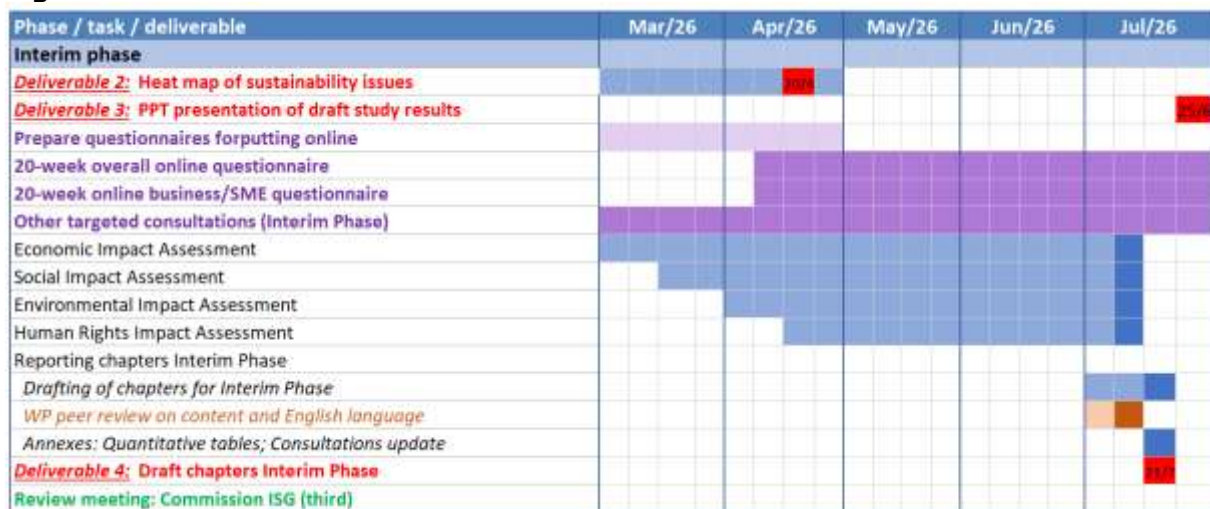
Based on these specifications, and linked to every part of the proposal, Figure VI.1 shows the detailed GANTT chart for the Inception Phase, Figure VI.2 for the Interim Phase, and Figure VI.3 for the Final Phase.

Figure VI.1: GANTT chart for the Inception Phase



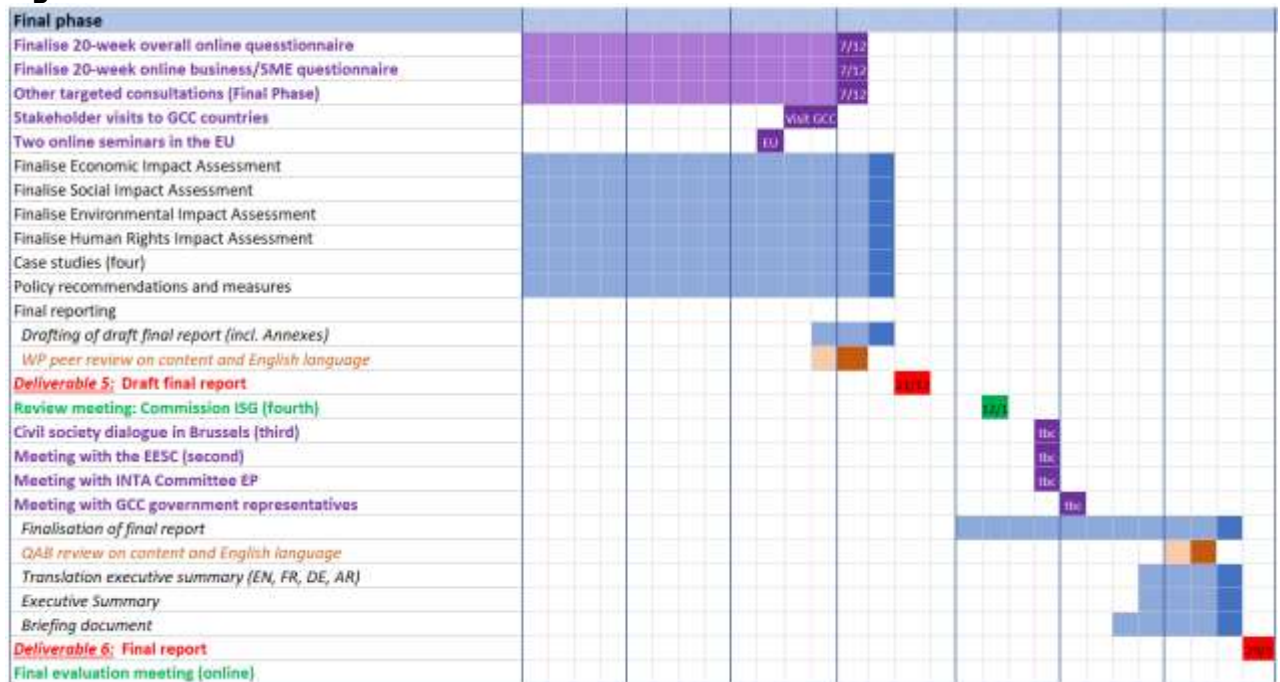
Source: own compilation based on Tender Specifications

Figure VI.2: GANTT chart for the Interim Phase



Source: own compilation based on Tender Specifications

Figure VI.3: GANTT chart for the Final Phase



Source: own compilation based on Tender Specifications

ANNEX VII: FINAL REPORT PROPOSED STRUCTURE

Executive Summary (EN, FR, DE, AR)

Introduction

1. Economic impact analysis
 - 1.1. Introduction and heat map
 - 1.2. Impact on trade in goods
 - 1.3. Impact on customs & trade facilitation
 - 1.4. Impact on trade in services
 - 1.5. Impact on Non-tariff Measures
 - 1.6. Impact on foreign direct investment and investment climates
 - 1.7. Global impact of the EU-GCC FTA/SPAs
 - 1.8. Impact on public procurement
 - 1.9. Impact on Small- and Medium-Sized Enterprises (SMEs)
 - 1.10. Impact for Türkiye
 - 1.11. Impact for the Wider Middle-East
 - 1.12. Impact for the EU Outermost Regions
 - 1.13. Impact for LDCs
2. Impact on EU Strategic objectives
3. Social impact analysis
 - 3.1. Introduction and heat map
 - 3.2. Impact on employment
 - 3.3. Impact on income (wages), poverty and vulnerable groups
 - 3.4. Impact on consumers and consumer rights
 - 3.5. Impact on the ILO Decent Work Agenda
 - 3.6. Impact on public policies and services: education and healthcare
 - 3.7. Impact on women and gender equality (and selected case study/studies)
4. Environmental impact analysis
 - 4.1. Introduction
 - 4.2. Finetune methodology and focus of analysis
 - 4.3. Baseline summaries of environmental impact areas
 - 4.4. Heatmap of environmental issues
 - 4.5. Impact on two key impact areas (and selected case study/studies)
5. Human rights impact analysis
 - 5.1. Introduction
 - 5.2. Baseline summary of current human rights situations
 - 5.3. Screening and scoping (heat map)
 - 5.4. Detailed analysis of selected human rights
 - 5.5. Impact on RBC/CSR
6. Consultation activities
 - 6.1. Introduction
 - 6.2. Summary of consultation activities
7. Policy recommendations and flanking measures
 - 7.1. Economic policy recommendations & flanking measures
 - 7.2. Social policy recommendations & flanking measures
 - 7.3. Environmental policy recommendations & flanking measures
 - 7.4. Human rights policy recommendations & flanking measures

ANNEX VIII: OPEN PUBLIC CONSULTATION QUESTIONNAIRE

Public Consultation on the Trade Sustainability Impact Assessment (SIA) in support of Free Trade Agreement (FTA) negotiations between the European Union and the Gulf Cooperation Council countries

Start questionnaire: 10 April 2026

A. INTRODUCTION

Context of Ongoing and Potential EU–GCC Trade and Economic Negotiations

In recent strategic discussions between the European Union and Gulf Cooperation Council (GCC) countries (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, the United Arab Emirates), both sides have reaffirmed their long-standing partnership and expressed a shared interest in deepening economic relations, including cross-regional trade and investment cooperation. The European Commission has been authorised by the Council to negotiate bilateral Strategic Partnership Agreements (SPAs) with each GCC state that can encompass trade, investment, and related regulatory cooperation. At the same time, a bilateral free trade agreement with the United Arab Emirates is underway, and future cooperation with other GCC countries could take the form of either bilateral negotiations or a broader regional pact.

About Sustainability Impact Assessments (SIAs)

SIAs analyse the potential economic, social, human rights, and environmental impacts of trade agreements being negotiated by the EU. They are based on a robust analysis of the changes that the trade agreement(s) would be likely to cause in the EU, in the partner country and in specified other countries. Equally important, they include wide-ranging consultations with stakeholders in the EU and the partner country. SIA findings and recommendations feed into the negotiations, helping negotiators to optimise the related policy choices.

The SIA in support of FTA negotiations between the EU and GCC countries is implemented by Trade Impact, a Netherlands-based consulting firm, in cooperation with Gulf Research Center Foundation Brussels and SQ Consult. More information about the SIA is available on a dedicated website. [LINK](#).

About this survey

The purpose of this public consultation is to gather stakeholder input to inform the Sustainability Impact Assessment (SIA). All interested citizens, organisations, and public authorities, irrespective of their geographic location, are invited to participate in this survey. The questionnaire is available in English, French, and German.

Please note that a separate questionnaire has been prepared specifically for businesses. Respondents completing the survey on behalf of a business, including small and medium-sized enterprises (SMEs), are invited to contribute via the dedicated business questionnaire, which is available in all official EU languages. Completion of the business questionnaire should take no more than 20 minutes.

Participants may also submit additional information, such as position papers or supporting documents, at the end of the questionnaire. The consultation will remain open until **7 December 2026**.

[Note: **Red text** indicates questions; black text response options.]

B. ABOUT YOU

B.1 Language of my contribution [drop-down list with all EU languages]

Bulgarian
Croatian [etc. the list continues over all EU languages]

B.2 I am giving my contribution as [drop-down list]

Academia/research institute
Business association
Company/business
Consumer organisation
Environmental organisation
EU citizen
Non-EU citizen
Non-governmental organisation (NGO)
Public authority
Trade union
Other

The Commission will publish all contributions to this public consultation. You can choose whether you would prefer to have your details published or to remain anonymous when your contribution is published. **For the purpose of transparency, the type of respondent (for example, 'business association, 'consumer association', 'EU citizen') country of origin, organisation name and size, and its transparency register number, are always published. Your e-mail address will never be published.** Opt in to select the privacy option that best suits you. Privacy options default based on the type of respondent selected You can choose whether you would Publication privacy settings.

B.3 Contribution publication privacy settings

Anonymous: The type of respondent that you responded to this consultation as, your country of origin and your contribution will be published as received. Your name will not be published. Please do not include any personal data in the contribution itself.

Public: Your name, the type of respondent that you responded to this consultation as, your country of origin and your contribution will be published.

B.4 Contribution publication privacy settings

Anonymous: Only organisation details are published: The type of respondent that you responded to this consultation as, the name of the organisation on whose behalf you reply as well as its transparency number, its size, its country of origin and your contribution will be published as received. Your name will not be published. Please do not include any personal data in the contribution itself if you want to remain anonymous.

Public: Organisation details and respondent details are published: The type of respondent that you responded to this consultation as, the name of the organisation on whose behalf you reply as well as its transparency number, its size, its country of origin and your contribution will be published. Your name will also be published.

I agree with the personal data protection provisions [\[LINK\]](#)

B.5 First name (anonymity requested)

B.6 First name (anonymity waived)

B.7 Surname (anonymity requested)

B.8 Surname (anonymity waived)

B.9 Email (this won't be published)

B.10 Scope [single choice, drop-down list]

International
Local >> B.10

National >> B.11

Regional >> B.11

B.11 Level of governance [single choice, drop-down list]

Local authority

Local agency

B.12 Level of governance [single choice, drop-down list]

Parliament

Authority

Agency

B.13 Organisation name

B.14 Organisation size [single choice, drop-down list]

Micro (1 to 9 employees)

Small (10 to 49 employees)

Medium (50 to 249 employees)

Large (250 or more)

B.15 Transparency register number

B.16 Age group

<15

15-29

30-65

>65

Prefer not to answer

B.17 Country of origin (single choice, drop-down list of all countries)

C. ABOUT YOU (ADDITIONAL QUESTIONS)

C.1 Please choose from among the options below the ones that best describe the area of interest of your organisation in the context of the EU-GCC FTA negotiations. [multiple choices possible]

Economic (agricultural productions, manufacturing, services, and investment, etc.)

Social (levels of employment, job quality, labour standards, poverty, inequality, informality, etc.)

Environment (greenhouse gas emissions, air quality, waste management, water quality, biodiversity, land use, etc.)

Human Rights (economic, social, cultural, civil and political human rights)

C.2 Are you a representative of a trade (business) association?

Yes >> go to CA.1

No >> go to D.1

CA.1 Which sector(s) does your association represent? [multiple choices possible, drop-down list]

Agriculture: wheat and grain production

Agriculture: rice production

Agriculture: fruit and vegetable production

Agriculture: other crops (incl. oilseeds, sugar)

Agriculture: livestock raising, meat production, and other animal products

Agriculture: dairy products

Other agriculture and food products

Forestry, wood, and wood products

Fishing and aquaculture

Mining and quarrying

Primary product production (oil, gas, coal)

Renewable energy production (solar, wind, water)

Beverages and tobacco

Leather, footwear, textiles, and garments

Chemical, plastics, and rubber products

Pharmaceuticals

Electrical equipment

Electronics

Machinery

Automotive and transport equipment

Other manufacturing

Utilities (gas, electricity, water supply, urban transport, railways, airports, and ports) services

Construction services

Trade, distribution and storage services

Transportation services
Information and communication services
Financial and insurance services
Business services (including professional services)
Other services

CA.2 What is the importance of GCC markets for your sector? [single choice]

Not important
Limited importance
Moderate importance
Significant importance
Strategic importance
I don't know

CA.3 What is the share of SMEs among your members? [single choice]

<10%
10-30%
30-60%
>60%
Not known

CA.4 What are the main barriers currently affecting trade between your sector and the GCC? [multiple choice possible]

Tariffs
Rules of origin
SPS measures
Technical standards / certification (TBT)
Local content requirements
Licensing / ownership restrictions
Government procurement restrictions
Customs procedures
Export restrictions
Data localisation / digital barriers
Intellectual property protection
No major barriers
Other >> to CA.5

CA.5 Please specify

CA.6 Overall, how restrictive are current market access conditions for your members? [single choice]

- Not restrictive
- Slightly restrictive
- Moderately restrictive
- Highly restrictive

CA.7 If EU-GCC trade agreements are concluded, what the expected impact would be on your sector's exports? [single choice]

- Strong decrease
- Moderate decrease
- No significant change
- Moderate increase
- Strong increase
- I don't know

CA.8 What is the expected impact on imports from the GCC? [single choice]

- Strong decrease
- Moderate decrease
- No significant change
- Moderate increase
- Strong increase
- I don't know

CA.9 What is the expected impact on investment flows? [single choice]

- Strong decrease
- Moderate decrease
- No significant change
- Moderate increase
- Strong increase
- I don't know

CA.10 Would the agreements likely improve supply chain resilience in your sector? [single choice]

- Yes, significantly
- Yes, moderately
- No effect

Increase dependency risks
I don't know

CA.11 Would regulatory cooperation (e.g. mutual recognition, standard alignment) significantly benefit your sector? [single choice]

Yes
No
Only in specific sub-sectors
I don't know
Not applicable

CA.12 Is government procurement access in GCC markets important for your sector? [single choice]

Yes, highly important
Somewhat important
Not important
Not applicable

CA.13 Could the agreements positively contribute to environmental sustainability in your sector? [single choice]

Yes
No
Neutral effect
Depends on final provisions
I don't know

CA.14 Could the agreements create risks of carbon leakage or environmental degradation? [single choice]

Yes
No
I don't know

CA.15 How do differences in climate policies and carbon costs affect your competitiveness when trading with the EU/GCC? [single choice]

Strongly positively
Somewhat positively
Neutral
Somewhat negatively
Strongly negatively
I don't know

CA.16 What barriers currently limit trade or investment in clean energy and climate-related sectors between the EU and GCC?

CA.17 Would the agreements affect labour or human rights conditions in your supply chains? [single choice]

- Strongly positively
- Somewhat positively
- Neutral
- Somewhat negatively
- Strongly negatively
- I don't know

CA.18 As a result of the EU-GCC agreements, would SMEs in your sector: [single choice]

- Benefit more than large firms
- Benefit equally
- Neutral
- Face greater adjustment costs
- Face administrative burdens
- I don't know

D. YOUR AWARENESS OF ONGOING EU-GCC TRADE AND TRADE-RELATED NEGOTIATIONS

D.1 Prior to this consultation, were you aware that the European Union and Gulf Cooperation Council (GCC) countries are engaged in, or considering, trade and trade-related negotiations (including bilateral free trade agreements, Strategic Partnership Agreements, or regional cooperation frameworks)? [single choice]

- Yes, and I am familiar with the main issues and objectives of these negotiations
- Yes, but I have limited knowledge of the main issues and objectives
- No, I was not aware of these negotiations

D.2 Which sources, if any, have provided you with information about EU-GCC trade and trade-related negotiations? [multiple choices possible]

- Information provided by EU/GCC institutions or government authorities (including trade, export or investment promotion agencies)
- Non-state organisations (e.g. business associations, civil society organisations, research institutes)
- Own research (e.g. academic research, market studies, policy analysis)
- Traditional media (e.g. television, radio, newspapers, magazines)
- Social media and online platforms

Professional and personal contacts

I have not received any information about these negotiations so far

E. YOUR VIEWS ON THE ECONOMIC EFFECTS OF THE EU-GCC TRADE AND TRADE-RELATED AGREEMENTS

E.1 Do you wish to answer questions on the **economic effects** of the trade and/or trade-related agreements currently being considered between the EU and GCC countries (including bilateral FTAs, Strategic Partnership Agreements, and/or regional frameworks)? [single choice]

- i) Yes => Go to E.2
- ii) No => Go to F.1

E.2 Overall, how do you think the trade and/or trade-related agreements currently under consideration may affect the economies of the EU and GCC countries (e.g. GDP, trade, growth, investment)?

	Strongly negatively	Somewhat negatively	No effect	Somewhat positively	Strongly positively	I don't know
In the EU						
In the GCC countries overall						
In Bahrain						
In Kuwait						
In Oman						
In Qatar						
In Saudi Arabia						
In the United Arab Emirates						

E.3 To what extent do you agree with the following statements regarding the potential economic effects of EU-GCC trade and trade-related agreements? *[Please note that the statements are phrased positively for survey purposes and do not reflect the views of the consultants]*

	Strongly disagree	Somewhat disagree	There will be no effect	Somewhat agree	Strongly agree	I don't know
Goods exports from GCC countries to the EU will increase						
Services exports from GCC countries to the EU will increase						
Goods exports from the EU to GCC countries will increase						
Services exports from the EU to GCC countries will increase						
The EU economy will benefit overall						
GCC economies will benefit overall						
EU investments in GCC countries will increase						

	Strongly disagree	Somewhat disagree	There will be no effect	Somewhat agree	Strongly agree	I don't know
GCC investments in the EU will increase						
EU companies will gain improved access to GCC markets						
GCC companies will gain improved access to EU markets						
Access to government/public procurement will improve						
Protection of EU investment in GCC will improve						
Protection of GCC investment in the EU will improve						
Transparency on regulatory frameworks will improve						
Transparency on regulatory aspects applicable in the EU (for GCC exporters) will improve						
More EU companies will be exporting to the GCC						
More GCC companies will be exporting to the EU						
New products (goods and services) will be exported from the EU to the GCC						
New products (goods and services) will be exported from the GCC to the EU						
Production costs will decrease in the EU due to cheaper inputs						
Production costs will decrease in the GCC due to cheaper inputs						
More EU firms will become involved in bilateral value/supply chains						
More GCC firms will become involved in bilateral value/supply chains						
EU firms will obtain better access to new technologies						
GCC firms will obtain better access to new technologies						
Government revenues in the EU and its Member States will increase thanks to the agreements currently under negotiation						
Government revenues in the GCC will increase thanks to the agreements currently under negotiation						
Small and medium-sized enterprises in the GCC will benefit						
Small and medium-sized enterprises in the EU will benefit						
Intellectual property rights (patents, trademarks, as well as geographical indications) will be better protected						
Governance will improve						

	Strongly disagree	Somewhat disagree	There will be no effect	Somewhat agree	Strongly agree	I don't know
Corruption will decrease						
Other	>> expand E.4)	>> expand E.4)		>> expand E.4)	>> expand E.4)	

E.4 What "other" effect(s) do you envisage?

E.5 Please identify up to three economic sectors most likely to be strongly affected by the EU-GCC trade agreements currently under consideration (NB: the sectors could be **broad**, such as agriculture, mining, tourism, etc., or **narrow**, such as dairy products, renewable energy, etc.).

	Name of sector	Where? (EU/GCC as a region/GCC country)	Negative or positive effect of the Agreements?	Why do you think the sector has been affected?
Sector 1				
Sector 2				
Sector 3				

E.6 What impact do you think the potential EU-GCC trade agreements will have on trade with the following third countries/regions (e.g. through trade diversion, changes in competitiveness, or supply-chain reconfiguration)?

	Strongly negative	Somewhat negative	No effect	Somewhat positive	Strongly positive	I don't know
UK						
Türkiye						
US						
Japan						
China						
South Korea						
India						
Rest of Asia						
Russia						
Wider Middle East (all Middle East except GCC and LDCs)						

	Strongly negative	Somewhat negative	No effect	Somewhat positive	Strongly positive	I don't know
Middle East LDCs (e.g. Yemen)						
Rest of high-income countries						
Rest of LDCs						

F. YOUR VIEWS ON THE SOCIAL EFFECTS OF THE POTENTIAL EU-GCC TRADE AGREEMENT(S)

F.1 Do you want to answer the questions on the **social effects** of the potential EU-GCC trade agreement(s)?

Yes => Go to F.2

No => Go to G.1

F.2 How do you think the potential agreement(s) will affect social development indicators **overall** in the EU and GCC countries (including gender equality, respect for labour standards (e.g. freedom of association or child labour), working conditions (job quality, e.g. wages, number of accidents, contracts and working hours), the informal sector and vulnerable groups (e.g. poverty levels)?

	Strongly negatively	Somewhat negatively	No effect	Somewhat positively	Strongly positively	I don't know
In the EU						
In GCC countries as a region						
In Bahrain						
In Kuwait						
In Oman						
In Qatar						
In Saudi Arabia						
In the United Arab Emirates						

F.3 The following table lists a number of socio-economic issues. How do you think these issues will be affected **in the EU**?

	Strongly negatively	Somewhat negatively	No effect	Somewhat positively	Strongly positively	I don't know
Overall social indicators						
Employment level in general, and in individual sectors						
Wages						
Poverty levels						
Income inequality						
Women's participation in the labour market and job opportunities in individual sectors						

	Strongly negatively	Somewhat negatively	No effect	Somewhat positively	Strongly positively	I don't know
Women's wages compared to wages received by men						
Working conditions offered to women						
Women's entrepreneurship						
Labour conditions and rights						
Quality of work (e.g., working hours, type and duration of contract)						
Child labour						
Forced labour						
Health and safety at work conditions						
Establishment and operation of trade unions, protection of workers' rights						
Responsible business conduct and corporate social responsibility						
Enforcement of labour rights						
Operation of labour inspection services						
Informal sector						
Employment levels in the informal sector						
Wages in the informal sector						
Transition from informal to formal employment						
Vulnerable groups						
Disabled people/employees and other vulnerable groups (e.g., youth)						
The rights and protection of migrant workers						
Consumer issues						
Prices of goods and services						
Quality and safety of goods and services						
Choice and availability of goods and services						
Provision of consumer information						
Protection of consumer rights (e.g., enforcement and redress mechanisms)						
Social protection and public policies						
Social protection (e.g., pensions, other benefits)						
Access to education						
Access to health care						

	Strongly negatively	Somewhat negatively	No effect	Somewhat positively	Strongly positively	I don't know
Other	>> expand F.4)	>> expand F.4)		>> expand F.4)	>> expand F.4)	

F.4 Please explain how the potential EU-GCC trade agreement(s) may lead to these effects. If you think that the agreements may lead to any other social impacts **in the EU**, please also explain here.

F.5 The following table lists a number of socio-economic issues. How do you think these issues will be affected **in GCC countries**?

	Strongly negatively	Somewhat negatively	No effect	Somewhat positively	Strongly positively	I don't know
Overall social indicators						
Employment level in general, and in individual sectors						
Wages						
Poverty levels						
Income inequality						
Women's participation in the labour market						
Women's entrepreneurship						
Labour conditions and rights						
Quality of work (e.g., working hours, type and duration of contract)						
Child labour						
Forced labour						
Health and safety at work						
Establishment and operation of trade unions, protection of workers' rights						
Responsible business conduct and corporate social responsibility						
Enforcement of labour rights						
Operation of labour inspection services						
Informal sector						
Employment levels in the informal sector						
Wages in the informal sector						
Transition from informal to formal employment						

	Strongly negatively	Somewhat negatively	No effect	Somewhat positively	Strongly positively	I don't know
Vulnerable groups						
Disabled people/employees and other vulnerable groups (e.g., youth)						
The rights and protection of migrant workers						
Consumer issues						
Prices of goods and services						
Quality and safety of goods and services						
Choice and availability of goods and services						
Provision of consumer information						
Protection of consumer rights (e.g., enforcement and redress mechanisms)						
Social protection and public policies						
Social protection (e.g., pensions, other benefits)						
Access to education						
Access to health care						
Other	>> expand F.6)	>> expand F.6)		>> expand F.6)	>> expand F.6)	

F.6 Please explain how the potential EU-GCC agreement(s) may lead to these effects. If you think that the agreements may lead to any other social impacts **in the GCC region or specific GCC countries**, please also explain here.

F.7 Which three social groups do you think will be most affected by the potential trade or trade-related agreement(s) between the EU and GCC countries? [NB: social groups could be **broad**, such as women, youth, consumers, etc., or **narrow**, such as informal workers in rural areas, etc.]

	Group 1	Positive or Negative effect	Group 2	Positive or negative effect	Group 3	Positive or negative effect
In the EU						
In GCC region						
In Bahrain						
In Kuwait						
In Oman						
In Qatar						

In Saudi Arabia						
In the United Arab Emirates						

E.8 Please elaborate.

G. YOUR VIEWS ON THE ENVIRONMENTAL EFFECTS OF THE POTENTIAL EU-GCC TRADE AGREEMENT(S)

G.1 Do you want to answer the questions on the environmental effects of the potential EU-GCC trade agreement(s)?

Yes => Go to F.2

No => Go to G.1

G.2 How do you think the potential agreement(s) will affect the environment **overall** in the EU and GCC countries?

	Strongly negatively	Somewhat negatively	No effect	Somewhat positively	Strongly positively	I don't know
In the EU						
In the GCC region						
In Bahrain						
In Kuwait						
In Oman						
In Qatar						
In Saudi Arabia						
In the United Arab Emirates						

G.3 The following table lists a number of environmental factors. How do you think these factors will be affected **in the EU**?

	Strongly negatively	Somewhat negatively	No effect	Somewhat positively	Strongly positively	I don't know
Greenhouse gas emissions						
Transport and the use of energy						
Air quality						
Land use (including soil, livestock, agricultural fertilizers)						
Biodiversity						
Water quality and resources						
Waste and waste management						
Ecosystems services and protected areas						

	Strongly negatively	Somewhat negatively	No effect	Somewhat positively	Strongly positively	I don't know
Use of renewable energy						
Natural resource exploitation (including fisheries, and forest resources)						
Circular economy processes and activities						
Other	>> expand G.4)	>> expand G.4)		>> expand G.4)	>> expand G.4)	

G.4 Please explain how the potential EU-GCC agreement(s) may lead to these effects. If you think that the agreements may lead to any other environmental effects **in the EU**, please also explain here.

G.5 Which three environmental indicators **in the EU** do you think will be most affected?

Most affected: [dropdown list of the environmental indicators listed in the matrix above] [choice: positive/negative]

2nd most affected: [dropdown list of the environmental indicators listed in the matrix above)] [choice: positive/negative]

3rd most affected: [dropdown list of the environmental indicators listed in the matrix above)] [choice: positive/negative]

G.6 The following table lists a number of environmental factors. How do you think these factors will be affected **in GCC countries**?

	Strongly negatively	Somewhat negatively	No effect	Somewhat positively	Strongly positively	I don't know
Greenhouse gas emissions						
Transport and the use of energy						
Air quality						
Land use (including soil, livestock, agricultural fertilizers)						
Biodiversity						
Water quality and resources						
Waste and waste management						
Ecosystems services and protected areas						
Use of renewable energy						
Natural resource exploitation (including fisheries, and forest resources)						
Circular economy processes and activities						

Other	>> expand G.7)	>> expand G.7)		>> expand G.7)	>> expand G.7)	
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G.7 Please explain how (through what mechanism) the Agreements may lead to these effects. If you think that the agreements may lead to any other social impacts **in the GCC region or specific GCC countries**, please also explain here.

G.8 Which three environmental indicators **in GCC countries** do you think will be most affected?

Most affected: [dropdown list of the environmental indicators listed in the matrix above] [choice: positive/negative]

2nd most affected: [dropdown list of the environmental indicators listed in the matrix above)] [choice: positive/negative]

3rd most affected: [dropdown list of the environmental indicators listed in the matrix above)] [choice: positive/negative]

G.9 Please elaborate.

H. YOUR VIEWS ON THE HUMAN RIGHTS EFFECTS OF THE POTENTIAL EU-GCC TRADE AGREEMENT(S)

H.1 Do you want to answer the questions on the **human rights effects** of the potential EU-GCC agreement(s)?

Yes => Go to G.2

No => Go to H.1

H.2 How do you think the EU-GCC countries agreement(s) currently under negotiation will affect the enjoyment of human rights **overall** (e.g. civil and political rights, right to just and favourable conditions of work, right to join and form trade unions, freedom of association, land rights, right to food, women's rights, child labour, rights of minorities, etc.)?

	Strongly negatively	Somewhat negatively	No effect	Somewhat positively	Strongly positively	I don't know
In the EU						
In the GCC region						
In Bahrain						
In Kuwait						
In Oman						
In Qatar						
In Saudi Arabia						
In the United Arab Emirates						

H.3 The following table lists a number of human rights. How do you think these rights will be affected **in the EU?**

	Strongly negatively	Somewhat negatively	No effect	Somewhat positively	Strongly positively	I don't know
Right to work (Art. 6 ICESCR)						
Right to enjoyment of just and favourable conditions of work (Art. 7 ICESCR)						
Right to form trade unions (Art. 8 ICESCR)						
Right to strike (Art. 8 ICESCR)						
Right to social security, including social insurance (Art. 9 ICESCR)						
Right to an adequate standard of living (Art. 11 ICESCR) [Including such rights as right to food (Art. 11 ICESCR, CESCR General Comment No. 12), clothing and housing and continuous improvement of living conditions (see Art. 11 ICESCR)]						
Right to the enjoyment of the highest attainable standard of physical and mental health (Art. 12 ICESCR) [Including right to water and sanitation (CESCR General Comment No. 15)]						
Right to education (Art. 14 ICESCR)						
Right to take part in cultural life (Art. 15 ICESCR)						
Right to privacy (Art. 12 UDHR, Art. 17 ICCPR)						
Right to property (Art. 17 UDHR)						
Right to protection of intellectual property (Art. 15 ICESCR, Art.27 UDHR)						
Right to information (Art. 19 UDHR)						
Right to participate in the conduct of public affairs (Art. 25 ICCPR, Art. 21 UDHR, Art. 8 ICESCR)						
Right of equal access to public services (Art. 25 ICCPR, CCPR General Comment No.25)						
Right to freedom of assembly and association (Art. 21 ICCPR, Art. 22 ICCPR)						

	Strongly negatively	Somewhat negatively	No effect	Somewhat positively	Strongly positively	I don't know
Rights of persons with disabilities (Convention on the Rights of Persons with Disabilities and its Optional Protocol)						
LGBTI rights (Art. 2 ICESCR, Art. 2 ICCPR)						
Women's rights (Art. 2 and 3 ICCPR, Art. 2 and 3 ICESCR, International Convention on Elimination of All Forms of Discrimination Against Women)						
Children's rights (Art. 25 and 26 UDHR, Art. 10 and 12 ICESCR, Art. 23 and 24 ICCPR, ILO Conventions No. 138 and No. 182, Convention on the Rights of the Child and its Optional Protocols)						
Other	>> expand H.4)	>> expand H.4)		>> expand H.4)	>> expand H.4)	

H.4 Please explain how (through what mechanism) the agreements may lead to these effects. If you think that the agreements may lead to any other human rights effects **in the EU**, please also explain here.

H.5 Which three human rights do you think will be most affected by the Agreements **in the EU**?

Most affected: [dropdown list of the HR listed in the matrix above] [choice: positive/negative]

2nd most affected: [dropdown list of the HR listed in the matrix above]] [choice: positive/negative]

3rd most affected: [dropdown list of the HR listed in the matrix above]] [choice: positive/negative]

H.6 The following table lists a number of human rights. How do you think these rights will be affected **in the GCC countries** because of the FTA(s)?

	Strongly negatively	Somewhat negatively	No effect	Somewhat positively	Strongly positively	I don't know
Right to work (Art. 6 ICESCR)						
Right to enjoyment of just and favourable conditions of work (Art. 7 ICESCR)						
Right to form trade unions (Art. 8 ICESCR)						
Right to strike (Art. 8 ICESCR)						

	Strongly negatively	Somewhat negatively	No effect	Somewhat positively	Strongly positively	I don't know
Right to social security, including social insurance (Art. 9 ICESCR)						
Right to an adequate standard of living (Art. 11 ICESCR) [Including such rights as right to food (Art. 11 ICESCR, CESCR General Comment No. 12), clothing and housing and continuous improvement of living conditions (see Art. 11 ICESCR)]						
Right to the enjoyment of the highest attainable standard of physical and mental health (Art. 12 ICESCR) [Including right to water and sanitation (CESCR General Comment No. 15)]						
Right to education (Art. 14 ICESCR)						
Right to take part in cultural life (Art. 15 ICESCR)						
Right to privacy (Art. 12 UDHR, Art. 17 ICCPR)						
Right to property (Art. 17 UDHR)						
Right to protection of intellectual property (Art. 15 ICESCR, Art.27 UDHR)						
Right to information (Art. 19 UDHR)						
Right to participate in the conduct of public affairs (Art. 25 ICCPR, Art. 21 UDHR, Art. 8 ICESCR)						
Right of equal access to public services (Art. 25 ICCPR, CCPR General Comment No.25)						
Right to freedom of assembly and association (Art. 21 ICCPR, Art. 22 ICCPR)						
Rights of persons with disabilities (Convention on the Rights of Persons with Disabilities and its Optional Protocol)						
LGBTI rights (Art. 2 ICESCR, Art. 2 ICCPR)						
Women's rights (Art. 2 and 3 ICCPR, Art. 2 and 3 ICESCR, International Convention on Elimination of All Forms of Discrimination Against Women)						
Children's rights (Art. 25 and 26 UDHR, Art. 10 and 12 ICESCR, Art. 23 and 24 ICCPR, ILO Conventions)						

	Strongly negatively	Somewhat negatively	No effect	Somewhat positively	Strongly positively	I don't know
No. 138 and No. 182, Convention on the Rights of the Child and its Optional Protocols)						
Other	>> expand H.7)	>> expand H.7)		>> expand H.7)	>> expand H.7)	

H.7 Please explain how (through what mechanism) the Agreements may lead to these effects. If you think that the Agreements may lead to any other human rights effects **in the GCC region or specific GCC countries**, please also explain here.

H.8 Which three human rights do you think will be most affected by the Agreements **in the GCC countries**?

Most affected: [dropdown list of the HR listed in the matrix above] [choice: positive/negative]

2nd most affected: [dropdown list of the HR listed in the matrix above] [choice: positive/negative]

3rd most affected: [dropdown list of the HR listed in the matrix above] [choice: positive/negative]

I. YOUR VIEWS ON NEGOTIATION TOPICS

I.1 Which of the issues listed below should be addressed in the negotiations for the EU-GCC trade agreement(s)?

	Very low priority	Low priority	Neutral	High priority	Very high priority	I don't know
For the EU-GCC trade agreement(s) negotiations:						
Further tariff reduction						
Removal of tariff rate quotas for agricultural goods						
Less strict and / or simpler rules of origin, particularly for SMEs						
More transparent and less burdensome customs procedures						
Improving access to government procurement						
Improved protection of intellectual property rights (including geographical indications)						
Liberalisation of trade and services						
Regulatory convergence (e.g., TBT, SPS)						
Use of international standards in the regulatory area						
Rules on anti-corruption and bribery						
Rules on competition/anticompetitive practices						
Stronger rules on labour and social standards						

Stronger rules for environmental protection						
Safeguards to avoid locking in carbon-intensive infrastructure or stranded assets						
Improving access to energy and raw materials						
Strengthened mechanism for dispute settlement						
Liberalisation of bilateral investment						
Improved investment protection						
Other (=> expand I.2)						

I.2 Which other issues should be addressed in the negotiations? Name as many as you consider important

I.3 What, in your view, should be the key issues in the negotiations for the EU-GCC countries free trade agreement(s)?

J. CONCLUDING QUESTIONS

I.1 Overall, what do you think will be the effect of the EU-GCC countries Free Trade Agreement(s)?

	Very adverse/ negative	very Adverse/ negative	No effect	Favourable/ positive	Very favourable/ very positive	I don't know
For the EU						
For Bahrain						
For Kuwait						
For Oman						
For Qatar						
For Saudi Arabia						
For the United Arab Emirates						
For GCC region as a whole						

I.3 Please elaborate.

I.4 What is your biggest fear when you think about the EU-GCC countries free trade agreement(s)?

I.5 What is your greatest hope when you think about the EU-GCC countries free trade agreement(s)?

I.6 Are there any other comments you would like to make?

I.7 If you would like to upload any documents, such as position papers on EU-GCC trade relations, please do so here. [\[LINK\]](#)

Many thanks!

ANNEX IX: BUSINESS/SME QUESTIONNAIRE

Business/MSME survey on the Trade Sustainability Impact Assessment (SIA) in support of Free Trade Agreement (FTA) negotiations between the European Union and the Gulf Cooperation Council countries

Start questionnaire: 10 April 2026

I. INTRODUCTION

Context of Ongoing and Potential EU–GCC Trade and Economic Negotiations

In recent strategic discussions between the European Union and Gulf Cooperation Council (GCC) countries (Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, the United Arab Emirates), both sides have reaffirmed their long-standing partnership and expressed a shared interest in deepening economic relations, including cross-regional trade and investment cooperation. The European Commission has been authorised by the Council to negotiate bilateral Strategic Partnership Agreements (SPAs) with each GCC state that can encompass trade, investment, and related regulatory cooperation. At the same time, a bilateral free trade agreement with the United Arab Emirates is underway, and future cooperation with other GCC countries could take the form of either bilateral negotiations or a broader regional pact.

About Sustainability Impact Assessments (SIAs)

SIAs analyse the potential economic, social, human rights, and environmental impacts of trade agreements being negotiated by the EU. They are based on a robust analysis of the changes that the trade agreement(s) would be likely to cause in the EU, in the partner country and in specified other countries. Equally important, they include wide-ranging consultations with stakeholders in the EU and the partner country. SIA findings and recommendations feed into the negotiations, helping negotiators to optimise the related policy choices.

The SIA in support of FTA/SPA negotiations between the EU and GCC countries is implemented by Trade Impact, a Netherlands-based consulting firm, in cooperation with Gulf Research Center Foundation Brussels and SQ Consult. More information about the SIA is available on a dedicated website. [LINK](#).

About this survey

The purpose of this business/MSME survey is to gather stakeholder input to inform the Sustainability Impact Assessment (SIA). All interested citizens, organisations, and public authorities, irrespective of their geographic location, are invited to participate in this survey. The questionnaire is available in all official EU languages, and its completion should take no more than 20 minutes.

Participants may also submit additional information, such as position papers or supporting documents, at the end of the questionnaire. The consultation will remain open until **7 December 2026**.

[Note: **Red text** indicates questions; black text response options; path dependency of questions will be added in the online version]

J. ABOUT YOU

J.1 Language of my contribution [drop-down list with all EU languages]

Bulgarian

Croatian [etc. the list continues over all EU languages]

J.2 I am giving my contribution as [drop-down list]

Academia/research institute

Business association

Company/business

Consumer organisation

Environmental organisation

EU citizen

Non-EU citizen

Non-governmental organisation (NGO)

Public authority

Trade union

Other

The Commission will publish all contributions to this public consultation. You can choose whether you would prefer to have your details published or to remain anonymous when your contribution is published. **For the purpose of transparency, the type of respondent (for example, 'business association, 'consumer association', 'EU citizen') country of origin, organisation name and size, and its transparency register number, are always published. Your e-mail address will never be published.** Opt in to select the privacy option that best suits you. Privacy options default based on the type of respondent selected You can choose whether you would Publication privacy settings.

J.3 Contribution publication privacy settings

Anonymous: The type of respondent that you responded to this consultation as, your country of origin and your contribution will be published as received. Your name will not be published. Please do not include any personal data in the contribution itself.

Public: Your name, the type of respondent that you responded to this consultation as, your country of origin and your contribution will be published.

J.4 Contribution publication privacy settings

Anonymous: Only organisation details are published: The type of respondent that you responded to this consultation as, the name of the organisation on whose behalf you reply as well as its transparency number, its size, its country of origin and your contribution

will be published as received. Your name will not be published. Please do not include any personal data in the contribution itself if you want to remain anonymous.

Public: Organisation details and respondent details are published: The type of respondent that you responded to this consultation as, the name of the organisation on whose behalf you reply as well as its transparency number, its size, its country of origin and your contribution will be published. Your name will also be published.

I agree with the personal data protection provisions [\[LINK\]](#)

J.5 First name (anonymity requested)

J.6 First name (anonymity waived)

J.7 Surname (anonymity requested)

J.8 Surname (anonymity waived)

J.9 Email (this won't be published)

J.10 Scope [single choice, drop-down list]

International

Local >> B.10

National >> B.11

Regional >> B.11

J.11 Level of governance [single choice, drop-down list]

Local authority

Local agency

J.12 Level of governance [single choice, drop-down list]

Parliament

Authority
Agency

J.13 Organisation name

J.14 Organisation size [single choice, drop-down list]

- Micro (1 to 9 employees)
- Small (10 to 49 employees)
- Medium (50 to 249 employees)
- Large (250 or more)

J.15 Transparency register number

J.16 Age group

- <15
- 15-29
- 30-65
- >65
- Prefer not to answer

J.17 Country of origin (single choice, drop-down list of all countries)

K. ABOUT YOU (ADDITIONAL QUESTIONS)

K.1 Is your company women-owned (i.e. women own more than 50% of the company)? [single choice]

- Yes
- No

K.2 Is your company women-led (i.e. the top manager is a woman, or women have a majority among top management)? [single choice]

- Yes
- No

K.3 In which sector(s) do you operate? [multiple answers possible]

Agriculture: wheat and grain production

Agriculture: rice production
Agriculture: fruit and vegetable production
Agriculture: other crops (incl. oilseeds, sugar)
Agriculture: livestock raising, meat production, and other animal products
Agriculture: dairy products
Other agriculture and food products
Forestry, wood, and wood products
Fishing and aquaculture
Mining and quarrying
Primary product production (oil, gas, coal)
Renewable energy production (solar, wind, water)
Beverages and tobacco
Leather, footwear, textiles, and garments
Chemical, plastics, and rubber products
Pharmaceuticals
Electrical equipment
Electronics
Machinery
Automotive and transport equipment
Other manufacturing
Utilities (gas, electricity, water supply, urban transport, railways, airports, and ports) services
Construction services
Trade, distribution and storage services
Transportation services
Information and communication services
Financial and insurance services
Business services (including professional services)
Other services

K.4 Please choose from the options below the ones that best describe the area of interest of your organisation in the context of the EU-GCC FTA/SPA negotiations and the SIA study.

- Economic (agricultural production, manufacturing, services, investment, etc.)
- Social (levels of employment, job quality, labour standards, poverty, inequality, informality, etc.)
- Human Rights (economic, social, cultural, civil and political human rights)
- Environment (greenhouse gas emissions, waste management, water quality, biodiversity, land use, etc.)

K.5 Where is your company based? [single choice, drop-down]

GCC country => Expand to B.19-B.27 and B.36 – B.43

EU – [by member state, alphabetically] => Expand to B.10-B.18 and B.28 – B.35

Others [List of other countries, alphabetically]

C.6 Has your company been involved in international trade (i.e. exporting or importing across country borders) recently?

No (=> continue at B.44)

Yes, as an importer only (including sourcing of raw materials or other inputs) (=> expand B.11 – B.14)

Yes, as an exporter only (=> expand B.15-B.18)

Yes, as an importer and exporter (=> expand B.11 – B.18)

If yes, as importer

C.7 What is the approximate share of imports (from anywhere) in your total turnover? [single choice]

Less than 25%

25% to 50%

50% to 75%

75% or more

C.8 What is the approximate share of your imports that comes from the GCC countries? [single choice]

Less than 25%

25% to 50%

50% to 75%

75% or more

C.9 What are the three most important bottlenecks you face when importing from the GCC countries? [multiple answers possible]

Tariffs and border taxes in the EU

Technical and regulatory barriers (e.g. requirements in terms of standards, compliance, labelling, food safety, animal and plant health, other regulatory systems)

Paperwork related to imports (e.g. customs procedures, certificates of origin)

Logistics issues (e.g., availability of transport, delays)

High logistics / transport costs

Trade finance

Issues related to the supplier (e.g. quantities available, problems with product quality)

Other (=> expand B.14)

C.10 Please describe which "other" bottlenecks you face when importing from the GCC countries

If yes, as exporter

C.11 What is the approximate share of exports (to any country) in your total turnover? [single choice]

- Less than 25%
- 25% to 50%
- 50% to 75%
- 75% or more

C.12 What is the approximate share of your exports that goes to the GCC countries? [single choice]

- Less than 25%
- 25% to 50%
- 50% to 75%
- 75% or more

C.13 What are the three most important bottlenecks you face when exporting to the GCC countries? [multiple answers possible]

- Tariffs and border taxes in the GCC countries
- Technical and regulatory barriers (e.g. requirements in terms of standards, compliance, labelling, food safety, animal and plant health, other regulatory systems)
- Paperwork related to imports (e.g. customs procedures, certificates of origin)
- Logistics issues (e.g. availability of transport, delays)
- High logistics / transport costs
- Trade finance
- Issues related to the buyer (e.g. payment problems)
- Other (=> expand B.18)

C.14 Please describe which "other" bottlenecks you face when exporting to the GCC countries.

=> Go to B.28

If B.9 = i (GCC-based respondent) => Expand to B.19-B.27:

C.15 Has your company been involved in international trade (i.e. exporting or importing across national borders) recently? [single choice]

- No (=> continue at B.44)
- Yes, as an importer only (including sourcing of raw materials/ inputs) (=> expand B.20 – B.23)
- Yes, as an exporter only (=> expand B.24-B.27)
- Yes, as an importer and exporter (=> expand B.20 – B.27)

If yes, as importer

C.16 What is the approximate share of imports (from anywhere) in your total turnover? [single choice]

- Less than 25%
- 25% to 50%
- 50% to 75%
- 75% or more

C.17 What is the approximate share of your imports that comes from the EU? [single choice]

- Less than 25%
- 25% to 50%
- 50% to 75%
- 75% or more

C.18 What are the three most important bottlenecks you face when importing from the EU? [multiple answers possible]

- Tariffs and border taxes in the GCC
- Technical and regulatory barriers (e.g. requirements in terms of standards, compliance, labelling, food safety, animal and plant health, other regulatory systems)
- Paperwork related to imports (e.g. customs procedures, certificates of origin)
- Logistics issues (e.g. availability of transport, delays)
- High logistics / transport costs
- Trade finance
- Issues related to the supplier (e.g. quantities available, problems with product quality)
- Other (=> expand B.23)

C.19 Please describe which "other" bottlenecks you face when importing from the EU.

If yes, as exporter

C.20 What is the approximate share of exports (to any country) in your total turnover? [single choice]

- Less than 25%
- 25% to 50%
- 50% to 75%
- 75% or more

C.21 What is the approximate share of your exports that goes to the EU? [single choice]

- Less than 25%

25% to 50%
50% to 75%
75% or more

C.22 What are the three most important bottlenecks you face when exporting to the EU?

Tariffs and border taxes in the EU
Technical and regulatory issues (e.g. requirements in terms of standards, compliance, labelling, food safety, animal and plant health, other regulatory systems)
Paperwork related to imports (e.g. customs procedures, certificates of origin)
Logistics issues (e.g. availability of transport, delays)
High logistics / transport costs
Trade finance
Issues related to the buyer (e.g. payment problems)
Other (=> expand B.27)

C.23 Please describe which "other" bottlenecks you face or add description of the key difficulties you face when exporting to the EU.

=> Go to B.36

If B.9 = ii (EU-based respondent) => Expand to B.28-B.35:

C.24 Has your company made any international investments (i.e. investments across country borders) recently? [single choice]

No (=> continue at B.51)
Yes (=> expand B.29 - B.37)

C.25 For how many years have you been investing internationally? [single choice]

1-2 years
2-5 years
5-10 years
More than 10 years

C.26 What is the approximate share of investments in your total turnover? [single choice]

Less than 25%
25% to 50%
50% to 75%
75% or more

C.27 What is the approximate share of investments in the GCC countries in your total investments? [single choice]

- Less than 25%
- 25% to 50%
- 50% to 75%
- 75% or more

C.28 What are the three most important bottlenecks you face when investing in the GCC countries? [multiple answers possible]

- Unclear applicable legal/administrative regulations/procedures
- Length for obtaining necessary permissions or other administrative decisions
- Access to dispute resolution mechanisms, courts, ombudsman, etc.
- Multiple rules/regulations/clearances
- Other (=> expand B.33)

C.29 Please describe which "other" bottlenecks you face when investing in the GCC countries.

C.30 What are the key strengths of the GCC investment environment?

C.31 What are the main weaknesses of the GCC investment environment?

If B.9 = i (GCC-based respondent) => Expand to B.36-B.44:

C.32 Has your company made any international investments (i.e. investments across country borders) recently? [single choice]

- No (=> continue at B.44)
- Yes (=> expand B.37 - B.43)

C.33 For how many years have you been investing internationally? [single choice]

- 1-2 years
- 2-5 years
- 5-10 years
- More than 10 years

C.34 What is the approximate share of investments in your total turnover? [single choice]

- Less than 25%

- 25% to 50%
- 50% to 75%
- 75% or more

C.35 What is the approximate share of investments in the EU in your total investments? [single choice]

- Less than 25%
- 25% to 50%
- 50% to 75%
- 75% or more

C.36 What are the three most important bottlenecks you face when investing in the EU? [multiple answers possible]

- Unclear applicable legal/administrative regulations/procedures
- Length for obtaining necessary permissions or other administrative decisions
- Access to dispute resolution mechanisms, courts, ombudsman, etc.
- Multiple rules/regulations/clearances
- Other (=> expand B.41)

C.37 Please describe which "other" bottlenecks you face

C.38 What are the key strengths of the EU investment environment?

C.39 What are the main weaknesses of the EU investment environment?

=> Go to C.1

If not trading (exporting, or importing) internationally:

C.40 What are the main reasons why you have not traded internationally so far? [multiple answers possible]

- The domestic market is big enough for my company
- I don't have enough knowledge about requirements in other markets / sourcing in other markets
- It is difficult to access other markets
- The paperwork required to import/export is too burdensome
- My company does not meet the required international standards
- The cost of importing or exporting is too high
- I don't know

Other (=> expand B.45)

C.41 Please specify which "other" reasons have stopped you from engaging in international trade

C.42 Is your company potentially interested in trading internationally? [single choice]

Yes

No

If not investing internationally:

C.43 What are the main reasons why you have not made any international investments so far? [multiple answers possible]

The barriers for accessing the market are too high

The market size and/or the market opportunities are not sufficiently interesting enough for us

The administrative procedures and paperwork are too complicated and take too long

I don't know

Other (=> expand B.48)

C.44 Please specify which "other" reasons have stopped you from engaging in international trade

C.45 Is your company potentially interested in engaging in international investments? [single choice]

Yes

No

L. Effects of the currently negotiated Agreement(s) specifically on your company

L.1 In which way do you expect the EU-GCC FTA/SPA agreement(s) to affect your company specifically? [single choice]

Very positively

Somewhat positively

No impact

Somewhat negatively

Very negatively

L.2 Please describe which positive or negative effects from the FTA/SPAs you expect for your company

L.3 In which way do you expect the EU-GCC FTA/SPA agreement(s) to affect your company specifically? [single choice]

- Very positively
- Somewhat positively
- No impact
- Somewhat negatively
- Very negatively

L.4 Please describe which positive or negative effects from the EU-GCC agreement(s) you expect for your company

If EU-based respondent:

L.5 How do you think the Agreement(s) currently under negotiation between the EU and GCC will affect the following aspects of your company's operations or performance?

	Strongly decrease / worsen	Somewhat decrease / worsen	No change	Somewhat increase / improve	Strongly increase / improve	I don't know
i) Exports to the GCC countries						
ii) Imports from the GCC countries						
iii) Opportunities to invest in the GCC countries						
iv) Level of output (production)						
v) Competitive position in the market / sector						
vi) Foreign competition in the market / sector						
vii) Profitability						
viii) Employment						
ix) Production costs						
x) Access to raw materials						
xi) (Business) risk diversification						
xii) Integration in global value chains						
xiii) Access to technology/innovation capacity						
xiv) GCC investments in my company						
xv) Investments from my company in an GCC company						

If GCC-based respondent:

L.6 How do you think the Agreements currently under negotiation between the EU and the GCC will affect the following aspects of your company's operations or performance?

	Strongly decrease / worsen	Somewhat decrease / worsen	No change	Somewhat increase / improve	Strongly increase / improve	I don't know
i) Exports to the EU						
ii) Imports from the EU						
iii) Opportunities to invest in the EU						
iv) Level of output (production)						
v) Competitive position in the market / sector						
vi) Foreign competition in the market / sector						
vii) Profitability						
viii) Employment						
ix) Production costs						
x) Access to raw materials						
xi) (Business) risk diversification						
xii) Integration in global value chains						
xiii) Access to technology/innovation capacity						
xiv) EU investments in my company						
xv) Investments from my company in an EU company						

If respondent based in a 3rd country:

L.7 How do you think the Agreement(s) currently under negotiation between the EU and the GCC countries will affect the following aspects of your company's operations or performance?

	Strongly decrease / worsen	Somewhat decrease / worsen	No change	Somewhat increase / improve	Strongly increase / improve	I don't know
i) Exports to the GCC countries						
ii) Imports from the GCC countries						
iii) Exports to the EU						
iv) Imports from the EU						
v) Opportunities to invest in the EU						
vi) Opportunities to invest in the GCC countries						
vii) Level of output (production)						
viii) Competitive position in the market / sector						
ix) Foreign competition in the market / sector						
x) Profitability						
xi) Employment						

	Strongly decrease / worsen	Somewhat decrease / worsen	No change	Somewhat increase / improve	Strongly increase / improve	I don't know
xii) Production costs						
xiii) Access to raw materials						
xiv) (Business) risk diversification						
xv) Integration in global value chains						
xvi) Access to technology/innovation capacity						
xvii) GCC investments in my company						
xviii) EU investments in my company						
xix) Investments from my company in an GCC company						
xx) Investments from my company in an EU company						

L.8 Please explain how (through what mechanism) you anticipate that the Agreement(s) currently under negotiation may lead to these effects. If you think that the Agreement(s) will have any other impacts on your business, please also describe them here.

M. Effect of the Agreement(s) on micro, small and medium-sized enterprises (MSMEs) generally

If EU-based respondent:

M.1 How do you think the EU-GCC FTA/SPAs currently under negotiation will affect micro, small and medium-sized enterprises (MSMEs) in the EU? [Please note that the formulation of the following statements does not necessarily reflect the views of the study team]

	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Strongly agree	I don't know
i) EU MSMEs will export more to the GCC countries						
ii) EU MSMEs will import more from the GCC countries						
iii) EU MSMEs will face more competition from GCC imported goods or services						
iv) EU MSMEs will have better chances to plug into global value chains (or bilateral value chains)						
v) EU MSMEs will benefit more from the Agreement(s) than large companies						
vi) More EU MSMEs will start to export						
vii) EU MSMEs will gain more access to new technologies						
viii) The business environment for EU MSMEs will improve						
ix) The administrative requirements for trading under the FTA/SPAs will be less burdensome for EU MSMEs						

	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Strongly agree	I don't know
x) EU MSMEs will invest more in the GCC countries						
xi) EU MSMEs will attract more investment from the GCC countries						
xii) The administrative requirements for investments under the IPA will be less burdensome for EU MSMEs						
xiii) Overall, EU MSMEs will benefit from the Agreement(s)						
xiv) Other (= > expand D.2)						

M.2 Which "other" effects for EU MSMEs do you expect?

M.3 Please explain how (through what mechanism) the Agreement(s) may lead to these effects. If you think that the Agreements can have any other effects for MSMEs **in the EU**, please also describe them here.

If GCC-based respondent:

M.4 How do you think the EU-GCC trade and investment Agreement(s) currently under negotiation will affect micro, small and medium-sized enterprises (MSMEs) **in the GCC**? [Please note that the formulation of the following statements does not necessarily reflect the views of the study team]

	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Strongly agree	I don't know
i) GCC MSMEs will export more to the EU						
ii) GCC MSMEs will import more from the EU						
iii) GCC MSMEs will face more competition from EU imported goods or services						
iv) GCC MSMEs will have better chances to plug into global value chains (or bilateral value chains)						
v) GCC MSMEs will benefit more from the Agreement(s) than large companies						
vi) More GCC MSMEs will start to export						
vii) GCC MSMEs will gain more access to new technologies						
viii) The business environment for GCC MSMEs will improve						
ix) The administrative requirements for trading under the FTA/SPAs will be less burdensome for GCC MSMEs						
x) GCC MSMEs will invest more in the EU						

	Strongly disagree	Somewhat disagree	Neutral	Somewhat agree	Strongly agree	I don't know
xi) GCC MSMEs will attract more investment from the EU						
xii) The administrative requirements for investments under the Agreement(s) will be less burdensome for GCC MSMEs						
xiii) Overall, GCC MSMEs will benefit from the Agreement(s)						
xiv) Other (=> expand D.5)						

M.5 Which "other" effects for EU MSMEs do you expect?

M.6 Please explain how the Agreement(s) may lead to these effects. If you think that the Agreement(s) can have any other effects for MSMEs **in the GCC**, please also describe them here.

M.7 Do you have any recommendations on how the Agreement(s) can better support MSMEs?

N. Social, human rights and environmental issues related to the EU-GCC Agreement(s)

Regarding Responsible Business Conduct / Corporate Social Responsibility

N.1 Does your company have any policies specifically related to Responsible Business Conduct (RBC)/ Corporate Social Responsibility (CSR)?

Yes => Expand to E.2 – E.7

No => Go to E.8

I don't know => Go to F.1

N.2 Do you have a formal policy statement which sets out the commitment of your business to meeting its RBC/CSR standards?

Yes

No

N.3 Is the policy publicly available?

Yes

No

N.4 Do you perform RBC/CSR "due diligence"? [N.B. RBC/CSR due diligence is an ongoing process to identify, prevent, mitigate and account for negative impacts which your business may cause or contribute to through its own activities; or which may be directly linked to your business's products, operations or services by a business relationship.]

Yes
No

N.5 Do you produce formal public reports on a periodic basis (for example, an RBC/CSR report, or integrated financial and non-financial reporting) to account for how your business identifies and addresses its potential or actual adverse impact?

Yes
No

N.6 Have there been any reported incidences of adverse company impacts caused by your business operations in the EU or the GCC?

Yes, in the EU but not in the GCC (=> expand E.7)
Yes, in the GCC but not in the EU (=> expand E.7)
Yes, in the EU and in the GCC (=> expand E.7)
No

N.7 Please describe briefly

Regarding human rights

N.8 Does your company have any policies specifically related to human rights?

Yes => Go to E.9
No => Go to E.17
I don't know => Go to F.1

E.8 Do you think that the EU-GCC Agreement(s) currently under negotiation will affect your company policy on human rights?

Yes
No

E.9 Do you have a formal policy statement which sets out the commitment of your business to meeting its responsibility to respect human rights?

Yes
No

E.10 Is the policy publicly available?

Yes
No

E.11 Do you perform human rights "due diligence"? [N.B. human rights due diligence is an ongoing process to identify, prevent, mitigate and account for negative human rights impacts which your business may cause or contribute to through its own activities; or which may be directly linked to your business's products, operations or services by a business relationship.]

Yes
No

E.12 Do you produce formal public reports on a periodic basis (for example, as part of RBC/CSR reports, or of integrated financial and non-financial reporting) to account for how your business identifies and addresses its potential or actual adverse human rights impact?

Yes
No

E.13 Does your business have processes in place for the effective remedy of adverse human rights impacts which your business has caused or contributed towards through its operations?

Yes
No

E.14 Have there been any reported incidences of adverse human rights impacts caused by your business operations in the EU or the GCC?

Yes, in the EU but not in the GCC (=> expand E.16)
Yes, in the GCC but not in the EU (=> expand E.16)
Yes, in the EU and in the GCC (=> expand E.16)
No

E.15 Please describe briefly

E.16 Do you think that the EU-GCC Agreement(s) currently under negotiation will affect your company policy on human rights?

Yes
No

Regarding Employment and labour standards policy

E.17 Does your company have any policies specifically related to employment and labour standards?

Yes => Go to E.19
No => Go to E.27
I don't know => Go to F.1

E.18 Do you think that the EU-GCC Agreement(s) currently under negotiation will affect your company policy on employment and labour standards?

Yes
No

E.19 Do you have a formal policy statement which sets out the commitment of your business to meeting its responsibility to respect labour rights?

Yes
No

E.20 Is the policy publicly available?

Yes
No

E.21 Do you perform labour rights “due diligence”? [N.B. labour rights due diligence is an ongoing process to identify, prevent, mitigate and account for negative labour rights impacts which your business may cause or contribute to through its own activities; or which may be directly linked to your business’s products, operations or services by a business relationship.]

Yes
No

E.22 Do you produce formal public reports on a periodic basis (for example, as part of RBC/CSR reports, or of integrated financial and non-financial reporting) to account for how your business identifies and addresses its potential or actual adverse labour rights impact?

Yes
No

E.23 Does your business have processes in place for the effective remedy of adverse labour rights impacts which your business has caused or contributed towards through its operations?

Yes
No

E.24 Have there been any reported incidences of adverse labour rights impacts caused by your business operations in the EU or the GCC countries?

Yes, in the EU but not in the GCC (=> expand E.26)
Yes, in the GCC but not in the EU (=> expand E.26)
Yes, in the EU and in the GCC (=> expand E.26)
No

E.25 Please describe briefly

E.26 Do you think that the EU-GCC Agreement(s) currently under negotiation will affect your company policy on employment and labour standards?

Yes
No

Regarding environmental policy

E.27 Does your company have any policies specifically related to environmental policy?

Yes => Go to E.29
No => Go to E.37
I don't know => Go to F.1

Regarding Environmental policy

E.28 Do you think that the EU-GCC Agreement(s) currently under negotiation will affect your company environmental policy?

Yes
No

E.29 Do you have a formal policy statement which sets out the commitment of your business to meeting its responsibility to respect environmental standards?

Yes
No

E.30 Is the policy publicly available?

Yes
No

E.31 Do you perform environmental "due diligence"? [N.B. environmental due diligence is an ongoing process to identify, prevent, mitigate and account for negative environmental impacts which your business may cause or contribute to through its own activities; or which may be directly linked to your business's products, operations or services by a business relationship.]

Yes
No

E.32 Do you produce formal public reports on a periodic basis (for example, as part of RBC/CSR reports, or of integrated financial and non-financial reporting) to account for how your business identifies and addresses its potential or actual adverse environmental impact?

Yes
No

E.33 Does your business have processes in place for the effective remedy of adverse environmental impacts which your business has caused or contributed towards through its operations?

Yes

No

E.34 Have there been any reported incidences of adverse environmental impacts caused by your business operations in the EU or the GCC?

No

Yes, in the EU but not in the GCC countries (=> expand E.36)

Yes, in the GCC countries but not in the EU (=> expand E.36)

Yes, in the EU and in the GCC countries (=> expand E.36)

E.35 Please describe briefly

E.36 Do you think that the EU-GCC Agreement(s) currently under negotiation will affect your company environmental policy?

Yes

No

E.37 What barriers currently limit trade or investment in clean energy and climate-related sectors between the EU and GCC?

E.38 How do differences in climate policies and carbon costs affect your competitiveness when trading with the EU/GCC?

F. Concluding Questions

F.1 Overall, what are the most positive aspects of the EU-GCC Agreement(s) currently under negotiation that you expect for your company?

F.2 Overall, what are the most negative aspects of the Agreement(s) currently under negotiation that you expect for your company?

F.3 Overall, what are the most positive aspects of the Agreement(s) currently under negotiation that you expect for businesses in your country generally?

F.4 Overall, what are the most negative aspects of the Agreement(s) currently under negotiation that you expect for businesses in your country generally?

F.5 Are there any other comments you would like to make on EU-GCC trade or on the Agreement(s) currently under negotiation?

F.6 Do you want to receive the Newsletter to stay up-to-date on progress of the EU-GCC Trade SIA study? Please leave your email address here:

F.7 If you would like to upload any documents, such as position papers on the EU-GCC trade relations, please do so here. [\[LINK\]](#)

Many thanks!

ANNEX X: REFERENCES

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