Ex-post evaluation of the EU-SADC Economic Partnership Agreement

Interim Report

11 December 2023

Prepared by BKP Economic Advisors

EUROPEAN COMMISSION

Directorate-General for Trade
Directorate C — Africa, Caribbean and Pacific, Asia (II), Trade and Sustainable Development, Green Deal
Unit C1 – African, Caribbean and Pacific, Overseas Countries and Territories

European Commission
B-1049 Brussels

Ex-post evaluation of the EU-SADC Economic Partnership Agreement

Interim Report

11 December 2023

Europe Direct is a service to help you find answers to your questions about the European Union.

Freephone number (*)**:**

00 800 6 7 8 9 10 11

(*) The information given is free, as are most calls (though some operators, phone boxes or hotels may charge you).

Luxembourg: Publications Office of the European Union, 2023

ABSTRACT

The EU-SADC Economic Partnership Agreement (EPA) is a development-oriented free trade agreement between the European Union (EU) and six Parties of the Southern African Development Community (SADC): Botswana, Eswatini, Lesotho, Mozambique, Namibia, and South Africa. It has been provisionally applied since October 2016, except for Mozambique, for which provisional application started in February 2018.

To inform the European Commission's own evaluation of the implementation of the EPA to date and its impact, as well as to feed into a joint review by the Parties to the Agreement, the European Commission has contracted an independent contractor, a consortium led by BKP Economic Advisors, to prepare an external evaluation study. The evaluation is undertaken over the period March 2023 to April 2024 and will analyse the economic, social, environmental, and human rights (including labour rights) effects of the EPA in the territories of the Parties since its provisional application. In terms of evaluation criteria, it will review the effectiveness, efficiency, coherence, relevance, and impact of the EPA. It will also comprise a number of case studies to illustrate or add detail to broader findings.

This interim report presents preliminary findings of the evaluation team based on the analysis and consultations undertaken during the first half of the evaluation. Data collection and analysis as well as consultations are ongoing, and accordingly the findings as presented here are subject to revision in the (draft) final evaluation report.

TABLE OF CONTENTS

LIST OF BOXES, TABLES AND FIGURES

ACRONYMS

AAAQ	Availability, Accessibility, Acceptability and Quality
ACHPR	African Charter on Human and Peoples' Rights
ACP	African, Caribbean and Pacific
AfCFTA	African Continental Free Trade Area
AMIE	Association of Meat Importers and Exporters
AU	African Union
BLMNS	Botswana, Lesotho, Mozambique, Namibia, Swaziland/Eswatini
BLNS	Botswana, Lesotho, Namibia, Swaziland/Eswatini
CBD	Convention on Biological Diversity
CEDAW	Convention on the Elimination of all forms of Discrimination against Women
CESCR	Committee on Economic, Social and Cultural Rights
CFR	Charter of Fundamental Rights
CGE	Computable General Equilibrium
CITES	Convention on International Trade in Endangered Species of Wild Fauna and Flora
CRC	Convention on the Rights of the Child
CSD	Civil Society Dialogue
CSR	Corporate Social Responsibility
DALRRD	Department of Agriculture, Land Reform and Rural Development
DFQF	Duty-Free and Quota-Free
DG	Directorate-General
DTIC	Department of Trade, Industry and Competition
EBA	Everything But Arms
EC	European Commission
EPA	Economic Partnership Agreement
EQ	Evaluation Question
EU	European Union
FAO	Food and Agriculture Organization
FCPF	Forest Carbon Partnership Facility
FDI	Foreign Direct Investment
FIP	Finance and Investment Protocol
FTA	Free Trade Agreement
GDP	Gross Domestic Product
GHG	Greenhouse Gas
GIs	Geographical Indications
GSP	Generalised Scheme of Preferences
GTAP	Global Trade Analysis Project
HFCs	Hydrofluorocarbons
HS	Harmonised System
ICCPR	International Covenant on Civil and Political Rights
ICERD	International Convention on the Elimination of all forms of Racial Discrimination
ICESCR	International Covenant on Economic, Social and Cultural Rights
ILO	International Labour Organization
INIP	Fisheries Inspection Institute
INNOQ	Institute for Standards and Quality
ITAC	International Trade Administration Commission
LDC	Least Developed Country
LHWP	Lesotho High Water Project
LULUCF	Land Use, Land-Use Change and Forestry
MEAs	Multilateral Environmental Agreements
MFN	Most-Favoured Nation
MRLs	Maximum Residue Limits
MSME	Micro, Small, or Medium-sized Enterprise
NDC	Nationally Determined Contribution
NGO	Non-Governmental Organisation
NSBAP	National Biodiversity Strategy and Action Plan
NTM	Non-Tariff Measure
OACPS	Organisation of African, Caribbean and Pacific States
ODS	Ozone-Depleting Substances
OECD	Organisation for Economic Cooperation and Development
OHCHR	Office of the United Nations High Commissioner for Human Rights
OPC	Online Public Consultation
PM	Particulate Matter
POPs	Persistent Organic Pollutants
PPDF	Project Preparation Development Facility
PPS	Price Preference System
RASFF	Rapid Alert System for Food and Feed
RBC	Responsible Business Conduct
REIS	Regional Economic Integration Support
REX	Registered Exporter
SACU	Southern African Customs Union
SADC	Southern African Development Community
SAM	Social Accounting Matrix
SAPA	South African Poultry Association
SARS	South African Revenue Service
SDGs	Sustainable Development Goals
SPS	Sanitary and Phytosanitary
TBT	Technical Barriers to Trade
TDC	Trade and Development Committee
TDCA	Trade, Development and Cooperation Agreement
TDI	Trade Defence Instrument
TFA	Trade Facilitation Agreement
ToR	Terms of Reference
TRF	Trade-Related Facility
TRQ	Tariff Rate Quota
TSD	Trade and Sustainable Development
UDHR	Universal Declaration on Human Rights
UK	United Kingdom
UN	United Nations
UNCTAD	United Nations Conference on Trade and Development
UNDRIP	United Nations Declaration on the Rights of Indigenous Peoples
UNIDO	United Nations Industrial Development Organisation
VAT	Value-Added Tax
WTO	World Trade Organisation

1 INTRODUCTION

The EU-SADC Economic Partnership Agreement (EPA) is a development-oriented free trade agreement (FTA) between the European Union (EU) and six Parties of the Southern African Development Community (SADC): Botswana, Eswatini, Lesotho, Mozambique, Namibia and South Africa.[1] It was signed on 10 June 2016 and has been provisionally applied since October 2016, except for Mozambique, for which provisional application started in February 2018.

The EPA provides asymmetric goods market access to the Parties: The EU provides duty-free and quota-free (DFQF) market access for all goods (except arms and ammunition) to all SADC EPA States except South Africa, which receives such treatment for 94.4% of its exports (in terms of tariff lines), with another 3.2% benefitting from partial liberalisation. The SADC EPA States except Mozambique – i.e. the members of the Southern African Customs Union (SACU) – gradually grant the EU DFQF treatment to 84.9% of tariff lines over a period of eight years, with an additional 12.9% benefitting from reduced tariffs or tariff rate quotas. As a Least Developed Country (LDC), Mozambique liberalises a smaller percentage of imports from the EU (74% in terms of trade volume) over ten years. The EPA also contains a Trade and Sustainable Development (TSD) Chapter which covers social and environmental matters.

After several years of implementation, an evaluation is undertaken with the **objective** of analysing the economic, social and environmental, and human rights (including labour rights)[2] impacts of the implementation of the EPA. The evaluation fits into the increased focus of the EU on the implementation and enforcement of FTAs, as well as the role of trade in promoting values of democracy, the rule of law, the defence of human rights, social and gender equity, and environmental protection and climate change action, all in a time of global crises and heightening geopolitical tensions.

The European Commission Directorate-General (DG) for Trade has awarded a contract for the "Ex-post evaluation of the EU-SADC Economic Partnership Agreement" to a consortium led by BKP Economic Advisors (BKP). The evaluation is carried out by a team involving experts from BKP in cooperation with European and African researchers. Work started in March 2023 and will continue over 14 months. The external evaluation study will support the European Commission's own evaluation of the Agreement as well as inform the joint review of the EPA by the Parties.

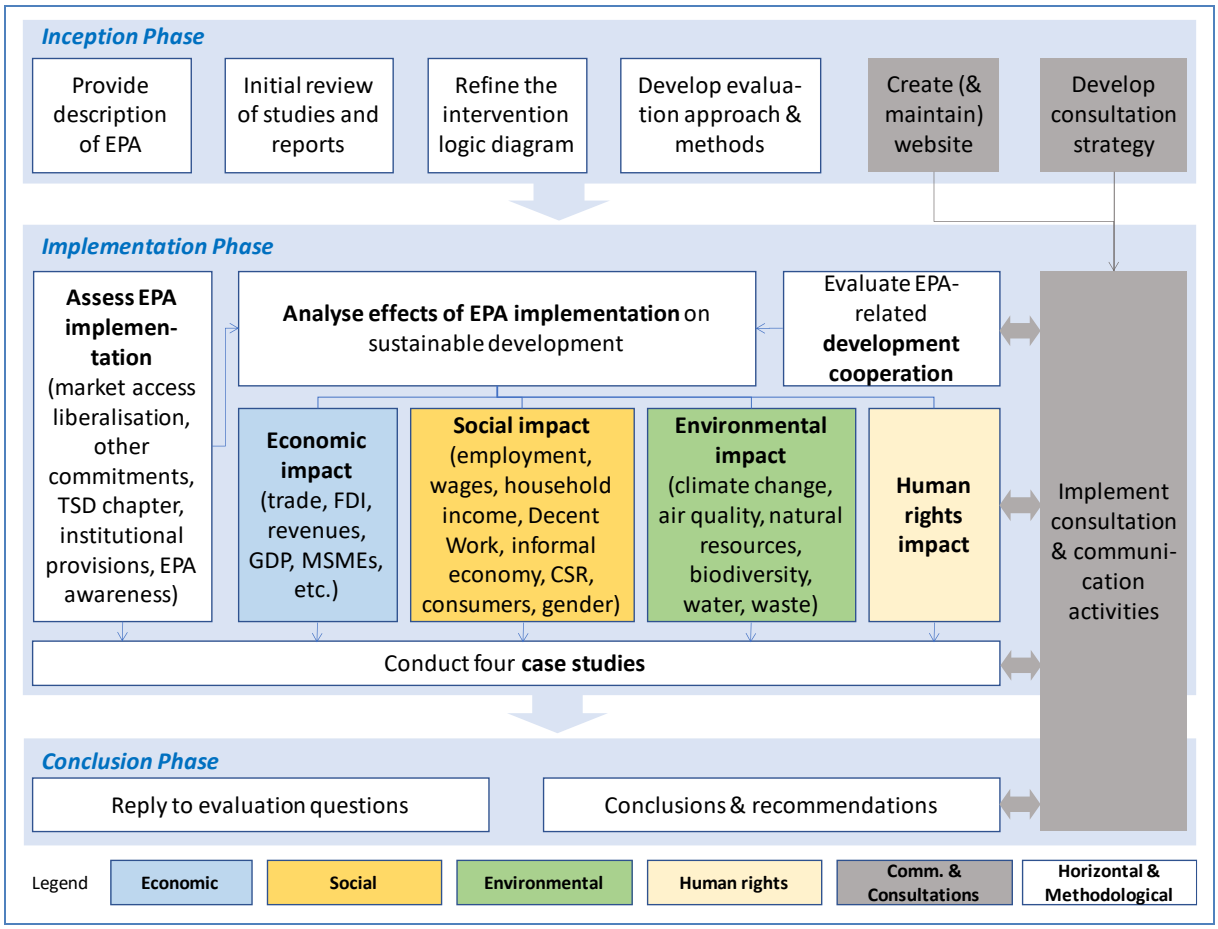
The **scope** of the evaluation can be delineated as follows: in terms of the *period covered*, it covers the whole implementation period of the Agreement since the start of provisional application in 2016, respectively 2018 (for Mozambique) up to now, also comparing, where appropriate with a pre-Agreement period of five years (i.e. starting in 2011). *Geographically*, it primarily covers the Parties to the Agreement,[3] although some global effects (e.g. climate change) will also be covered. With regard to the *evaluation criteria*, effectiveness, impact, efficiency, coherence and relevance will be considered. Finally, as already mentioned, in terms of *types of effects* considered, the evaluation will cover economic, social, environmental, and human rights (including labour rights) effects which the EPA may have had either as a result of the changes in trade it has brought about, or

[1] Text of EU-SADC EPA: https://trade.ec.europa.eu/doclib/docs/2015/october/tradoc_153915.pdf
[2] Whenever this report refers to human rights, this includes labour rights.
[3] The Agreement's impact is relatively more limited in the EU (simply due to the difference in economic size). On the EU side, the focus will be on the current 27 EU Member States.

through the implementation of the provisions of the EPA text itself, including the provisions in the TSD Chapter.

The evaluation **approach** comprises three broad phases (Figure 1): an inception phase; a main implementation phase comprising most of the evidence collection and analysis, and the conclusion phase.

Figure 1: Overall evaluation approach



This interim report provides a summary of the preliminary evaluation findings obtained from the analyses undertaken since the start of the evaluation in March 2023. It is structured as follows: Chapter 2 provides a descriptive summary of the EU-SADC EPA and its implementation so far, followed in Chapter 3 by a summary of the evaluation methodology. Chapters 4 to 9 in Part B present the state of analysis and preliminary findings with regard to the implementation of the EPA (Chapter 4), its economic (Chapter 5), social (Chapter 6), environmental (Chapter 7), and human rights effects (Chapter 8), as well as the results of EPA-related development cooperation (Chapter 9). Chapter 10 provides an update on the evaluation schedule and work plan, addressing in particular the case studies, consultations and planning for the workshops. The appendices provide further details on findings and methodological aspects for certain elements of the report.

The next report to be delivered is the draft final report, scheduled for February 2024.

Caveat: The analysis is preliminary and subject to revision. It will be further developed in the remainder of the evaluation.

PART A: CONTEXT

2 DESCRIPTION OF THE EU-SADC EPA

The EU–SADC EPA is a development-focused trade agreement founded on the principles of the Cotonou Agreement. Its Parties are the EU and its 27 Members on the one hand, and the six SADC EPA States – the members of the Southern African Customs Union (SACU) Botswana, Eswatini, Lesotho, Namibia, and South Africa, as well as Mozambique – on the other. Negotiations on the EPA started in 2004, and the Agreement was signed on 10 June 2016, the first EPA that the EU concluded with an African region.

Pending ratification of the EPA by all EU Member States,[4] the Agreement has been provisionally applied since 10 October 2016 between the EU and the SACU Members (Botswana, Eswatini, Lesotho, Namibia, and South Africa), and since 04 February 2018 between the EU and Mozambique. Prior to the EPA, the EU's trade with the partner countries took place under different regimes (Box 1)

In July 2022 the Joint Council agreed to Angola's request made in February 2020 to start accession negotiations,[5] but negotiations have not yet been launched. Angola had originally been part of the EPA negotiations but then decided not to initially sign.

Box 1: EU-SADC EPA State trade regimes prior to the EPA

The trade regimes regulating trade between the EU and the six partner countries that were in place before the EPA varied across partners and trade direction:

- The EU and South Africa traded, since 2000, under the bilateral Trade, Development and Cooperation Agreement (TDCA), which had provided for the liberalisation of 95% of the EU's imports from South Africa within 10 years, and 86% of South Africa's imports from the EU in 12 years[6]
- EU-Botswana, EU-Eswatini and EU-Namibia: As ACP countries that had initialled EPAs with the EU, exports from Botswana, Eswatini and Namibia to the EU since 2008 benefitted from preferential DFQF access to the EU except for arms.[7] EU exports to Botswana, Eswatini and Namibia would legally have received MFN

---

4 As of September 2023, the EPA has been ratified by 12 EU Member States (Croatia, Czech Republic, Estonia, Finland, Greece, Hungary, Latvia, Lithuania, Luxembourg, Portugal, Romania, and Spain); see https://www.consilium.europa.eu/en/documents-publications/treaties-agreements/agreement/?id=2016020

5 Decision No 2/2022 of the Joint Council established under the Economic Partnership Agreement between the European Union and its Member States, of the one part, and the SADC EPA States, of the other part of 26 July 2022 on the request from Angola pursuant to Article 119(1) of the EPA.

6 A summary of the TDCA as well as the full agreement is available at https://eur-lex.europa.eu/EN/legal-content/summary/trade-development-and-cooperation-agreement-tdca-with-south-africa.html

7 *Council Regulation (EC) No 1528/2007 of 20 December 2007 applying the arrangements for products originating in certain states which are part of the African, Caribbean and Pacific (ACP) Group of States provided for in agreements establishing, or leading to the establishment of, Economic Partnership Agreements (OJ L 348, 31.12.2007, p. 1)*. This preferential treatment would have ended for the three countries (and others) on 01 October 2014 due to the absence of efforts made towards the ratification of the EPA, according to *Regulation (EU) No 527/2013 of the European Parliament and of the Council of 21 May 2013 amending Council Regulation (EC) No 1528/2007 as regards the exclusion of a number of countries from the list of regions or states which have concluded negotiations (OJ L 165, 18.6.2013, p. 59)*, and instead Botswana, Eswatini and Namibia would have entered the standard GSP on 01 October 2014, which provides more limited EU market access preferences (see *Commission Delegated Regulation (EU) No 1016/2014 of 22 July 2014 amending Annex II to Regulation (EU) No 978/2012 of the European Parliament and of the Council applying a scheme of generalised tariff preferences (OJ L 283, 27.9.2014, p. 23)*). However, because negotiations on the EU-SADC EPA were concluded on 15 July 2014, the ACP preferential trade regime for the three countries was extended until the start of application of the EPA in October 2016; see *Commission Delegated Regulation (EU) No 1025/2014 of 25 July 2014 amending Annex I to Council Regulation (EC) No 1528/2007 applying the arrangements for products originating in certain states which are part of the African, Caribbean and Pacific (ACP) Group of States provided for in agreements establishing, or leading to the establishment of, Economic Partnership Agreements, as amended by Regulation (EU) No 38/2014 of the European Parliament and of the Council amending certain regulations relating to the common commercial policy as regards the granting of delegated and implementing powers for the adoption of certain measures (OJ L 281, 30.9.2014, p. 1)*, and *Regulation (EU) 2016/1076 of the European Parliament and of the Council of 8 June 2016 applying the arrangements for products originating in certain states which are part of the African, Caribbean and Pacific*

treatment. However, as a result of the SACU CET applying the TDCA, Botswana, Eswatini and Namibia in practice granted the TDCA preferences to the EU.
- EU-Lesotho: As a least developed country, Lesotho's exports to the EU benefitted (and continue to do so) from the EBA. For EU exports to Lesotho the same situation as in Botswana, Eswatini and Namibia applied.
- EU-Mozambique trade: As a least developed country, Mozambique's exports to the EU benefitted (and continue to do so) from the EBA. Conversely, EU exports to Mozambique received MFN treatment.

2.1 Structure and Contents of the EPA

The EPA consists of the main text of the Agreement, arranged in 122 articles over six parts with various chapters, along with six annexes; protocols on the origin of goods, administrative assistance in customs matters, geographical indications, on the relationship between the EPA and the pre-existing Trade, Development and Cooperation Agreement (TDCA) between South Africa and the EU; and the tariff schedules of the EU, SACU and Mozambique.

Part I. Consistent with the EPA's emphasis on sustainable development and its objectives to improve living standards and contribute to poverty reduction and eradication, Part I is dedicated to sustainable development and other areas of cooperation. **Chapter I** (Articles 1-5) sets out the objectives and principles of the EPA, highlighting its contribution to sustainable development and reaffirming the importance of regional integration, as well as establishes the principles for monitoring the implementation and impact of the EPA, and for cooperation of the Parties.

In the **TSD Chapter** (**Chapter II**, Articles 6-11), the Parties:

- reaffirm their commitments to promote the development of international trade in such a way as to contribute to the objective of sustainable development in its three pillars (economic development, social development, and environmental protection) for the welfare of present and future generations, and strive to ensure that this objective is integrated and reflected at every level of their trade relationship;
- reaffirm their commitments from Articles 1, 2 and 9 of the Cotonou Agreement (i.e. support framework facilitating development of African, Caribbean and Pacific (ACP) states, their integration into the world economy, economic growth, private sector development, job creation, and sustainable management of natural resources, respect for human rights and fundamental freedoms, good governance and the rule of law, respect for international obligations and the will to include into the dialogue other stakeholders, such as private sector and civil society organisations), especially the general commitment to reducing and eventually eradicating poverty in a way that is consistent with the objectives of sustainable development;
- recognise the value of multilateral environmental governance and agreements and reaffirm their commitment to implement the multilateral environmental agreements (MEAs) that they have ratified;
- reaffirm their rights and their commitment to implement their obligations in respect of the International Labour Organization (ILO) conventions they have ratified;
- recognise the right of each Party to regulate, i.e., to establish its own levels of domestic environmental and labour protection, and to adopt or modify accordingly its relevant laws and policies, consistent with internationally recognised standards and agreements to which they are a Party;
- recognise that it is inappropriate to encourage trade or investment by weakening or reducing domestic levels of labour or environmental protection. Thus, a Party shall not derogate from, or persistently fail to effectively enforce, its environmental and labour laws;

(ACP) Group of States provided for in agreements establishing, or leading to the establishment of, economic partnership agreements (recast) (OJ L 185, 8.7.2016, p. 1).

- agree that dialogue and cooperation on trade and sustainable development may involve other relevant authorities and stakeholders;
- given that the Chapter does not establish a separate body to address TSD matters, the Parties agree that the dialogue and cooperation related to this chapter will take place through the Trade and Development Committee; and
- recognise the importance of working together, including in the following areas: trade aspects of labour and environmental policies, such as MEAs and the ILO Decent Work Agenda in international fora, trade aspects related to biodiversity, sustainable management of forests and sustainable fishing practices, impact of the agreement on sustainable development, corporate social responsibility (CSR), and accountability.

Despite the relatively broad coverage of the EPA's TSD Chapter, the scope of binding commitments, institutional provisions, and provisions on dialogue with civil society are limited when compared with other EU trade agreements.[8]

The last chapter in Part I of the EPA (**Chapter III**, Articles 12-19) addresses **areas of cooperation**, including development cooperation, defines the cooperation priorities – SADC EPA States' capacity to trade, supply-side competitiveness, business-enhancing infrastructure, trade in services, trade-related issues, trade statistics, and institutional capacity building, as well as fiscal adjustment to address reduced tariff revenues. Intellectual property rights, public procurement, competition, and tax governance are other areas of cooperation, each addressed in separate articles.

The EPA was originally intended as a comprehensive agreement that would have covered trade in goods, trade in services, investment, as well as new generation issues such as intellectual property rights, competition and public procurement. However, the outcome of the negotiations resulted in an agreement focussing on trade in goods, with new generation issues only included in the EPA cooperation framework, being non-binding (Parshotam 2021, 98).[9] The EPA also includes rendez-vous clauses on the future negotiation of agreements in these new generation areas.

Part II. Goods trade liberalisation and related issues are addressed in Part II of the Agreement. The EPA provides for asymmetrical **market access liberalisation** (**Chapter I**, Articles 20-31):

- The EU has provided DFQF access to all exports (except arms and ammunition) of SADC EPA countries except South Africa (i.e. Botswana, Eswatini, Lesotho, Mozambique and Namibia – the BLMNS countries) since the first day of the EPA's application. For South African exports to the EU, 94.4% of tariff lines are DFQF under the EPA, with another 3.2% benefitting from partial tariff preferences. Certain South African products, such as cut flowers, skimmed milk powder, frozen orange juice and bottled wine, benefit from tariff rate quotas (TRQs), whereby a certain volume of products can be exported to the EU either without duty or at reduced rates (Annex I to the EPA). Although EU preferences offered to South Africa under the EPA are more limited than for the other SADC EPA States, they are more extensive than under the TDCA (see below).
- The SADC EPA countries progressively liberalise the access of EU products to their markets based on tariff phase-out schedules: upon completion of the transition period (of up to eight years, ending on 31 December 2024) the five member countries of SACU (Botswana, Eswatini, Lesotho, Namibia, and South Africa) grant DFQF to 84.9% of EU

[8] In 2016, several EU new generation FTAs were already in force with binding commitments of the Parties to ratify the remaining ILO fundamental conventions (EU-Korea, applied since 2011) and binding provisions regarding establishment of a separate TSD Committee and civil society advisory groups, as well as regular (annual) meetings between the Parties and between the Parties and civil society (EU-Colombia and Peru, applied since 2014, EU-Central America, applied since 2014, EU-Moldova, applied since 2014, EU-Georgia, applied since 2014 and EU-Korea, applied since 2011).

[9] Note that Part II, Chapter IX, does refer to trade in services and investment. However, it specifically provides that the Parties may negotiate agreements on these issues in the future (Arts. 73f).

exports (in terms of tariff lines) and partial tariff preferences for another 12.9% (Annex II to the EPA); however, the vast majority of goods covered by the EPA was liberalised immediately, also taking into account that most tariffs had already been gradually removed under the TDCA: only 55 tariff lines (0.7% of total tariff lines) were covered by the EPA's gradual phase-out. South Africa has also provided the EU with TRQs on a limited range of products, such as pork, butter, and cheese. Certain sensitive products such as motor vehicles for the transport of goods, and petroleum oils are excluded from liberalisation. Mozambique as an LDC provides more limited preferences (Annex III to the EPA): it removes customs duties on 74% of imports from the EU (in terms of trade volume), with a staging period of up to ten years, ending in 2028 (for the majority of covered products, the transition period was five years; for products with a 10-year transition period, the first cuts are foreseen in year 6, i.e. 2024, at the earliest).

The rules of origin which determine which goods qualify for the preferences granted under the EPA are set out in detail in Protocol 1 to the EPA.

As noted, the EPA substantively replaced the TDCA that South Africa previously had with the EU.[10] For South Africa, it extended duty-free access to additional products, including fisheries products and additional agricultural products such as sugar, ethanol, active yeast, white crystalline powder, citrus jams, skimmed milk powder, butter, canned mixtures of fruit (other than tropical fruit), frozen orange juice and wine. The EPA also improved commitments from the EU on certain TRQs, including for dairy products, flowers, canned fruit, fruit, and fruit juice. The BLMNS countries had traded with the EU under various trade regimes prior to the EPA (see Box 1 above).

By replacing the TDCA, the EPA also contributes to **improved regional integration**, since it has restored the common external tariff applied by SACU, which was not the case under the TDCA. It further contributes to regional integration as under the regional preference clause each SADC EPA State has agreed to extend any advantage granted to the EU to the other SADC EPA States, whereas intra-SADC EPA States preferences need not be extended to the EU (Art. 108). In addition, since the EPA is a reciprocal agreement, it now fully complies with the EU's World Trade Organisation (WTO) obligations.

Chapter II of Part II (Articles 32-38) deals with **trade defence instruments**. First, it provides that anti-dumping and countervailing investigations shall be conducted in terms of the relevant WTO provisions. Second, it provides for several different types of safeguard measures. Beside global safeguards under the WTO Agreement on Safeguards (Art. 33) – where the EU exempted SADC EPA States from WTO safeguards for a period of five years – and current payments-related safeguards (Art. 70, see below), there are bilateral, agricultural, food security, transitional and infant industry safeguards.

Chapters III (Articles 39f) and **IV** (Articles 41-50) contain detailed provisions on **non-tariff measures** and **customs and trade facilitation**. Chapter III limits the use of quantitative restrictions to those allowed in line with the relevant WTO agreements and establishes national treatment on internal taxes and regulations is. Chapter IV aims at reinforcing cooperation in the area of customs and trade facilitation, promoting the harmonisation of customs legislation, ensuring that legitimate customs policy objectives are not compromised, and providing support to the SADC EPA States' customs administration for the EPA's effective implementation. The Chapter is complemented by Protocol 2 to the EPA on mutual administrative assistance in customs matters.

[10] Protocol 4 to the EPA sets out the relationship between the EPA and the TDCA. The chapters on trade and trade-related issues (including the granted market access preferences under the TDCA) as well as the corresponding institutional and dispute settlement provisions in the TDCA will be repealed once the EPA has entered into force and are presently suspended during the EPA's provisional application.

Chapters V (Articles 51-58) and **VI** (Articles 59-67) contain provisions on cooperation on **technical barriers to trade** (TBTs) and **sanitary and phytosanitary (SPS) measures**, as well as the enhancement of SADC EPA States' technical capacity on these issues.

Chapter VII, which consists of only one article (Article 68), establishes the agricultural partnership to facilitate dialogue between the Parties on the important topic of **agriculture**, as well as prohibits the use of agricultural export subsidies.

Chapter VIII (Articles 69-71) addresses **current payments and capital movements**. It establishes the principle of on restrictions on current payments but foresees exceptions in line with the WTO rules in case of balance of payments problems, as well as establishes safeguards, of maximum six months, to address the exceptional circumstance where bilateral payments "cause or threaten to cause serious difficulties for the operation of monetary policy or exchange rate policy" (Art. 70).

Finally, **Chapter IX** (Articles 72-74) recognises the importance of **trade in services and investment**, reaffirms the Parties related commitments under the WTO, and foresees the potential future negotiation of agreements on trade in services and investment, as well as establishes principles for such negotiations.

Part III. Articles 75-96 of the EPA deal with **dispute avoidance and settlement**. Under Article 104 of the TDCA disputes were either settled through a decision by the Cooperation Council or arbitration. By contrast the EPA provides for three ways of dispute settlement: consultations, followed by either mediation or arbitration. Where mediation fails, the dispute may also be referred to arbitration (Article 79), with Articles 80 to 87 setting out procedural issues for arbitration.

Part IV. Articles 97-99 establish **general and security exceptions** to the Agreement, which cover the customary areas – public morals, protection of human, animal or plant life or health, gold and silver trade, prison labour, national treasures, conservation of exhaustible natural resources, and essential security interests. General exceptions also include, under certain conditions, "restrictions on exports of domestic materials necessary to ensure essential quantities of such materials to a domestic processing industry during periods when the domestic price of such materials is held below the world price as part of a governmental stabilisation plan" and measures "essential to the acquisition or distribution of products in general or local short supply" (Art. 97(i) and (j)).

Part V. The main **institutions under the EPA** are established in Articles 100-103. Notably, the highest body overseeing and implementing the EPA is the Joint SADC EPA States-EU Council (Joint Council), assisted by the Trade and Development Committee (TDC). Other institutions are established elsewhere in the Agreement: the Special Committee on Customs and Trade Facilitation in Article 50, the agricultural partnership in Article 68, and the Special Committee on GIs and Trade in Wines and Spirits in Article 13 of Protocol 3.

Part VI. The last Part of the EPA (Articles 104-122) contains miscellaneous **final provisions**, including principles for the exchange of information and transparency, relations with other agreements – the TDCA, the Cotonou Agreement and the WTO Agreements –, entry into force and duration, and accessions. It also contains the regional preference clause already addressed above.

The EPA includes a bilateral **Protocol between South Africa and the EU on the protection of geographical indications (GIs) and on trade in wines and spirits (Protocol 3)**. The Protocol has been provisionally applied since 1 November 2016 and is open for accession, in relation to GIs only, to Botswana, Eswatini, Lesotho, Namibia and Mozambique upon application to the Special Committee on GIs and trade in wines and spirits. This Committee – comprising EU and South Africa representatives – has been

established to ensure implementation of the Protocol including monitoring parties' cooperation, exchanging information, product specifications, and amend the Protocol. South Africa committed to protect 251 GIs of the EU,[11] and the EU protects 105 GIs of South Africa,[12] with an option to add 30 more GIs with priority for protection. These GIs are protected against any direct or indirect commercial use of the name, any misuse, imitation, or evocation, any other false or misleading indication as to the provenance, origin, nature, or essential qualities of a like product, and any other practice liable to mislead consumers as to the true origin of a like product. This means that South African producers of products labelled with GIs protected under the Protocol will have exclusive rights to use these names in the EU market. For example, no EU producer /distributor or any other entity will be allowed to use the name "Rooibos" for products not complying with the GI product specifications. The EPA also provides for the co-existence of some names like Feta, Sherry, and Valencia oranges, as long as the relevant provisions in Protocol 3 are respected. The Protocol's second part provides rules on winemaking practices and on documentation and certification requirements for trade in wines and spirits between the EU and South Africa.

2.2 Context of the Implementation of the EPA

Since the start of the provisional application of the EPA in 2016, a number of changes in the trade context have taken place, globally and for the Parties. Globally, the environment for trade has altered substantially by factors including trade conflicts, e.g. between the United States and China, the COVID-19 pandemic, as well as an increase in armed conflicts and wars, including Russia's war of aggression against Ukraine and the war between Hamas and Israel, all of which have led to a slowdown of globalisation. Challenges posed by the need to address trade's role in mitigating climate changes, as well as uncertainties about the international trade rules exemplified by the stalemate of WTO reform and an increasing level of violation of trade rules in the context of a return in many countries to activist industrial policies have also contributed to a generally more difficult global trading environment. These developments, as well as technological changes such as the increasing importance of digital trade, are important for the evaluation to keep in mind when assessing the impact (to the extent possible), coherence and relevance of the EPA. Major developments directly relevant for the Agreement are summarised in this section.

The **SADC EPA States** are also all parties to the SADC Trade Protocol which offers preferential access to imports from other SADC members. All SADC EPA countries also ratified the African Continental Free Trade Area (AfCFTA) Agreement.[13] Trading under the AfCFTA officially started on 01 January 2021, although so far the practical implementation is limited to the products and countries participating in the AfCFTA Guided Trade Initiative, in which none of the SADC EPA States participates. Some recent policies taken by some SADC EPA States have also affected trade and foreign investment, including export bans, local content/ownership requirements, and industrial policy measures aimed at substituting imports.

In the **EU**, on 16 June 2020, the European Commission launched a major review of EU trade policy aimed at determining its medium-term direction, responding to a variety of new global challenges and taking into account the lessons learned from the coronavirus crisis. The rationale for this review is the Commission's belief that a strong EU "needs a strong trade and investment policy to support economic recovery, create quality jobs,

[11] 105 agricultural products and foodstuffs (including mainly fruits, vegetables, cereals, cheeses, meat and fisheries products), five beers, 120 wines, and 21 spirits. Two of the GIs were from the UK. As a result of the UK's withdrawal from the EU, as from 1 January 2021, South Africa has no obligation under the EU-SADC EPA to protect them, since they do not meet anymore the condition of originating in the territory of the Parties.

[12] Three agricultural products and foodstuffs (Honeybush tea, Rooibos tea and Karoo lamb), and 102 wines.

[13] The last SADC EPA country to do so was Mozambique, on 30 December 2022, Resolução da Assembleia da República 19/2022 de 30 de Dezembro.

protect European companies from unfair practices at home and abroad, and ensure coherence with broader priorities in the areas of sustainability, climate change, the digital economy and security." The EU has also recently introduced a number of autonomous policies and measures that are relevant also for EU-SADC EPA country trade: These include tightened EU standards on pesticides and maximum residue limits (MRLs) that may have an impact on export opportunities of agricultural products under the EPA, and increasing scrutiny of companies' supply chains under strengthened corporate due diligence requirements may affect suppliers in SADC EPA States. Also, driven by the need, and obligation under the Paris Agreement, to address climate change, the European Green Deal[14] and the Fit for 55 package (notably the Carbon Border Adjustment Mechanism), as well as the Farm to Fork Strategy[15] and the recently passed deforestation regulation[16], may do the same for energy-intensive products. The United Kingdom's (UK's) withdrawal from the EU also altered the context for trade between the (remaining) Parties.

The implementation of and trading under the EPA has also faced a number of global challenges in recent years. The global economy was affected in 2020 by an unprecedented economic downturn largely driven by the COVID-19 pandemic. SADC EPA States were also impacted by the pandemic through reduced fiscal revenues – driven by the reduced economic activity and fluctuating commodity prices – and trade flows – driven by increased trade/border restrictions (SADC 2020). Even before, SADC economies were hit by slow economic growth and recessions in 2019: South Africa faced an economic recession, Namibia contracted by 1.9% and no other country surpassed Botswana's growth rate of 3.5%, partly due to natural disasters and unfavourable commodity cycles (European Commission 2020). The trade war between China and the United States and the slowdown of globalisation since the start of the EPA application generally provided an unfavourable environment for the implementation of the Agreement.

An additional risk for the EPA stems from the decision of some SADC EPA States to not sign to the successor of the EU-ACP Cotonou Agreement, which provides the legal framework for the EPA. The Cotonou Agreement was due to expire in February 2020, but given that the negotiations for its successor Agreement had not been concluded by that time (the text was initialled in April 2021), the application of the Cotonou Agreement was extended to cover the time needed for the post-Cotonou Agreement's signature and entry into force.[17] The post-Cotonou Samoa Agreement was finally signed on 15 November 2023 and will start to be provisionally applied as from 01 January 2024.[18] However, South Africa's decision to leave the Organisation of the ACP States (OACPS),[19] which also implies that it will not sign the Samoa Agreement, is an issue to be taken into consideration across all elements of the assessment.

---

[14] Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. The European Green Deal, COM/2019/640 final, 11 December 2019; for more information, see https://ec.europa.eu/info/strategy/priorities-2019-2024/european-green-deal_en.

[15] Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. A Farm to Fork Strategy for a fair, healthy and environmentally-friendly food system, COM(2020) 381 final, 20 May 2020; for more information and documents, see https://ec.europa.eu/food/farm2fork_en.

[16] Regulation (EU) 2023/1115 of the European Parliament and of the Council of 31 May 2023 on the making available on the Union market and the export from the Union of certain commodities and products associated with deforestation and forest degradation and repealing Regulation (EU) No 995/2010 (Text with EEA relevance), OJ L 150/206, 09.06.2023.

[17] https://international-partnerships.ec.europa.eu/policies/european-development-policy/acp-eu-partnership_en

[18] https://www.consilium.europa.eu/en/policies/samoa-agreement/. Botswana, Eswatini, Lesotho, Mozambique, and Namibia all signed the Samoa Agreement before the end of 2023.

[19] "The Cotonou Agreement and its future: a new era for EU-ACP relations", Eric Pichon/European Parliamentary Research Service, 14 June 2023, https://epthinktank.eu/2023/06/14/the-cotonou-agreement-and-its-future-a-new-era-for-eu-acp-relations/

3 EVALUATION METHODOLOGY

The methodology for the evaluation has been presented in detail in the inception report.[20] This chapter therefore only provides a brief summary focussing on the overall structure of the evaluation, i.e. the evaluation framework. This constitutes the main structuring instrument for the evaluation and explains how the evaluation will collect evidence, analyse it, derive overall conclusions about the implementation of the EPA and its effects, and formulate corresponding recommendations.

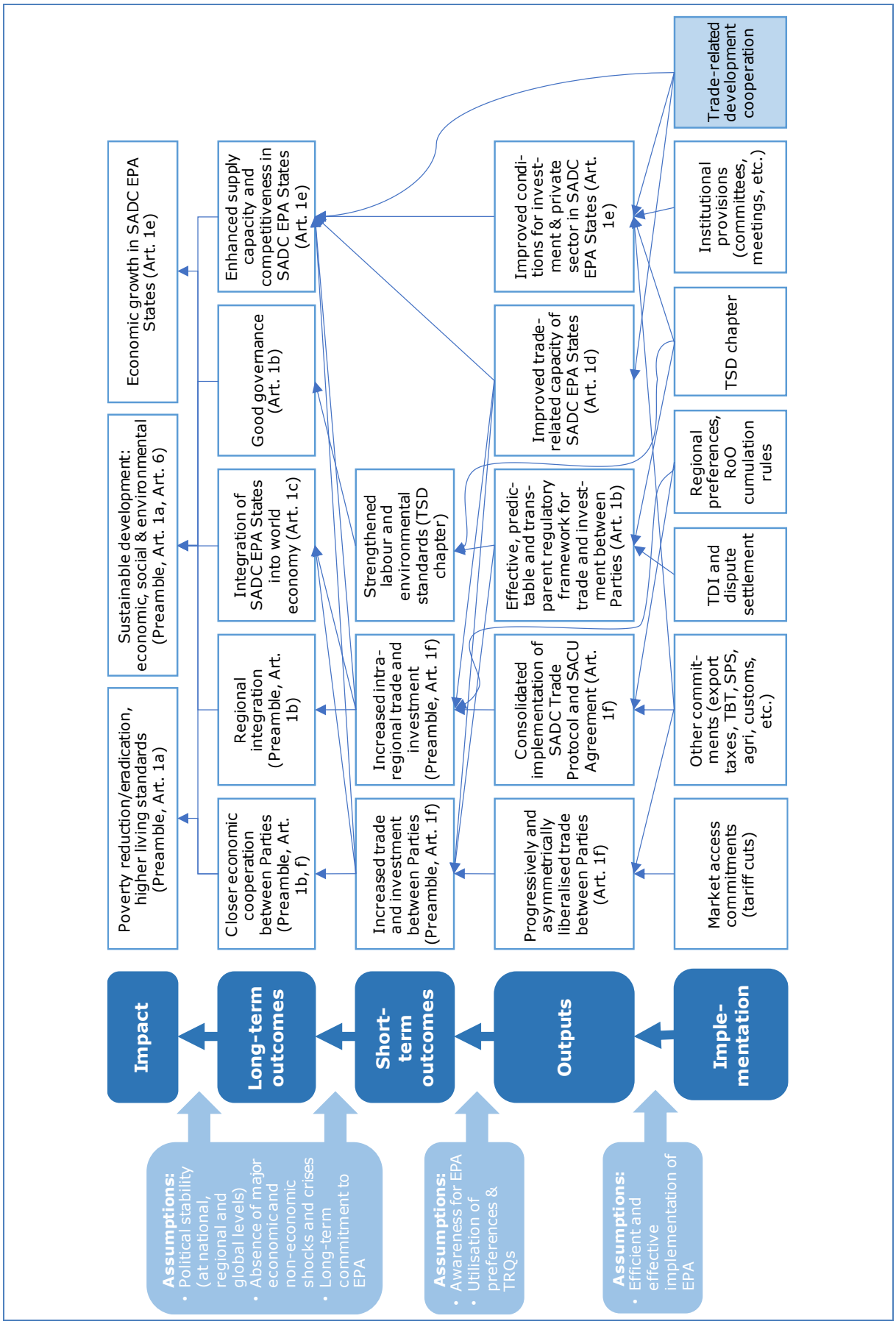
The starting point for the evaluation framework is the construction of an intervention logic that shows how the elements of the EPA are expected to lead to the ultimate developmental goals (Figure 2). The intervention logic has been developed based on a first version prepared by the European Commission and the EPA text. It takes the objectives of the EPA explicitly from (and provides links to) the EPA text, particularly the Preamble and Article 1, and complements this with assumptions at the various objective levels.

The intervention logic has then been used to develop the analytical framework of the evaluation. Following the Better Regulation guidelines as well as international good evaluation practice, the evaluation is guided by a set of high-level evaluation questions (EQs) that help assess the performance of the EPA across the standard evaluation criteria effectiveness, impact, efficiency, coherence, and relevance. The evaluation questions are linked to the evaluation criteria as shown in Table 1. The complete evaluation framework, which brings together the evaluation questions of the ToR, the associated judgment criteria and indicators, the data sources, and the methodological tools with which data are collected, is available in Annex C of the inception report.

In the final report, evaluation findings will be used to respond to the evaluation questions and derive conclusions on the implementation and effects of the EPA, as well as develop recommendations for any potential improvements.

[20] Available at: http://eu-sadc.fta-evaluation.eu/en/resources

Figure 2: Intervention logic of the EU-SADC EPA



Source: Own preparation based on the EPA and provisional intervention logic in the evaluation ToR.

Table 1: Evaluation criteria and evaluation questions – overview

Effectiveness (degree to which outputs and operational objectives are achieved)
• EQ 1: To what extent have the outputs and operational objectives of the EPA been achieved? • EQ 2: What are the factors influencing (positively or negatively) the achievement of the EPA's operational objectives? • EQ 3: Has the implementation of the EPA had unintended (positive or negative) consequences, and if so, which ones?
Impact (degree to which higher-level objectives are achieved)
• EQ 4: What has been the impact of the EPA on sustainable development in its economic, social, environmental, and human rights aspects?
Efficiency (ratio between resources and cost, and achieved outputs)
• EQ 5: To what extent has implementation of the EPA been efficient with respect to achieving its objectives? • EQ 6: To what extent are the costs associated with implementation of the EPA proportionate to the benefits it has generated, and how are they distributed across different stakeholder groups? • EQ 7: Are there unnecessary regulatory costs (including administrative burden)? What is the potential for simplification?
Coherence (degree of alignment between the EPA and other policies)
• EQ 8: To what extent has implementation of the EPA been coherent with the EU's trade and development policies – and in particular, with the EU's commitment to sustainable development in trade policies as a contribution towards attainment of the Sustainable Development Goals (SDGs)?
Relevance (degree to which the EPA addresses real needs of the Parties)
• EQ 9: To what extent do the provisions of the EPA continue to be relevant for the current trade needs and development issues of the EU and SADC EPA States, as well as geopolitical considerations?

PART B: PRELIMINARY EVALUATION FINDINGS

4 IMPLEMENTATION OF THE EPA

This chapter presents the preliminary findings on the implementation of the EPA, i.e. the extent to which the Parties put into practice the commitments which they made in the Agreement. The analysis comprises the key provisions in the EPA, and the sequence of section roughly follows the structure of the EPA, starting with a review of the implementation of the TSD Chapter (section 4.1), followed by an analysis of the implementation of various issues related to trade in goods (sections 4.2 to 4.10), the functioning of institutions created under the EPA (section 4.11), as well as the degree of awareness among public administrations, traders and other stakeholders for the Agreement (section 4.12). These findings, once further developed and finalised in the draft final report, will contribute to the evaluation of the EPA's efficiency and effectiveness (achievement of outputs).

4.1 Implementation of the TSD Chapter

The TSD Chapter in the EU-SADC EPA is more limited in scope than other TSD chapters in recent EU trade agreements, however, it does cover some basic commitments of the Parties: the Parties reaffirm their commitments to promote the development of international trade in a way that contributes to sustainable development in its three pillars and support the multidimensional development of the SADC EPA States with a view to reducing and eventually eradicating poverty. The Parties also recognise the value of multilateral environmental governance and agreements and reaffirm their commitment to implement the Multilateral Environmental Agreements (MEAs) that they have ratified. A similar provision refers to the ratified ILO conventions, and the Parties express their readiness to work together in both areas. They also recognise the right of each Party to regulate but consider it inappropriate to encourage trade or investment by weakening or reducing domestic levels of labour or environmental protection. Given that the Chapter does not establish a separate body to address TSD matters, the Parties agree that the dialogue and cooperation related to this chapter will take place through the TDC, and that dialogue and cooperation on trade and sustainable development may involve other relevant authorities and stakeholders.

A review of the activities under the EPA and notably meetings of the TDC suggest that the Parties did not make full use of the provision related to dialogue on TSD matters. To date, TSD issues featured on the TDC agenda three times (in February 2020, November 2021, and November 2022). On all occasions, the agenda item was limited to EU presentations providing information on the European Green Deal, the new legislation on critical raw materials, CO_2 standards for cars and vans and the new Communication on Trade and Sustainable Development (TDC, February 2020a; TDC, November 2021; TDC, November 2022). The EU initiative to include TSD-related aspects into the agenda has not been mirrored, however, by interest of the SADC EPA States and there was no other discussion in the TDC regarding legislation or policies of the Parties in areas covered by the TSD Chapter, notably on the respect for international environmental and labour standards, and no monitoring of the implementation of EPA provisions in these areas. That said, the set of monitoring indicators agreed by the Parties at the 7th TDC meeting in February 2021 includes two monitoring indicators related to the TSD Chapter, i.e., ratification of the ILO Conventions and MEAs.

Likewise, there has been no regular engagement with civil society that would replicate the EU practice from other new trade agreements. Civil Society Dialogue meetings were held in 2017 and 2018 in the SADC region. Their participants from the EU and SADC EPA States

formulated recommendations, including the establishment of a permanent civil society platform and enhanced outreach in the context of the EPA (European Commission, 2018a; European Commission, 2019c). In February 2019, both at TDC and the Joint Council meeting, the Parties committed to co-facilitate at least once a year a meeting of non-state actors from the EU and the SADC EPA States to discuss EPA-related issues and EPA's implementation (European Commission, 2020d). However, no such a meeting has taken place until now (November 2023) and TDC discussions about the formula to engage with non-state actors have not brought about any concrete results due to the lack of the SADC EPA States' readiness to engage in such a discussion and in a meaningful dialogue with civil society about the EPA implementation (TDC, February 2018; TDC, February 2019; TDC, February 2020a; TDC February 2021; TDC November 2021; TDC, November 2022).

Regarding the implementation of other TSD provisions, notably related to the implementation of international labour and environmental standards, progress made by the SADC EPA States is discussed more in detail in **Appendices C1 (social baselines) and D (environmental baselines)**. They also include an overview of other policy and legislative initiatives undertaken by the SADC EPA States in social and environmental areas.

In labour-related aspects, since the EPA started to be applied the SADC EPA States have made progress in the ratification of ILO fundamental, priority and other up-to-date Conventions. For example, Botswana has ratified the Labour Inspection (No. 81) and Labour Inspection in Agriculture (No. 129) priority Conventions. Lesotho has ratified fundamental Convention No. 187 (Occupational Safety and Health), Conventions No. 151 (Labour Relations), and No. 190 (Violence and Harassment) and the 2014 Protocol to the Forced Labour Convention (No. 29). Namibia has also ratified this Protocol, as well as Conventions No. 81 (Labour Inspection), No. 122 (Employment Policy), No. 151 (Labour Relations), No. 189 (Domestic Workers) and No. 190 (Violence and Harassment). Mozambique has ratified Convention No. 176 (Safety and Health in Mines), Maritime Labour Convention, 2014 Protocol to Forced Labour Convention No. 29 and Protocol to Labour Inspection Convention No. 81. South Africa has ratified Convention No. 190 (Violence and Harassment). There were no ratifications by Eswatini during the EPA period.

The SADC EPA States have also taken steps to improve the implementation of the ratified ILO Conventions, e.g., by adoption of new or revision of the existing legislation (e.g., new Employment Bill in Eswatini, Amendment Bill to the Labour Code in Lesotho and Combating of Trafficking in Persons Act in Namibia), and adoption of National Action Plans in areas such as the fight against child labour (Botswana, Lesotho, Mozambique, and South Africa) or trafficking in persons (Botswana, Lesotho, and South Africa). Other measures include the provision of training and awareness raising campaigns for the general public and officials (Botswana, Lesotho, Mozambique and Namibia), financial support to families with children (Lesotho), and support in school attendance (Mozambique and South Africa). Some of the actions have been evaluated. For example, results achieved as part of the National Action Plan to Combat the Worst Forms of Child Labour in Mozambique 2017-2022 comprised the enrolment of 7,395,512 students in primary education by 2022 (73% of the target), the construction of 1,183 primary education classrooms, benefitting more than 130,000 students (35% of the target), and the provision of school meal programmes for 206,158 students (CEACR, 2023). In some cases, steps have been taken to address child labour in sectors engaged in exports to the EU, e.g., in the tobacco sector in Mozambique.[21]

[21] In 2018, the Ministry of Labour signed an MoU with the Eliminating Child Labour in Tobacco Growing Foundation (ECLT) to develop and deliver a programme of focused activities (Global Tobacco Index, 2021). Since then, awareness raising activities on negative impacts of child labour and ways to prevent it have been delivered to 8,188 persons; 6,109 children have been supported to stay at school (assistance included help in homework, improved school infrastructure and provision of uniforms, school materials and hygiene products); 517 young people have received training enabling them to get a job and 1,164 families have received seeds for their gardens to support food security. Moreover, Community Child Protection Committees have been set up engaging parents, teachers and other community members helping to direct assistance to

These activities do not seem, however, to be linked to the EPA, but rather to the domestic policy agenda or other commitments, such as the SDGs and national pledges linked to Goal 8.7 (eradication of forced labour, including human trafficking and elimination of child labour), as well as cooperation with the ILO under Decent Work Country Programmes.

In the wider employment and social area, the SADC EPA States have been working with the ILO under Decent Work Country Programmes to address the most pressing needs, such as skills development, reducing unemployment through effective employment policies with an institutional coordination and decent job creation in formal and informal economy, moving from informal to formal economy, putting in place and extending social protection systems and strengthening social dialogue with capacity development of workers' and employers' organisations (ILO, 2019; 2020a; 2022; 2018; 2018a). Other policy and legislative steps have brought about mixed results. For example, in Namibia, consecutive editions of the National Employment Policy did not bring about the expected job creation and diversification of the economy as they were not aligned with the National Development Programme and the responsibility for their implementation was not well-defined between the government ministries (ILO, 2019). Given high unemployment rates among young people, the SADC EPA States have developed diverse initiatives to support job creation for this group. For example, Botswana has adopted the Revised Youth Policy, Youth Development Fund, the Young Farmers' Fund, the National Service Programme, and the Internship Programme. These have brought about results (by 2015-2016, 4,500 interns were offered permanent employment), however, given the scale of challenges, they had to be further strengthened and accompanied by other measures such as reform of the education system (ILO, 2020a). Discrimination on the labour market represents another challenge. Regarding South Africa, the ILO Committee of Experts noted in 2023 the amendment of the Employment Equity Act and a high level of non-compliance (94%) by employers with its previous version (CEACR, 2023).

Regarding environment protection and climate change, the SADC EPA States have made improvements in governance and implementation of policies resulting from MEAs.[22] The analysis shows that ratification of all MEAs considered in detail took place before the start of application of the EPA. A logical exception to this are the Paris Agreement from December 2015 and the Kigali Amendment to the Montreal Protocol from October 2016. These agreements were also ratified by all of the SADC EPA States with ratification dates similar to dates of ratification for the majority of all countries. Rather than looking only to the ratification of MEAs, the environmental assessment focuses on the implementation of these MEAs into national policies and measures, and to the reporting of progress (see Chapter 7 and Appendices D2-D7). As for labour conventions, considering the absence of any discussions between the Parties on matters covered by the TSD Chapter, the review of the evidence does not reveal a clear causal link from the EPA to the observed positive developments, which seem to have been driven primarily by other major factors, including increasing flooding and drought in some countries as a result of climate change.

4.2 Market Access Liberalisation

The main commitments made by the Parties under the EPA relate to market access preferences, specifically **tariff preferences**. Therefore, the evaluation assesses the

those in need (ECLT, 2018; ECLT, no date). Under another programme, in 2020, a new primary school was opened, to benefit 2,000 pupils, part of whom are children of tobacco growing farmers (Global Tobacco Index, 2021). Therefore, while it is possible that tobacco exports to the EU included products engaging child labour, that share may decrease over time if programmes like the ones mentioned bring about results and if farmers are paid decent prices that would allow them to generate sufficient income. In this way, the EPA may contribute to the reduction of child labour in the tobacco sector. The availability and affordability of adult (hired, seasonal) labour is also important as this would enable children to stay at school instead of working on a farm.

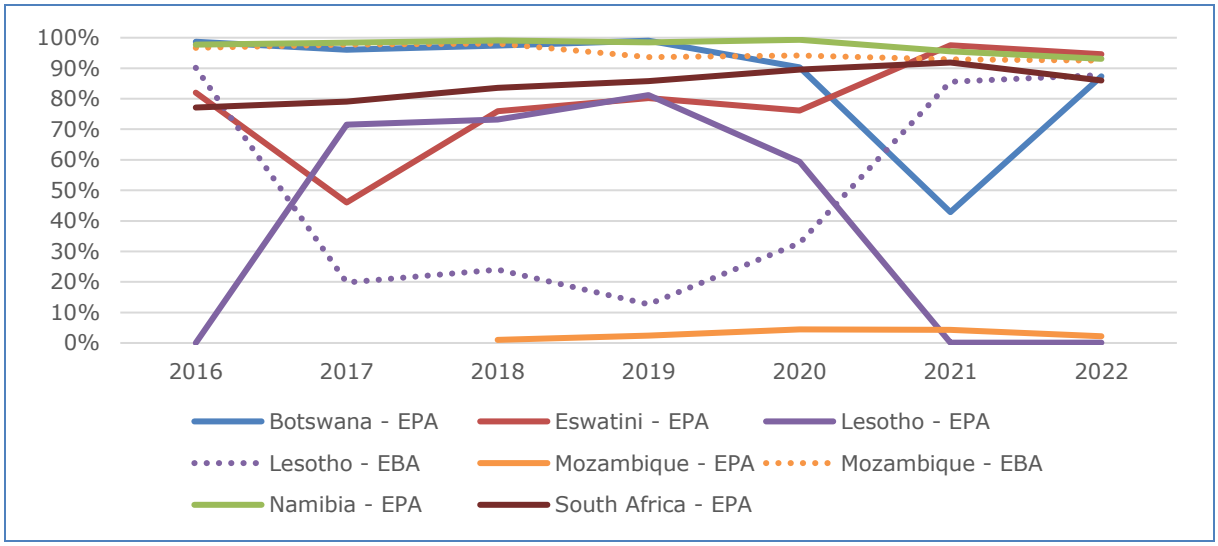
[22] For an overview of the MEAs included in the analysis and the date of ratification or accession by the SADC EPA States see **Appendix D1**.

degree to which the Parties actually implemented the tariff-reduction commitments by comparing the actual tariffs applicable in 2023 with those that would apply according to the commitments made in the EPA. This analysis includes a review of the changes in the customs classification of goods by the Parties caused by the moves between tariff nomenclatures (from HS 2012, used in the EPA schedules, to HS 2017 and HS 2022) and the introduction of new tariff lines that were not covered by the tariff reductions in the EPA.

At present, the analysis has been preliminarily conducted for the EU and SACU.[23] No major compliance issues could be identified so far; both economies in 2023 apply tariffs on imports from the other Party that appear to be broadly in line with the commitments made in the EPA. The very few instances where applied tariffs may exceed the commitments concern non-strategic products with limited bilateral imports; further analysis is needed to corroborate the preliminary findings.

The degree of **preference utilisation** by SADC EPA State exporters[24] is generally high, at 90% and more, and has mostly increased over time (Figure 3). The two exceptions are the LDCs Mozambique, which overwhelmingly continues to use the EBA (utilisation rates above 95%) rather than the EPA (utilisation rates below 5%), and Lesotho, whose exports after 2016 switched to using EPA preferences but then reverted to using EBA preferences since 2019 – a development that still requires further research.

Figure 3: Share of EU imports from SADC EPA States using preferences, 2016-2022



Note: The preference utilisation rate is calculated by dividing the value of imports using preferences by the value of imports eligible to use the preferences, according to the source database. Note that imports at zero MFN duty are not considered for this analysis as no preferences apply to such imports.
Source: Own calculations based on Eurostat COMEXT data (DS-059281); see Table 1 in Appendix A1.

Responses by stakeholders provided during the consultations to date indicate that the so far low EPA preference utilisation in Lesotho and Mozambique is the result of two factors. First, awareness for the EPA among exporters and freight forwarders still appears to be limited (also see section 4.12). Second, exporters already using the EBA preferences have seen no added value in switching to the use of EPA preferences, because they do not perceive any clear advantage of using EPA as compared to the EBA but nevertheless would be required to change systems and procedures, such as moving from the automated REX system to the manual EUR.1 certificates of origin. At the same time, changes in the use of

[23] The analysis for Mozambique still remains to be done.
[24] Preference utilisation of EU exports to the SADC EPA States remains to be analysed; not all corresponding data have so far been obtained by the evaluation team.

the EPA preferences are expected in the future. First, with awareness rising among Mozambique's businesses for the preferences which the EPA provides for imports of equipment and consumables, an increasing use of the EPA for imports is expected to also lead to a corresponding use of the EPA for exports. This is further facilitated by EU support provided to enhance Mozambique's exportable offer or in relation to rules of origin, e.g. as part of the *Promove Comércio* programme in Mozambique or the publication of the EU-SADC EPA guide on rules of origin published in 2018 and updated in 2022.

The EU and SACU countries also partially liberalised some agricultural goods using **tariff rate quotas** (TRQs). The utilisation of these TRQs has been uneven across products and over time.

Some EU TRQs for imports from South Africa have been consistently and fully used, such as sugar, frozen orange juice and one of the wine quotas (Table 2). On the other hand, a number of TRQs were not used at all, including dairy products, strawberries, citrus jams, and others. And a third category of products has seen partial use of the TRQs, but mostly with a declining utilisation trend. This applies to canned non-tropical fruit, apple juice, or yeast, with ethanol going against the trend: utilisation increased from about 15% up to 2019 to about 35% since 2020. The reasons for the differences in TRQ utilisation vary across products (although there were some general concerns by South African producers and exporters about the administration of TRQs in the country, as explained further below). Some products, such as dairy products, cannot be imported into the EU from South Africa due to SPS reasons.[25] For others, such as several juice types (as well as fruit pulp and concentrate), exporters stated that they would obtain better prices outside of the EU and hence not using the TRQs was a commercial decision. For other products, the reasons for limited TRQ use remain to be identified.

Table 2: Use of EU TRQs by imports from South Africa

Product category	Unit	Quota 2022	2017	2018	2019	2020	2021	2022
Skimmed milk powder	t	500	0%	0%	0%	0%	0%	0%
Butter	t	500	0%	0%	0%	0%	0%	0%
Strawberries	t	423	0%	0%	0%	0%	0%	0%
Sugar-refined	t	50,000	34%	99%	74%	82%	97%	99%
Cane sugar for refining	t	100,000	87%	100%	99%	100%	98%	100%
White crystalline powder	t	500	0%	0%	0%	0%	0%	0%
Citrus jams	t	100	0%	0%	0%	0%	0%	0%
Canned fruit: pears, apricots, peaches	t	57,156	52%	44%	45%	37%	31%	37%
Tropical canned fruit	t	3,320	0%	8%	0%	0%	0%	0%
Frozen orange juice	t	1,162	100%	100%	100%	100%	100%	100%
Apple juice and pineapple juice	t	4,180	19%	86%	4%	8%	2%	1%
Active yeast	t	350	24%	21%	18%	9%	3%	0%
Wine (small containers)	'000 l	81,448	64%	84%	76%	81%	38%	52%
Wine	'000 l	34,906	100%	95%	99%	93%	97%	100%
Ethanol	t	80,000	14%	16%	13%	33%	37%	35%

Source: Own calculation based on Commission's Reports on Tariff Quota Imports, several years.

The utilisation of SACU TRQs by EU exporters has also been uneven across products and time (Table 3) For some products, such as cheese, ice cream and wheat, utilisation was high (above 80% and up to 100%) in most years, whereas for other it was relatively low throughout the EPA period (barley, Mortadella Bologna) or decreased in recent years (pork, also wheat in 2022). While some of the reasons for low TRQ utilisation are product-specific, such as zero MFN duties in South Africa for wheat in 2022[26] or the South African import ban on pig meat from several EU Member States since 2020 in relation to African Swine

[25] South Africa is not among the third countries authorised to export to the EU.

[26] Effective from 2 July 2021 there is no import tariff on wheat. The South African wheat tariff is calculated by means of a variable tariff formula to ensure that local wheat prices are maintained when the international prices are declining to support local producers and vice versa to support local consumers when international wheat prices are rising. The latter is the reason for the current zero tariff on imported wheat.

Fever, stakeholders have also noted the burdensome and slow authorisation procedures in South Africa, also with respect to SPS requirements (see section 4.7 below).

Table 3: Use of SACU TRQs by imports from the EU

	Quota 2022 (t)	2017	2018	2019	2020	2021	2022
Pork	1,500	100%	88%	79%	17%	22%	23%
Pig fat	200	73%	76%	97%	93%	95%	55%
Butter and other dairy fats	500	18%	76%	100%	100%	54%	31%
Cheese	8,300	83%	51%	100%	79%	87%	80%
Wheat and meslin	300,000	100%	100%	100%	100%	94%	16%
Barley	10,000	20%	10%	10%	10%	10%	10%
Mortadella Bologna	100	20%	20%	38%	34%	36%	36%
Cereal based food preparations	2,300	20%	29%	100%	41%	94%	48%
Ice cream	150	82%	61%	99%	99%	100%	92%

Source: Own calculation based on data provided by SARS.

In consultations held so far, some stakeholders noted that the administration of TRQs in South Africa was cumbersome not only for EU exporters and their corresponding importers in South Africa. Also, South African exporters of products covered by TRQs in the EU needed to get an authorisation by the South African Department of Agriculture, Land Reform and Rural Development (DALRRD), which adds another layer of bureaucracy on top of the first-come-first serve principle applied by the EU upon import. Several stakeholders representing South African producers and exporter interviewed by the evaluation team noted that the issuance of quotas was slow and lacked transparency. The most recent decision by the South African Government to tie the issuance of quotas to exporters' Broad-Based Black Economic Empowerment status[27] will further affect the management of TRQs for exporters in South Africa. Further analysis is required to validate this information.

4.3 Use of Export Taxes

Many African (and other developing) countries see export taxes as a means to move up the value chain: by charging taxes on the export of raw materials, they hope to encourage local processing and beneficiation of primary goods, both from agriculture and mining.[28] In this view, also generally shared by SADC EPA country governments, export taxes, like other instruments restricting exports, such as authorisation requirements, are an instrument to develop domestic industries and manufacturing capacity, creating jobs, and diversifying the economy and exports.

On the other hand, export taxes constitute barriers to trade that a trade agreement should help remove or reduce. Accordingly, the vast majority of EU trade agreements have provisions prohibiting the introduction of export duties by the parties. In line with this, and because of the EU's need for raw materials, during the negotiations of the EPA the EU for a long time insisted "on a ban on all export taxes for South Africa and Angola, and a ban on export taxes for other SADC EPA countries in all but a few extreme cases" (Wood 2014).

In the end, provisions were made in the EU-SADC EPA so that export taxes could be introduced in exceptional circumstances. Article 26 of the EPA allows the SADC EPA countries to apply export taxes in "exceptional circumstances." This includes, for the BLMNS countries, where such measures are required for "specific revenue needs, or where necessary for the protection of infant industries or the environment, or where essential for the prevention or relief of critical general or local shortages of foodstuffs or other products

[27] Procedures for the Application, Administration and allocation of export quotas under the Economic Partnership Agreement between the European Union and Southern African Development Community for the year 2024, Government Gazette No. 49588, Vol. 700, 31 October 2023.

[28] Sometimes, export taxes have also been used to generate government revenue or improve food security.

essential to ensure food security" (Art. 26(2)). However, even this must be limited to "a limited number of products" and may only be done after consultations with the EU.

Furthermore, all SADC EPA States can temporarily introduce export taxes on no more than eight products at a time (at the HS6 level except for "ores and concentrates", where it applies at HS4 level) for a maximum of 12 years to satisfy industrial development needs. Any SADC EPA State proposing to impose such export tax shall notify the EU and must enter into consultations on the export tax if the EU so requests. Export duties may not exceed 10% of the ad valorem export value of the goods and the SADC EPA country shall exempt from such export tax a volume equal to the average volume exported to the EU in the three years prior to the imposition of the export tax.

While the objective of this part of the evaluation is to analyse the use of export taxes in SADC EPA States and their compliance with the conditions laid out in Article 26 EPA, there is relatively little to analyse in terms of implementation at the country level as only Namibia and South Africa use export taxes, whereas Botswana, Eswatini and Lesotho (and the EU) have none.

Namibia imposed export duties on various products in 2016, under the Export Levy Act; these were applicable to exports anywhere, including to the EU. The Act and schedules were amended in 2019 and 2020. The amendment in 2019 mostly expanded the list of products subjected to export duties (and in some case increased the duty), introduced a separate column for taxes applicable for exports to the EU, with some preferential export duties, and also increased legal certainty by adding HS codes to the covered products; the 2020 amendment introduced further changes to export duties on wood products, not applicable to exports to the EU. The products covered and rates applicable are (for details, see **Appendix A2**):[29]

- For **minerals, natural gas and crude oil products** (Schedule 1 of the Act), duties of up to 2% were introduced in 2016. In 2019, some duties (on marble and dimension stones) were increased to 15% but only for exports to non-EU destinations, and two new minerals, lithium and tantalum were added to the list, with export duties of 2%, but again not applicable for exports to the EU. The changes in 2019 are thus considered to be in line with the provisions of the EPA.
- For most **fish exports** (Schedule 2), an export duty of 1.5% was introduced in 2016. In 2019, the duty was removed for exports of kingklip to the EU (and the export duty of 1.0% on seal furs was removed altogether).
- Export duties on a small selection of **forestry products** (initially, devil's claw and hoodia) were introduced in 2016 (Schedule 3 to the Act). In 2019, these duties were expanded to cover a vast range of wood products. However, this expansion of the scope did not apply to exports destined for the EU, again in line with Article 26 of the EPA.
- **Hides and skins** were added to the products covered by export duties in 2019 (new Schedule 4 to the Act), with duties of 60% on raw hides, including when exported to the EU, and 15% on pickled skins, also applicable on exports to the EU. The introduction of these duties may have been justified under the exemptions of Article 26(2) or (3) of the EPA on a temporary basis. Nevertheless, the 2019 amendment makes no reference to the temporary nature of the measure, nor does it provide any justification for the application on the export duties to the EU. Also, no evidence could be found by the evaluation team that the introduction of the duties was discussed in the Joint Council, TDC or any of the Special Committees established under the EPA. Thus, although more analysis remains to be done, the imposition in 2019 of the duties on exports to the EU of hides and skins may have been against Namibia's EPA commitments.

[29] Based on the Act and amendments as provided at https://commons.laws.africa/%2Fakn/na/act/2016/2.

In early June 2023, the Government announced a ban on exports of "certain critical minerals such as unprocessed crushed lithium ore, cobalt, manganese, graphite and rare earth minerals" (Reuters 2023). The details of this export prohibition could not yet be obtained by the evaluation team, but media coverage indicates that the ban is being enforced (Nyaungwa 2023). The EPA in principle prohibits Parties' use of quantitative restrictions but allows them to be applied in conformity with WTO rules (Article 39). Without knowledge of the legal instrument underpinning the export ban, the evaluation cannot assess whether the ban is in line with the EPA; this remains to be further analysed provided the necessary documentation can be obtained.

South Africa has levied an export duty of 5% on unpolished diamonds since 2008 (Diamond Export Levy Act, No. 15 of 2007). This applies to exports regardless of the destination and is in compliance with the EPA, as the duty was neither introduced nor increased since the start of application of the EPA.

Another export tax (and ban) relates to scrap metal. It was imposed in 2020 with effect from 1 August 2021.[30] Exports to the EU are not exempted from the duties but benefit from preferential rates (of mostly 10%) as opposed to the 15%-20% that apply at MFN level (Table 4). The purpose of the duty is to provide foundries and mills with better access to higher quality and more affordable scrap metal in the local market, and as such its introduction may have been justified under the exemptions of Article 26(3) of the EPA (industrial development needs) on a temporary basis, and subject to the conditions established in Article 26(4) – exemption of the EU from the export duties during the first six years, and cap of 10% on the rate applied on exports to the EU. Whereas the South African measure complies with the second condition, the first one does not seem to have been fulfilled. Also, the evaluation team has so far found no evidence that the introduction of the duties was discussed in the Joint Council, TDC or any institution established under the EPA.

In addition, on 30 November 2022, the Minister of Trade, Industry and Competition issued a policy directive instructing ITAC to suspend the operation of the PPS and not issue any export permits for two HS codes (72.04 and 74.04) for a period of six months, thereby effectively banning the export of the covered products (waste and scrap of copper and iron or steel, excluding stainless steel).[31] The measure was extended in June 2023 by another six months.[32]

[30] A policy directive on the exportation of ferrous and non-ferrous waste and scrap metal had been in place since 2013 (Notice 470 of 2013), stating that scrap metal "should not be exported unless it has first been offered to domestic users" and subjecting exports to export controls. This policy directive was also extended in 2021, until 2023 (Government Notice 654 of 28 July 2021). For the implementation of the policy directive, South Africa's International Trade Administration Commission (ITAC) had introduced a Price Preference System (PPS) under which ITAC would only authorise the exportation of scrap metal after it had first been offered for sale to the domestic consuming industry of scrap metal for a period and at a price discount or other formula determined by ITAC. However, a review of the PPS found "that the PPS alone has not effectively provided support to the foundries and mills with availability of affordable, quality scrap metal" (SARS 2021), justifying the introduction of the export tax, in view of the South African Government.

[31] No.R. 2802, Government Gazette No. 47627 of 30 November 2022. According to the WTO, the "export ban was complemented by an export permit system for semi-finished metal products, and an import permit system for furnaces and various other scrap transformation machines, both from November 2022" (WTO Secretariat 2023b, 301).

[32] Government Gazette No. 48791 of 15 June 2023.

Table 4: South Africa's export duties on scrap metal, general rates and rates for exports to the EU

Tariff code	Description	Rate of export duty	
		General	EU
72.04	**Ferrous waste and scrap; remelting scrap ingots of iron or steel:**		
7204.10	Waste and scrap of cast iron	20%	10%
7204.2	**Waste and scrap of alloy steel:**		
7204.21	Of stainless steel	15%	10%
7204.29	Other	20%	10%
7204.30	Waste and scrap of tinned iron or steel	20%	10%
7204.4	**Other waste and scrap:**		
7204.41	Turnings, shavings, chips, milling waste, sawdust, filings, trimmings and stampings, whether or not in bundles	20%	10%
7204.49	Other	20%	10%
7204.50	Remelting scrap ingots	20%	free
7404.00	Copper waste and scrap	10%	10%
7602.00	Aluminium waste and scrap	15%	10%

Source: Schedule 1, Part 6A, to the Customs Schedule, available at https://www.sars.gov.za/wp-content/uploads/Legal/SCEA1964/LAPD-LPrim-Tariff-2021-02-Schedule-No-1-Part-6.pdf

According to the WTO (WTO Secretariat 2016; 2023b), South Africa also has export levies in place on various agricultural products: these, according to the 2016 TPR, apply to the export of citrus, cotton, certain dairy products, deciduous fruits, dried fruits, fynbos (protea), lucerne, mango, olive, pecan nut, potato, pork, poultry, red meat, sorghum, table grape, wine and grapes, and winter cereals (WTO Secretariat 2016, para. 4.19). However, according to information provided to the evaluation team by the South African Revenue Service (SARS), the only export duties that apply are those on diamonds and scrap metal.[33] Further research by the evaluation on this topic is still needed.

4.4 Use of Trade Defence Instruments and Disputes

Between the time the EPA was applied provisionally (October 2016) and the end of March 2023, South Africa[34] initiated 21 anti-dumping (and no countervailing) investigations. Of these, nine (or 43%) were aimed against EU[35] exports of pasta, chicken and potato chips. Anti-dumping duties were imposed in all nine of these investigations. In addition, six sunset reviews, of which three resulted in the maintenance of duties, were also conducted against EU member states. All of the original investigations (and sunset reviews) took more than 12 months to complete (as required by Article 5.10 of the Anti-Dumping Agreement), but the reports do not indicate any special circumstances. As of the end of October 2023, South Africa had 43 anti-dumping duties in place, of which 12 applied to imports from the EU.[36]

Box 2: Summary of trade remedies institutions and procedures in the SADC EPA States

Mozambique does not at present have a trade remedies regime.[37]

In SACU, the Council of Ministers has delegated all tariff-related decisions, including those on trade remedies, to the International Trade Administration Commission; trade defence institutions in other SACU countries are to be established or operationalised. ITAC is responsible for all aspects of trade remedies investigations. The main applicable legislation is the International Trade Administration Act (71 of 2002) (ITA Act) and its ancillary regulations (the Anti-Dumping Regulations of 2003; the Countervailing Regulations of 2004; and the Safeguard Regulations of 2005), as well as Chapter VI of the Customs and Excise Act (91 of 1964).

[33] The SARS website also only refers to the two products, see https://www.sars.gov.za/customs-and-excise/export-duties-and-levies/ [last accessed on 02 November 2023].

[34] The investigations are initiated and conducted by South Africa, although any measures imposed will apply to all imports into SACU. See Box 2 for a summary of the trade remedy system in SACU.

[35] Note that the investigations are conducted against individual EU members, rather than against imports from the EU as a whole. This tends to inflate the number of investigations, as there would have been only three EU-directed investigations otherwise.

[36] WTO document G/ADP/N/377/ZAF, 14 April 2023, updated to reflect the outcome of the Frozen potato chips investigations against Belgium, Germany and the Netherlands.

[37] Note that the EU is currently assisting Mozambique, through *Promove Comércio*, to draft the necessary legislation and set up the necessary institutions.

The domestic industry is defined as either the producers of the like product as a whole in SACU or those of them whose collective production represents a major proportion of the industry. To date, only one investigation (Soda Ash from the United States of America) related to an industry consisting of only a single producer that was not in South Africa (being situated in Botswana), while a very limited number of investigations (for instance, Blankets from Turkey) have considered information from producers in countries other than South Africa (in that case, Botswana). For instance, although there are poultry producers in several of the SACU members, only information from selected South Africa companies were taken into consideration in all the poultry investigations and reviews, simply because such companies represent by far the majority of total production in SACU.

Anti-dumping and countervailing under the EPA take place in terms of WTO rules (Art. 32 of the EPA) and the same procedures outlined above apply. The same applies to multilateral safeguards (Art. 33.1 of the EPA). As regards bilateral safeguards, ITAC would conduct a preliminary investigation and then make a recommendation to the Minister of Trade. This may or may not then be discussed at the SACU Council of Ministers for the imposition of a provisional measure before it is referred to the EPA TDC in terms of Article 34.7(a) of the EPA. If the TDC does not agree on the measure within 30 days, the Minister of Trade or the SACU Council of Ministers may unilaterally impose the measure.

Any industry may apply to ITAC for anti-dumping, countervailing or safeguard measures to be applied.[38] ITAC will then investigate the application to determine the merits thereof.[39] Technically, ITAC, as South Africa's "National Body", should then make a recommendation to the SACU Tariff Board, which, in turn, makes a recommendation to the SACU Council of Ministers. However, the SACU Tariff Board has never been operationalised and the SACU Council of Ministers has delegated its decision-making powers in this regard to ITAC. Although this technically means that ITAC must make the final decision, and that the Minister of Trade has to implement the SACU Council of Ministers' decision (as taken by ITAC), in practice, ITAC makes a recommendation to the Minister of Trade, who then requests the Minister of Finance to implement any measures. No Tribunal exists to review ITAC/Ministerial decisions on trade remedies, and aggrieved parties have to approach the High Court in Pretoria for judicial review.

During the same period, South Africa initiated four safeguard investigations (into steel screws with hexagon heads; fully threaded fasteners; bolts; and structural steel), three of which resulted in the imposition of safeguard duties that impacted exports from the EU (the investigation into structural steel was terminated), while two more safeguard measures, on hot-rolled steel and steel screws with hexagon heads, were also extended. No SACU safeguards remain in place at present.

To date, South Africa/SACU has conducted one safeguard investigation under the TDCA/EPA, which resulted in the imposition of a safeguard duty against poultry imports from the EU, for a period of 4 years. The EU disputed this decision, and after consultations failed, referred the matter to arbitration. The Tribunal ruled in favour of the EU, but only after the measure had already lapsed (Box 3).

Box 3: Summary of the arbitration process on South Africa's safeguards on poultry

Under the EPA, consultations "shall" be held within 40 days of the receipt of the request for consultations and are deemed to be finalised within 60 days from the date of the request, unless both Parties agree to continue consultations. Where a dispute proceeds to arbitration, Article 80 requires that each Party "shall" appoint one arbitrator within 10 days of the date of receipt of the request for the establishment of an arbitration panel, and that these two arbitrators will then select the third member within 20 days from the request. If a party does not appoint an arbitrator within the set deadline, the other party can ask the chair of the TDC to select the missing arbitrator(s) by lot.

In this case, consultations were first requested on 14 June 2019 but only took place on 13 September 2019, that is, 91 days after the request. The request for arbitration was submitted on 21 April 2020, but the EU immediately communicated to SACU the intention to suspend the process because of the impact of COVID-19. On 27 October 2020, the EU proposed that the arbitration resumes and indicated the name of the EU appointed arbitrator. However, SACU repeatedly delayed the appointment of its arbitrator and also disputed the procedure for the appointment of the chairperson. As a result, the selection process of three members of the arbitration panel was completed only on 2 March 2021 with the selection by lot of the chairperson. Although the EPA provides that the panel shall generally provide the parties with its interim report within 120 days, and the final report within 150 days, from establishment of the panel, after 195 days the EU's arbitrator withdrew for personal reasons and had to be replaced. Due also to the time necessary to agree on the contracts to be

[38] S 26 of the ITA Act.
[39] S 16 of the ITA Act.

signed with the arbitrators, the arbitration panel was only deemed to be established on 29 November 2021, a total of 398 days after the EU had requested that the arbitration be proceeded with. Following difficulties encountered by the panel, it twice sought an extension to the date on which it had to submit its preliminary report. The report was eventually made available to the parties on 4 July 2022, some 217 days after the panel had been deemed to be established. The final report was issued 30 days later. Thus, from the date the EU requested that arbitration should be proceeded with, it took 665 days before the panel issued its report to the parties.

Without going into any of the legal and factual issues raised in the course of arbitration, and even allowing for COVID-19-related delays, this shows that the arbitration is not working efficiently at present and that Parties should agree on the procedures going forward or amend the relevant provisions of the EPA.

The EU has also applied trade remedies affecting the SADC EPA States, notably the inclusion of South Africa in the EU's multilateral safeguards on steel in April 2022, following the expiry of the five-year exemption period for SADC EPA States under Article 33 of the EPA.[40] Although SACU requested an extension of the exemption, the EU rejected this request because of the EU's longstanding policy not to give in its trade agreements any preferential treatment with regard to multilateral safeguard measures, which had been granted under the EPA only for an exceptional transitional period. In addition, the exemption had already expired at the time (see section 4.11 below).

The administrative and legal analysis prepared to date, which also covers the transparency of investigations, started with a review of official documents related to the cases, as well as secondary literature (e.g., de Klerk 2019). In order to obtain a full picture of the cases identified, consultations were held with industry representatives, specifically in the poultry segment, where consultations were held both with the South African Poultry Association (SAPA) and the Association of Meat Importers and Exporters (AMIE). Some of the evaluation team members were also directly involved in some of the anti-dumping investigations against the EU (notably poultry and frozen potato chips) and have personal insight into investigation procedures.

At present, there are two trade remedies investigating units at ITAC (Trade Remedies 1 and Trade Remedies 2). Work is allocated between the units on the basis of capacity and no distinction is made between the work each unit does. Transparency has generally improved over the last few years and the Commission will now often email information on the public file to interested parties on request, rather than requiring parties to physically access the files. However, this is partially owing to significant restriction on access to the campus of the Department of Trade, Industry and Competition (DTIC), and many staff members still working from home. At the same time, there are some concerns with transparency, as information that should not be regarded as confidential is treated as confidential (such as the combined information of several domestic producers), while proper non-confidential versions of information submitted in confidence are not always required. ITAC also requires interested parties (notably exporters) to collect their full submissions if any deficiencies are identified. This then requires a full resubmission of all information. However, the investigating officers may then find some new deficiencies in information that was originally submitted, but where such deficiencies had not been pointed out. In such instances, although a party has another opportunity to address the deficiencies, all their information is rejected for purposes of the preliminary determination and they become subject to the residual duty. This can prevent exporters from remaining in the market for the duration of the provisional payments, which are always set at 6 months. If any deficiencies remain, the exporter's information is rejected in toto, that is, ITAC not only uses facts available in respect of deficient information, but in respect of all information. Finally, the South African legislation provides for a WTO-inconsistent methodology to determine the weighted average margin of dumping, namely one based

[40] Commission Implementing Regulation (EU) 2022/664 of 21 April 2022 amending Implementing Regulation (EU) 2019/159 imposing a definitive safeguard measure against imports of certain steel products, OJ L 121/12, 22.04.2022.

on export volumes rather than on price discrimination.[41] Very few investigations are concluded within fewer than 15 months, while the sunset review on frozen potato chips from Belgium and the Netherlands had to be terminated as the review took more than 18 months to complete. However, it was only terminated after legal threats by interested parties.

4.5 Implementation of customs and trade facilitation-related provisions

The customs and trade facilitation measures are an integral part of trade policy development. Under the EU-SADC EPA these measures are governed by Chapter IV (Articles 41 to 50). According to Article 41, this chapter specifically aims to reinforce cooperation in the area customs and trade facilitation with a view to ensuring that the relevant legislation and procedures, as well as the administrative capacity of the customs authorities, fulfil the objectives of effective control and the promotion of trade facilitation. Each Party has specific sets of legislation applicable to customs and trade facilitation. In the case of the EU, the general customs legislation is contained in the Union Customs Code[42] and the related Commission delegated and implementing acts which provide more detailed rules[43]. SADC EPA States' customs legislation is available in their respective Gazettes and through their online platforms.[44]

Since the EPA started to be applied, a set of **customs and trade facilitation measures and reforms were adopted and implemented by the Parties**.

First, by September 2023 all EPA States had ratified and started to implement the WTO Trade Facilitation Agreement (TFA), which entered into force in February 2017.

Second, new customs laws and procedures were adopted by the Parties. **On the EU side**, there have been various developments, among which a selection is presented in this section, such as the approval of the Customs Action Plan consisting of 17 actions to be implemented by 2025 and the phased-approach implementation of the EU's Import Control

---

[41] Anti-Dumping Regulation 12(b)(ii) provides as follows:
12.2 In cases where more than one product is under investigation, the Commission shall normally determine the margin of dumping as follows:
(a) …
(b) in the case of products that cannot be separately identified by the South African Revenue Services, the Commission shall normally
(i) …
(ii) determine the weighted average margin of dumping for all products on the basis of the individual export volume of each product.
Thus, ITAC does not determine the total *value* of the dumping and then divide it by the total export value, but determines the margin of dumping percentage for each product group (it also often collapses several product code numbers (PCNs) into a single "model" (as was done in the poultry cases) and weights this percentage by the relative volume of exports of that particular model. Thus, if model 1 had a margin of dumping of 10% and it represented 10% of a company's exports, and model 2 had a margin of dumping of 40% and represented 90% of the company's exports, the weighted average margin of dumping would be ((10%*10%)+(40%*90%)) 37%. This may be higher or lower than the actual dumping taking place. The Panel specifically rejected this methodology in *Morocco – School Books*, para. 7.157.

[42] Regulation (EU) No 952/2013 of the European Parliament and of the Council of 9 October 2013 laying down the Union Customs Code; consolidated version: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02013R0952-20221212

[43] Commission Delegated Regulation (EU) 2015/2446 of 28 July 2015 supplementing Regulation (EU) No 952/2013 of the European Parliament and of the Council as regards detailed rules concerning certain provisions of the Union Customs Code (consolidated version: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02015R2446-20230314) and Commission Implementing Regulation (EU) 2015/2447 of 24 November 2015 laying down detailed rules for implementing certain provisions of Regulation (EU) No 952/2013 of the European Parliament and of the Council laying down the Union Customs Code (consolidated version: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02015R2447-20221220).

[44] Tariff Book updates for Mozambique (https://www.mef.gov.mz/index.php/publicacoes/legislacao-dngrh/1825-pauta-aduaneira-e-ice) and SACU (https://www.sars.gov.za/legal-counsel/primary-legislation/hs-2022/)

System (ICS2). As well, the EU Regulation on the EU Single Window Environment for Customs (Regulation (EU) 2022/2399) entered into force on 12 December 2022; it has run so far in pilot mode and makes it mandatory for all EU member States to join the Government-to-Government component of the initiative by early 2025, i.e., the first phase. As of January 2017, the EU applies its Registered Exporter (REX) System under the Generalised Scheme of Preferences (GSP)/Everything But Arms (EBA) arrangement (WTO Secretariat 2023a) (but not the EPA). **On the side of SADC EPA States**, their customs tariff books were migrated to the HS 2022 nomenclature; and the e-certification of origin was approved by the Committee of Ministers of Trade in June 2019.

In terms of **implementation issues**, in February 2019, the EU raised a concern related to the use of compulsory questionnaires for customs valuation in SADC EPA countries, a measure that was reportedly applied by South Africa. It viewed the measure as cumbersome, and the requirement to share sensitive private information (exporters' production costs) a potential contravention to Articles 43 (Customs Legislation and Procedures) and 46 (Customs Valuation) of the EPA,[45] An issue that has since been resolved. Generally, speaking, however, stakeholders consulted to date by the evaluation team observed that from a customs perspective implementation of the EPA posed no major operational problems, and those issues that did arise were usually addressed at the technical level, respectively in the Special Committee (see section 4.11).

With respect to cooperation, in line with Article 41(d), SADC EPA States have benefited from the implementation of key regional and national **EU-funded technical assistance support programmes in the area of customs and trade facilitation** (also see chapter 9). For example, the Directorate General for Taxation and Customs Union (DG TAXUD) in 2018 and 2022 provided capacity building on rules of origin (see more details in section 4.9).

At the **SADC level**, the Trade Facilitation Programme (2019-2024), which benefits from financial and technical assistance from the EDF to support the development of the wider trade facilitation agenda including chapter IV of the EU-SADC EPA, is being implemented to address barriers to trade and facilitate the harmonisation and recognition of trade tools with the aim of increasing intra-regional and international trade and reaping the benefits of the EU-SADC EPA. Some of its key results[46] to date include (i) the adoption of the Regional Framework for the e-Certificate of Origin by the SADC Committee of Ministers of Trade in June 2019 (the Framework was officially launched in September 2022 and four Member States – among which two SADC EPA States, Eswatini and Namibia (in addition to Malawi and Zambia) are already implementing it); (ii) piloting of the Regional Customs Transit Guarantee in four Member States (Botswana, Mozambique, South Africa from among the SADC EPA States, and Zimbabwe); and (iii) the development of a web portal on the EU-SADC EPA with promotional videos to increase awareness of the potential benefits that the private sector can seize from better use of the opportunities offered by the EPA.

The EU has also provided technical assistance programmes in customs and trade facilitation to **individual SADC EPA Member States**. For example, Mozambique was supported in the elaboration of its EPA Implementation Plan (2018) and is currently being supported by *Promove Comércio* in its implementation of, *inter alia,* the customs and trade facilitation provisions of the EU-SADC EPA and the WTO TFA. Additionally, an implementation audit

[45] Joint Report, Second Meeting of the EU-SADC EPA Special Committee on Customs and Trade Facilitation, 19 February 2019, Cape Town, South Africa

[46] SADC Trade Facilitation Programme (2019-2024), viewed at: https://www.eeas.europa.eu/delegations/botswana/eu-sadc-trade-facilitation-programme-tfp-%E2%80%93-2019-2024_en

was conducted in July 2023, which identified capacity building needs for customs officials to implement the EPA Rules of Origin (Protocol 1); trainings are yet to take place.

4.6 Use of Technical Barriers to Trade

TBT measures refer to technical regulations and procedures of assessment of conformity with technical regulations, excluding measures covered by the chapter on sanitary and phytosanitary measures. A technical regulation is a document that sets out product characteristics or related processes and production methods, including the applicable administrative provisions, with which compliance is mandatory. It may also include or deal exclusively with terminology, symbols, packaging, marking or labelling requirements as they apply to a product, process or production method. A conformity assessment procedure is any procedure used, directly or indirectly, to determine whether relevant requirements in technical regulations or standards have been fulfilled, including, *inter alia*, procedures for: sampling, testing and inspection; evaluation, verification and assurance of conformity; registration, accreditation and approval; and a combination thereof (UNCTAD 2019).

The TBT framework under the EU-SADC EPA is governed by Article 52 under which both Parties agreed, *inter alia,* to cooperate in order to facilitate and increase trade in goods between them by identifying, preventing and eliminating unnecessary barriers to trade within the terms of the WTO TBT Agreement. Despite not being predominant in the discussions between the Parties, TBT issues are of particular importance to them and have occasionally been discussed in the meetings of the Special Committee of Customs and Trade Facilitation as the issues had an impact on customs procedures. For example, in the Committee's first meeting held in January 2018, the EU raised a trade concern with significant trade facilitation implications, namely the considerable delays by South Africa in **releasing imports of electronic and electro-technical appliances and equipment due to the procedures to check compliance with compulsory specifications** – it was noted that it can take up to 6 months for the competent authority in South Africa (the National Regulator for Compulsory Specifications) to issue the Letter of Authority authorising the customs authorities to release the goods. This has negative consequences in terms of further distribution of the products in the SADC market as well as in terms of availability of recent technology in the market.[47] The issue was further discussed at the bilateral level between the EU and South Africa in mid-2018 and was expected to be raised in the Trade and Development Committee under the EU-SADC EPA. It is not clear whether this issue has been resolved. Another issue raised by EU stakeholders relates to **idiosyncratic requirements in SADC countries related to packaging and labelling**. Such requirements (e.g., for alcoholic drinks) make it unprofitable for EU business to produce in the small batches required to meet SADC demand, thus effectively restricting EU exports. The EU raised several times in the WTO TBT committee the South Africa proposed revisions to their alcohol beverage composition, production, and labelling regulation. South Africa is currently revising its proposal. The EU also raised in the WTO TBT committee the new Mozambican conformity assessment program that replaced a pre-shipment inspection, for which a certificate of conformity can only be issued by one company and for which the exporter needs to pay a percentage-based fee per consignment.[48]

In the other direction, key stakeholders from the SADC EPA States interviewed by the evaluation team recognised the importance of ensuring compliance with TBT measures in the EU market. Table 5 provides details of sectors most affected by EU TBT measures. These include textiles and clothing, vegetables, hides and skins, chemicals, food stuffs machinery and electrical equipment, all with a TBT non-tariff measure (NTM) coverage

[47] EU-SADC EPA, 1st Meeting of the Special Committee on Customs and Trade Facilitation. Minutes of Meeting, 25 January 2018

[48] EU concerns raised at the WTO are available at: https://tradeconcerns.wto.org/EN/stcs/details?imsId=733&domainId=TBT

ratio above 99%. Textiles and clothing, chemicals, machinery and electric equipment, metals, vegetables and animals have the highest NTM product count. The highest percentage of NTM-TBT-affected duty-free imports are on fuels (72%), wood (64%) and chemicals (56%).

Table 5: EU TBT measures by sector, by coverage ratio

Sector	Coverage ratio (%)	Nr of affected products	Duty free coverage ratio (%)	Affected duty free imports (%)
Textiles and clothing	100	796	100	1.3
Vegetables	99.86	347	99.67	38.81
Hides and skins	99.83	68	96.59	4.83
Chemicals	99.82	753	99.90	55.86
Food products	99.77	209	100	33.84
Machinery and electrical equipment	99.40	760	100	48.43
Animal products	99.29	314	89.40	5.51
Transportation equipment	98.37	122	36.77	0.79
Footwear	97.63	43	100	0.29
Plastic or rubber	95.40	198	55.14	4.11
Fuels	94.82	25	93.47	73.97
Miscellaneous	92.71	294	94.94	48.14
Metals	89.62	502	81.03	33.62
Wood	84.54	193	81.60	64.85
Stone and glass	55.42	140	43.37	31.74
Minerals	15.44	60	11.86	11.38
Memo: All sectors	94.12	4,824	89.28	41.51

Source: https://wits.worldbank.org/tariff/non-tariff-measures/en/type-count/country/EUN/ntmcode/B

The main concern raised by stakeholders in SADC EPA States was that limited conformity assessment infrastructure and service availability in the SADC region hindered practical access to the EU market. The EU has been providing **targeted technical and financial assistance regionally and nationally** to enhance TBT governance and infrastructure. In this regard, several interventions have been made by the EU through the SADC TRF across SADC countries (not only SADC EPA States) and include support for implementation of Eswatini's Regulatory and Quality Policy in 2018, including through the establishment of the Quality Awards Competition which aims to increase quality awareness. National support programmes include the acquisition of metrology equipment for Mozambique's Institute for Standards and Quality (INNOQ) in 2022, which is expected to expand calibration and legal metrology inspections in the country (e.g., by extending the scope of ISO/IEC 17025 accreditation of INNOQ for metrology services and enable broader recognition of Mozambique's metrology system regionally and internationally).

4.7 Implementation of SPS Measures

SPS measures are applied to protect human or animal life from risks arising from additives, contaminants, toxins or disease-causing organisms in their food; to protect human life from plant or animal-borne diseases; to protect animal or plant life from pests, diseases, or disease-causing organisms; to prevent or limit other damage to a country from the entry, establishment or spread of pests; and to protect biodiversity (UNCTAD 2019). These include measures taken to protect the health of fish, wild fauna, forests and wild flora. Other than those defined above, measures aimed at protecting the environment, consumer interests or for animal welfare are not covered by sanitary and phytosanitary measures. An SPS measure can become a non-tariff barrier when applied for the purposes of market protection, rather than health and welfare.

The SPS governance framework under the EU-SADC EPA is set out in Chapter VI and Annex VI. In particular, according to Article 60 the Parties agreed, *inter alia,* to facilitate trade and investment within the SADC EPA States and between the Parties while ensuring that measures adopted apply only to the extent necessary to protect human, animal or plant life or health in accordance with the provisions of the WTO SPS Agreement. Additionally,

Annex VI defines a set of SPS priority products and sectors, which are divided into two groups: (i) for SADC EPA States' harmonisation (e.g., fresh meat and cereals); and (ii) for SADC EPA states' exports to the EU (e.g., fish and aquaculture products and fruits and nuts).

SPS-related issues are of particular importance to the Parties since they are often listed in the Commission's annual reports on EPA implementation, and further ones provided in the EU's Access2Markets database.[49] Some issues have been carried over from the TDCA. For example, the 2017 report on the TDCA implementation stated that: "Trade in agricultural products has remained the most sensitive area in EU-SA bilateral relations, with SA [South Africa] challenging our interpretation of human and animal risk and our SPS requirements. EU SPS requirements for game, ostriches, horses and citrus have ranked at the top of bilateral dialogues under the TDCA" (European Commission 2017, 68). Meanwhile, the reports for 2019 and 2020 specifically referred to market access issues for EU poultry exports to South Africa following the avian influenza outbreaks in the EU, with the latter report summarising that "EU Member States are still banned from exporting poultry meat to South Africa. Since South Africa does not recognise EU regionalisation decisions,[50] the issue is now about re-opening the market access after the Member States have been declared avian influenza-free in accordance with the international standards of the World Organization for Animal Health" (European Commission 2021, 96). The report for 2021 reiterated the same concern (European Commission 2022).

Overall, evidence suggests that developing countries and LDCs have historically faced challenges to export to the EU market largely due to the difficulty and cost of complying with EU SPS product standards (Unnevehr 2003; Gourdon and Nicita 2013; Shepherd and Wilson 2013). Around 60% of food products entering the EU market are affected by least one type of these standards (Cadot and Gourdon 2016). Table 6 shows the sectors affected by the EU SPS measures, and hence, with an impact on imports from SADC EPA states – animal products, vegetables, and food products face the highest degree of NTM coverage.

Table 6: EU Sanitary and phytosanitary measures by sector, by coverage ratio

Sector	Coverage ratio	Affected product – count	Affected duty free imports %	Duty free product count (HS6)
Animal products	99.91	321	6.07	37
Vegetables	99.13	334	38.45	91
Food Products	91.77	193	32.98	20
Plastic and Rubber	47.94	80	3.69	18
Hides and Skins	46.67	29	4.8	14
Chemicals	42.23	243	19.71	58
Wood products	39.12	100	32.84	85
Metal products	21.70	102	1.44	14
Stone and Glass	5.91	38	0.24	2
Machinery and Electrical Equipment	3.67	61	0.01	3
Textiles and Clothing	2.40	36	0.96	14
Miscellaneous	1.36	6	0.88	1
Minerals	1.27	10	0.72	9
Fuels	0.01	1	0.01	1
Memo: All sectors	17.04	1554	5.26	367

Source: https://wits.worldbank.org/tariff/non-tariff-measures/en/type-count/country/EUN/ntmcode/A [accessed on 29 September 2023].

Non-compliance with EU SPS standards can have serious commercial consequences, including import rejections of specific shipments and even outright bans. For a preliminary

[49] See e.g. https://trade.ec.europa.eu/access-to-markets/en/barriers/details?isSps=true&barrier_id=12301

[50] According to Article 6.1 to 6.3 of the WTO SPS Agreement, regionalisation refers to an area, whether all of a country, part of a country, or all or parts of several countries, as identified by competent authorities, in which a specific disease or pest, does not occur or occurs at low levels and which is subject to effective surveillance, control or eradication measures.

analysis, the number of EU border rejections of imports from SADC EPA has been done – this will need to be complemented with more comprehensive research also considering the incidence of border rejections (and other alerts reported in the Rapid Alert System for Food and Feed, RASFF) in relation to trade values, and comparing them with rejections of imports from other sources. Several caveats of using RASFF notifications as an indicator for the performance of bilateral trade under the EPA from an SPS perspective should also be noted: First, important changes in the EU's SPS legislation in recent years have required trade partners to adapt to comply with amended the EU standards, which may drive up notifications. Second, animal or plant disease outbreaks also have an impact on the interceptions and/or in trade and do not result from a poor implementation of the EPA (or technical assistance provided under it). And third, the RASFF only allows for a one-way assessment but not to measure EU SPS market access to the SADC EPA Partners.

Over the period 2020-2022, there were 29 cases of EU border rejections of imports from SADC EPA States. Of these, 15 were of imports from South Africa and 11 were of imports from Mozambique. Fish products (12 rejections or 41% of the total) and fruit and vegetables (eight rejections or 28% of the total) were the most frequently impacted product groups (see Table 7).

Table 7: EU Border rejections of SADC exports by most affected products (2020-2022)

	ZAF	MOZ	NAM	BWA	SWZ	LSO	Total	% of total
Fish and products thereof	2	7	3	0	0	0	12	41.4
Fruits and vegetables	7	1	0	0	0	0	8	27.6
Nuts, nut products and seeds	3	0	0	0	0	0	3	10.3
Crustaceans and products thereof	0	2	0	0	0	0	2	6.9
Non-alcoholic beverages	1	0	0	0	0	0	1	3.4
Cephalopods and products thereof	0	1	0	0	0	0	1	3.4
Soups, broths, sauces and condiments	1	0	0	0	0	0	1	3.4
Dietetic foods, food supplements foods	1	0	0	0	0	0	1	3.4
Total	**15**	**11**	**3**	**0**	**0**	**0**	**29**	**100**

Source: Prepared by the authors based on data from RASFF, https://webgate.ec.europa.eu/rasff-window/screen/search [accessed on 30 September 2023]

The main reasons for these EU border rejections were mercury in fish, improper health certificates, and presence of aflatoxin (see Table 8).

Table 8: Reasons for EU Rejecting SADC EPA states' food and feed (2020 - 2022)

	ZAF	MOZ	NAM	BWA	SWZ	LSO	Total	% of total
Mercury in fish	0	7	1	0	0	0	**8**	27.6
Improper health certificate	3	1	2	0	0	0	**6**	20.7
Aflatoxin	4	0	0	0	0	0	**4**	13.7
Exceeding the (MRL) (propiconazole)	3	0	0	0	0	0	**3**	10.3
Propiconazole	2	0	0	0	0	0	**2**	6.9
Imazalil	1	0	0	0	0	0	**1**	3.4
Unauthorised novel food in food supplement	1	0	0	0	0	0	**1**	3.4
Sulphite	1	0	0	0	0	0	**1**	3.4
Pieces of glass in raisins	1	0	0	0	0	0	**1**	3.4
Identification marks absence and species mismatch	0	1	0	0	0	0	**1**	3.4
Salmonella	0	1	0	0	0	0	**1**	3.4
Total	**16**	**10**	**3**	**0**	**0**	**0**	**29**	**100**

Source: Prepared by the authors based on data from RASFF, https://webgate.ec.europa.eu/rasff-window/screen/search [accessed on 30 September 2023]

In order to address the SPS challenges faced by SADC exporters, the Parties have agreed to implement **development cooperation** initiatives (Trade and Development Committee, February 2019). A set of EU-funded technical assistance programmes have been implemented at regional and national levels (also see chapter 9)

First, there was the SADC Trade Related Facility (TRF), a regional programme aimed, *inter alia,* at supporting SADC EPA States to implement the EU-SADC EPA.[51] Its operations ran from February 2015 to March 2021. Through Window 2 of the SADC TRF, SADC EPA States (excluding South Africa) were each eligible to EUR 1.2 million to help implement the obligations and to take advantage of the market access opportunities arising from the EPA. As confirmed by key stakeholders during interviews, this programme had positive results. The examples of interventions in Lesotho and Mozambique are worth noting. Over the period 2017-2019, through its Ministry of Agricultural and Food Security, Lesotho benefitted from (i) ten (10) awareness workshops on SPS requirements, attended by a total of 197 people of whom 104 were women; (ii) the recruitment of two (2) SPS border inspectors at Maputsoe and Maseru, which increased the national capacity to issue SPS import permits from 20 to 1000 per year, and SPS certificates from 100 to over 400 per year; and (iii) improved laboratory facilities and practices including, *inter alia*, deployment of High-Performance Liquid Chromatography equipment for the analysis of samples for pesticide residue and mycotoxins; training of staff; and establishment of new testing disciplines on plant microbiology. For its part, Mozambique, with its improved capacity, successfully submitted 15 Notifications to the WTO, African Union (AU) and Ping Alert. The most relevant of these were the WTO notifications regarding the temporary ban on importation of all meats, meat products and meat-derived products originating from Brazil with codes SIF 825, SIF 2155, SIF 3459, SIF 3796 and SIF 4460, to safeguard food security. Additionally, the training of SPS inspectors means they are now conducting their tasks in line with more harmonized SADC Standards and Guidelines. The main weaknesses of regionally-based interventions to date have been limited funding and delayed disbursement of funds.[52]

Second, interventions at the national level have also played a significant role in assisting existing and potential exporters to comply with EU SPS measures to access the EU market. For example, since March 2020, through *Promove Comércio*, a EUR 6.5 million programme funded by the EU, Mozambique has been benefitting from technical assistance to enhance the capacity of SMEs to improve their quality and competitiveness. This technical assistance has been delivered through different export-oriented training programmes aimed at building capacities of SMEs and entrepreneurs to comply with quality and other export requirements as well as to address other business-oriented subjects.[53] According to key stakeholders interviewed by the study team, by end September 2023, more than 20 SMEs participating in targeted value chains benefitted from direct technical assistance. This programme is slated to end in March 2024. Furthermore, while Mozambique's Fisheries Inspection Institute (INIP) has benefitted from UNIDO-led technical assistance to, *inter alia,* expand its ISO/IEC 17025 testing capabilities, an apparent major weakness is the limited direct support to government institutions issuing SPS export certificates to address the causes of EU border rejections in areas such as heavy metals (fisheries) and traceability of false codling moth (fruits).[54]

4.8 Use of the Regional Preference Clause

Article 108 of the EPA relates to regional preferences. It contains two sub-provisions, the first of which provides that a Party (such as a SADC EPA State) is not obliged to extend to the other Party (such as the EU) any more favourable treatment which is applied by a Party as part of its respective regional integration process. This means, for instance, that South Africa does not have to extend to the EU treatment equally favourable to the treatment it

[51] https://www.sadc.int/latest-news/trade-related-facility-trf-commences-operations [accessed on 20 September 2023]
[52] https://www.sadc.int/success-stories/sadc-trade-related-facility-success-stories-2020 [accessed on 20 September 2023]
[53] https://promovecomercio.org/index.php/en/home/# [accessed on 20 September 2023]
[54] EU amendment regulation on false codling moth: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32022R0959&qid=1655828318869 [accessed 27 September 2023]

extends to Mozambique under the SADC Agreement. The second sub-provision provides that any more favourable treatment that a SADC Party provides to the EU must also be extended to the SADC Parties. Thus, if the EPA results in South Africa extending more preferential treatment to the EU on a specific issue than it does to Mozambique, such more favourable terms will also have to be extended to Mozambique.

Based on a review of the tariff books of SACU and Mozambique, a comparison of tariffs that the SADC EPA States apply to each other with the preferential tariffs offered to the EU under the EPA has been undertaken by the evaluation team. This showed that **Mozambique** offers zero-duty access for imports from the other SADC EPA States for all products covered by its EPA commitments (in fact, the 2023 tariff book makes no distinction between the EPA and the SADC Trade Protocol regarding the excluded products).

For the **SACU Members**, only one tariff line was identified where the intra-SADC preferential duty was higher than the EPA preferential duty: HS 6201.20 Men's or boys' overcoats, car-coats, capes, cloaks, anoraks (including ski-jackets), wind-cheaters, wind-jackets and similar articles (excluding those of heading 62.03): Of wool or fine animal hair. Here, the EU rate is 27%, and the SADC rate 45%.[55] Note that for all other products in HS chapter 62, the SADC rate is "free", and the stated tariff for 6201.20 might thus be a clerical error (in which case, it should be corrected).

4.9 Rules of Origin

The EU-SADC EPA rules of origin were crafted to support the development of regional value chains. This is done by maximising the number of goods that can benefit from duty-free access to the respective other Party.

Protocol 1 to the EPA sets out the rules and criteria to determine the originating status of products exported under the EU-SADC EPA. The Protocol and its annexes cover some 196 pages, and essentially contain two different criteria: wholly obtained and sufficiently worked or processed products. It also provides for cumulation of origin. Wholly obtained means that the product must be entirely obtained within a Party (Art. 7). Sufficiently worked or processed means that materials imported from other countries may be used but such must be sufficiently worked or processed to obtain origin status (Art. 8f). Annex II to the Protocol contains a list of the working or processing that must be undertaken to bestow origin. This may be done in three different ways. First, it is determined how much non-originating value is included in the ex-works price of the product exported. The typical non-originating value would be up to 40%, although this differs between products. Second, the processing must result in the final product acquiring a different tariff classification to the raw material or the input used. Third, the material must undergo a specific operation or processing. Cumulation means that products or inputs obtained in another country may be considered as originating in a SADC EPA State where the final product is manufactured, provided certain conditions are met. Thus, for instance, raw materials obtained in Eswatini could be considered as originating in South Africa when incorporated in a product manufactured in South Africa. Cumulation may take place in three ways, namely bilateral cumulation, diagonal cumulation, and extended cumulation. Bilateral cumulation relates to cumulation between a SADC EPA State and the EU, which includes the use of EU raw materials in a product processed in the SADC EPA State or vice versa (Art. 3), while diagonal cumulation means that a SADC EPA State could further process goods originating in another SADC EPA State, in an ACP EPA state or in the EU's Overseas Countries and Territories (Art. 4). Extended cumulation means that a SADC EPA State exporter could

[55] https://www.sars.gov.za/wp-content/uploads/Legal/SCEA1964/Legal-LPrim-CE-Sch1P1Chpt1-to-99-Schedule-No-1-Part-1-Chapters-1-to-99.pdf

source materials benefitting from DFQF access in the EU from any GSP[56] or EBA country or materials (from anywhere in the world) that have zero duties under MFN treatment in the EU (Art. 5f), excluding products that are subject to anti-dumping or countervailing duties in the EU. Cumulation is not allowed with products that cannot be exported to the EU DFQF (including those originating in South Africa), and tuna products (HS chapters 3 and 16) cannot be cumulated. Finally, the EPA contains the possibility to provide for derogations from the rules of origin upon request by SADC EPA States, as well as two automatic derogations, one for Namibia, for an annual quota of 800 tonnes of prepared or preserved Albacore tuna made from non-originating tuna; and one for Mozambique expiring after five years after the start of implementation of the EPA, for shrimps, prawns and lobsters caught in Mozambique's Exclusive Economic Zone and landed and processed in Mozambique (Art. 43 of Protocol 1).

The evaluation's review of the implementation of the EPA's rules of origin provisions has only just started, and a systematic presentation of findings remains to be done. The observations that can already be made at this stage are, however:

- Despite the topic of cumulation having been addressed as an important issue to facilitate regional value chains among the SADC EPA States (and beyond), progress to activate the diagonal cumulation has been very slow: implementation of it started in SACU only in June 2023, and remains to be activated in Mozambique. Stakeholders in SADC EPA States criticised that the concept of diagonal cumulation and the corresponding required administrative procedures – notably the requirement to have administrative cooperation among the countries with which diagonal cumulation takes place (Art. 4(9)(a) of the Protocol) – were too complicated. The exclusion of cumulation with South African products that are subject to TRQs in the EU was also criticised. Finally, some stakeholders considered that the EPA had introduced a bias in favour of the EU: because the Agreement considered the EU as one Party, cumulation of origin across EU Member States was automatic, whereas this was not the case for SACU Member States. It should however be noted that this was a function of the negotiations where the EU negotiated as a single legal entity as opposed to the SADC members that negotiated as separate legal entities.

- Although cumulation was discussed frequently in the Special Committee, and both the Commission (DG TAXUD) and the GIZ provided technical assistance to customs officials of SADC EPA States on rules of origin, stakeholders interviewed by the evaluation team – both public administration and businesses – continued to be unsure about the concept of diagonal cumulation and its application in practice, including the nature and extent of administrative cooperation across SADC EPA States.

- The obligatory use of the EUR.1 form for EPA preferential market access to the EU for non-approved exporters of consignments of more than €6,000, and non-acceptance of e.g. the REX system or other e-certification was criticised by a number of exporters, customs brokers and their associations in SADC EPA States, as it constitutes an additional administrative burden for them, making it more costly than alternative and more modern forms of origin certification.

- On the positive side, origin fraud does not appear to have been a major problem during the EPA implementation so far, according to customs authorities interviewed by the evaluation team.[57]

[56] Including GSP+ beneficiary countries. Materials that benefit from DFQF treatment in the EU for GSP+ beneficiary countries but not under the GSP standard arrangement are excluded from extended cumulation.

[57] Statistics on the number of verification requests issued to the respective other Party were however not provided to the evaluation team.

4.10 Geographical Indications

Geographical indications (GIs) inform consumers that the product they purchase was grown or produced in a particular region and, as such, possesses certain qualities unique to the relevant geographical area. They valorise the traditional know-how needed to preserve their characteristics and quality, and make it broadly known and appreciated. Thus, when a consumer buys *Rooibos* tea, the consumer knows that it was grown in the Cederberg in the Western Cape, according to an identified standard. Likewise, when a consumer buys *Champagne*, it is a guarantee that the product originates from the Champagne region in France, according to an identified standard. The GI recognition enables consumers to trust and distinguish quality products while also helping producers to market their products better.

GIs are regulated by Protocol 3 of the EPA. This Protocol only applies between the EU and South Africa,[58] i.e., it does not apply to Botswana, Eswatini, Lesotho, Mozambique, or Namibia (Art. 1 of Protocol 3). These other SADC members may "adhere" to the Protocol – only in relation to GIs – by "lodging an application with the Special Committee on GIs and trade in wines and spirits" under Article 13 of the Protocol. For South Africa, currently listed GI product categories are tea, meat, beer (although no beers are subject to GIs at present), wines, and spirits. For the EU, currently listed GI product categories include fruit, vegetables and cereals fresh or processed; cheeses; meat; olive oil; "other products (spices etc)"; natural gums and resins; confectionery; baker's wares; essential oils; fisheries products; sauces; beers; wines; and spirits (Annex I to Protocol 3).

South Africa agreed to protecting about 250 EU GIs, including 105 GIs for agricultural products and foodstuffs (including cheeses, olive oils and meat products). In return, the EU protects 105 South African GIs, with an option to add 30 more GIs with priority for protection. The EPA also provides for the co-existence of some names like Feta, Sherry, and Valencia oranges.

In South Africa, GIs are regulated under various pieces of legislation. This includes the Merchandise Marks Act No 17 of 1941, Trade Marks Act No 194 of 1993 (Trade Marks Act) and Liquor Products Act No 60 of 1989 (Liquor Products Act).

In March 2019, South Africa promulgated GI Regulations[59] that provide for the registration of South African GIs (Reg 4), foreign GIs (Reg 5), and foreign GIs included in "international free trade agreements" (Reg 6), which are defined as "any bilateral or multilateral treaty, convention, or agreement to which the Republic of South Africa is a party/ signatory, and any arrangement between the Republic of South Africa and another country, concerning the protection of geographical indications" (Reg 1). The Regulations provide for the Executive Officer to "establish and maintain an electronic Register of all South African GIs and foreign GIs, including foreign GIs that form part of international agreements, registered by him/her in terms of regulation 12" (Reg 13(1)). The Regulations relate only to primary or processed agricultural products for sale in South Africa and does not include liquor products as defined under the Liquor Products Act, and prohibits the unauthorised use of registered GIs (Reg 3, read with Reg 21).

Both "Certification Marks" and "Collective Marks" may be registered under the Trade Marks Act, where "collective marks" indicate that the producer belongs to the certifying organisation, while "certification marks" confirm that the goods are of a particular geographic origin or quality (see, e.g., Lubinga et al. 2020). Under the Liquor Products Act, the Wine and Spirits Board certifies that products originate within a particular region. Finally, the Merchandise Marks Act provision for marking of merchandise and the use of

[58] According to Adebola (2023), South Africa is the only African country with bilateral agreements on GIs.

[59] Regulations relating to the protection of geographical indications used on agricultural products intended for sale in the Republic of South Africa, N 447 in GG 42324 of 22 March 2019.

certain words and emblems in marketing a product, and empowers the Minister of Trade, Industry and Competition to prohibit the use of any mark or word in connection with any trade or business of such product whenever there is a need (S 15). The Merchandise Marks Act can thus be applied to prohibit the use of domestic and foreign GIs in South Africa.

As far as could be ascertained, only one GI has been recorded on the South African register to date, being *Karoo Lamb*[60] on 26 October 2023.[61]

GIs have become of both political and economic significance as marketing tools and drivers through which rural development could be attained. They are perceived as a vehicle through which rural communities can penetrate into domestic and international markets to benefit from their cultural/natural identities while conserving indigenous knowledge. This notwithstanding, GIs do not enjoy universal support in South Africa, and critics have argued that GI protection is not in line with the established principles of intellectual property law, "that its recognition has, in fact, been principally motivated by selfserving protectionism on the part of the EU" and that there is no basis "to justify GI protection as a distinct form of intellectual property, and its recognition says more about the politics of IP law, rather than the merits of this form of protection" (Karjiker 2020). Similarly, Soko and Qobo argued that the EU stood accused of "flexing its muscles and exploiting vulnerabilities with preferential access to its markets" (Soko and Qobo 2017, 148). Even during the EPA negotiations, the EU's push for widespread GI recognition was seen as "financially detrimental" to many South African companies specialising in products covered by GIs (Parshotam 2021, 96).

The analysis of the implementation of GIs on the ground, potential economic effects, as well as of the Protocol on trade in wines and spirits remains to be done.

4.11 Implementation of Institutional Provisions

The EPA envisages the establishment of joint EU-SADC institutions to oversee and manage the implementation of the Agreement. They include the Joint Council, the Trade and Development Committee (TDC), Special Committee on Customs and Trade Facilitation (SCCTF), Special Committee on Geographical Indications and Trade in Wine and Spirits (this one is only with South Africa), and an Agricultural Partnership. Other aspects, such as TBT, SPS or Trade and Sustainable Development, for which no dedicated body has been foreseen, can be addressed by the TDC. Moreover, the Agreement provides for the possibility for the TDC to establish special technical groups "to deal with specific matters falling within their competence" (Article 103.3).

Joint Council

The Joint EU-SADC EPA States Council is the highest body under the EPA (Articles 100-102 of the EPA). It brings together relevant members of the Council of the EU and the European Commission, as well as Ministers of the SADC EPA States or their representatives. In matters where SACU acts collectively, their representatives are treated as such in the Joint Council. The Council shall meet at regular intervals not exceeding two years. Extraordinary meetings are possible if the Parties so agree.

---

[60] https://www.westerncape.gov.za/news/gi-registration-karoo-lamb-promise-financial-and-reputational-benefits; https://www.news24.com/fin24/economy/amazing-day-for-sa-karoo-lamb-is-now-protected-just-like-champagne-20231027

[61] https://www.factssa.com/news/geographical-indicators-whats-in-a-name/, https://www.mondaq.com/southafrica/product-liability--safety/977468/geographical-indications-are-they-on-the-map-in-south-africa. Note that https://onlinelibrary.wiley.com/doi/full/10.1111/jwip.12255 indicates that South Africa has 88 registered GIs, but the reference to the register does not exist. Also note that because of SPS issues, Karoo lamb cannot be exported to the EU at present.

In line with Article 101, the Joint Council is responsible for the operation and implementation of the EPA and for monitoring the fulfilment of its objectives. It examines any major issue arising under the Agreement which may have an impact on trade relations between the Parties and any recommendations from the Parties to review the Agreement. It monitors economic and trade relations between the Parties and impact of cooperation provisions. It may also review any other matter covered by the Agreement. The Joint Council adopts its own rules of procedure and those of the TDC, and monitors the work of that Committee. Pursuant to Article 102, the Joint Council is empowered to take decisions in any matters related to the Agreement. Such decisions shall be taken by consensus and are binding upon the Parties.

The first (and so far only) meeting of the Joint Council was held in February 2019. The Council adopted then its own rules of procedure, as well as those of the TDC.[62] Another decision adopted at the same meeting relates to the rules of procedure for dispute avoidance and settlement, and the Code of Conduct for arbitrators and mediators.[63] Also, to complete the setup of the institutional framework, the Joint Council endorsed the adoption by the TDC of the list of arbitrators. Finally, the Joint Council endorsed the new trigger levels for products denoted by an asterisk in Annex IV of the EPA on agriculture safeguards to be implemented following conclusion of internal procedures of the Parties (Joint Council, 2019).

At the 2019 meeting, The Joint Council also reviewed the EPA's impact on trade relations between the Parties, as well as issues related to duties imposed by SACU on EU textile products and bone-in chicken cuts, and considered the factors necessary to enable SADC EPA States to fully benefit from the Agreement (e.g., investment, increased manufacturing capacity, sustainable employment, and diversified exports). The Joint Council also acknowledged a need to better address the Parties' concerns and to enhance to that end cooperation on SPS measures and other aspects such as safeguard measures. It also stressed the importance of the participation of non-state actors in the implementation of the EPA and holding annual meetings of civil society representatives from the EU and SADC EPA States to discuss the implementation. Finally, the Council also welcomed progress in establishing common monitoring and evaluation framework (Joint Council, 2019). Many of these issues continue to be relevant implementation issues at the time of this evaluation (see other sections in this chapter).

In July 2022 the Joint Council adopted decisions enabling the start of negotiations with Angola on its accession to the EPA[64] as well as on the adjustment of the reference quantities for certain products eligible for safeguard measures listed in Annex IV to the EPA.[65] According to the available information, both decisions were adopted through a written procedure. This would suggest that since October 2016 only one meeting of the Joint

---

[62] Decision No 1/2019 of the Joint Council established under the Economic Partnership Agreement between the European Union and its Member States, of the one part, and the SADC EPA states, of the other part of 19 February 2019 on the adoption of the rules of procedure of the Joint Council and of the Trade and Development Committee: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:22019D0437&from=DE

[63] Decision no 2/2019 of the Joint Council established under the EPA between the European Union and its Member States, of the one part, and the SADC EPA States, of the other part, of 19 February 2019 on the adoption of the Rules of Procedure for dispute avoidance and settlement and the Code of Conduct for arbitrators and mediators: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:22019D0438&rid=1

[64] Decision No 2/2022 of the Joint Council established under the Economic Partnership Agreement between the European Union and its Member States, of the one part, and the SADC EPA States, of the other part of 26 July 2022 on the request from Angola pursuant to Article 119(1) of the EPA: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:22022D1499

[65] Decision No 1/2022 of the Joint Council established by the Economic Partnership Agreement between the European Union and its Member States, of the one part, and the SADC EPA States, of the other part, of 26 July 2022 on the adjustment of the reference quantities for certain products eligible for safeguard measures listed in Annex IV to the EU-SADC Economic Partnership Agreement: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:22022D1498

Council took place, despite the EPA provision foreseeing the meetings to be held every two years.

Moreover, while Article 26 of the EPA foresees a review by the Joint Council no later than three years from the EPA entry into force the provisions of this Article related to export duties and taxes (see section 4.3 above for more details), the Joint Council meeting report does not include such an agenda item (Joint Council, 2019), which suggests that the review has not taken place yet.

Trade and Development Committee (TDC)

According to Article 103 of the EPA, the TDC assists the Joint Council and is composed of senior officials representing the Parties. It facilitates and supervises the implementation of the Agreement and implementation of the Joint Councils' decisions. It recommends to the Joint Council priorities for cooperation activities and escalates to it recommendations to act on any issues covered by the Agreement to avoid a conflict. The TDC also has the possibility to establish technical working groups, adopt their rules of procedure and supervise their work. It also monitors the development of regional integration and trade and economic relations between the Parties, and may discuss and take actions to support trade, investment, and business opportunities between the Parties. The Committee also monitors the implementation of the cooperation-related provisions of the EPA, reviews cooperation-related priorities and activities, and makes recommendations in this area.

To date, the TDC has held nine meetings, the last one in November 2022; with the next meeting planned for early 2024. During the first ones, the Committee focused on procedural aspects and setting up the institutional framework. This included discussions on its own rules of procedure, the rules of procedure on dispute settlement, the list of arbitrators, the operation of other technical committees, and indicators for monitoring and evaluation (European Commission, 2018a). As noted above, it took over two years since the start of the implementation of the Agreement (until February 2019) to establish the institutional framework enabling the institutions to operate and take binding decisions. The set of indicators for monitoring and evaluation was agreed in February 2020 and extended by two more indicators in 2021. However, the preparation of the first joint monitoring report has been delayed by capacity constraints of the SADC EPA States. To address it, they benefitted from capacity building by an external consultant in 2021 (TDC, February 2020a; TDC, February 2021; European Commission, 2022f). In 2020, the TDC started a discussion on Angola's accession to the EPA, with a view to preparing a Joint Council decision on it (TDC, February 2020a; TDC February 2021). An agreement on that decision was reached in November 2021 (TDC, November 2021). In 2021, the Parties started the discussion on the EPA review (as provided in Article 116) and in 2022, they agreed to take stock of the technical work done on this by the end of July 2023 (TDC, November 2021; TDC, November 2022).

In November 2021, the TDC discussed the request of the SADC EPA States regarding the extension of their exclusion from multilateral safeguards (TDC, November 2021). This happened after the expiry of the timeline envisaged by Article 33 of the EPA, according to which the exclusion would apply for five years from the Agreement's entry into force and additionally, no later than 120 days prior its end, the Joint Council shall review the operation of the exclusion "in the light of the development needs of the SADC EPA States, with a view to determining the possible extension for a further period". When the SADC EPA States raised the issue again in November 2022, the EU explained that the exclusion

had already expired on 10 October 2021 and therefore, there was no possibility to extend it (TDC, November 2022).[66]

TDC meetings have also been used to review developments in EU-SADC trade relations, trade relations with third countries and matters related to the WTO, the work of specialised bodies, the work on national EPA implementation plans, development cooperation and transparency towards the private sector. The Parties also discussed approaches for implementing certain EPA provisions, such as the management of TRQs, trigger levels for agricultural safeguards, cumulation, and updates in tariff lines and customs nomenclature (TDC, February 2018; TDC, November 2018; TDC, February 2019; European Commission, 2018a). It took four years (until February 2021) to reach an agreement on trigger levels for agricultural safeguard, and the SADC EPA States expressed their concern about the length of the process (TDC, February 2021).

Moreover, the Parties used TDC meetings to raise issues of concern and to discuss their respective interpretations of EPA provisions in aspects that may lead to disputes, such as SADC safeguard measures for imported EU poultry or SADC duties for EU textile products (TDC, February 2018; TDC November 2018). The EU also expressed concerns regarding investigations on frozen potato chips and bolts (TDC, November 2021). On the other hand, the SADC EPA States raised difficulties with increasing imports of EU small vehicles having potentially a negative impact on the local automotive sector and regional value chains (TDC, February 2019) and also indicated that SPS requirements in the EU represent a challenge and limit exports in products, such as citrus fruit, game, lamb, and sheep meat. This resulted in the Joint Council adopting Joint Communiqué acknowledging the need to better address the Parties' concerns and to enhance the cooperation on SPS measures (Joint Council, 2019).

Finally, the Parties also discussed aspects not solved satisfactorily at the negotiation stage, such the engagement of non-state actors in the implementation of the EPA (TDC, February 2018; TDC, February 2019; TDC, February 2020a; TDC February 2021; TDC November 2021; TDC, November 2022). However, while in February 2019, both at TDC and the Joint Council meeting, the Parties committed to co-facilitate at least once a year a meeting of non-state actors from the EU and the SADC EPA States to discuss EPA-related issues and EPA's implementation (European Commission, 2020d), no such a meeting has taken place until now (mid-2023). Before, Civil Society Dialogue meetings had been held in 2017 and 2018. Their participants from the EU and SADC EPA States formulated recommendations, including on the establishment of a permanent civil society platform and enhanced outreach in the context of EPA (European Commission, 2018a; European Commission, 2019c).

While, based on Article 65, the TDC also has a role in monitoring SPS issues, these have largely been discussed bilaterally, between the EU and South Africa (European Commission, 2019c). Also, while Article 57 stipulates that the TDC monitors the implementation of the TBT chapter and provides a forum for consultation and coordination on TBT-related matters, to date no discussion on those aspects has been reported.

Moreover, pursuant to Article 10 of the EPA, dialogue and cooperation related to the TSD chapter should take place within the TDC. However, such discussions have so far rarely taken place (see section 4.1 above).

[66] Also see the more fundamental considerations of the European Commission regarding the exceptional nature of the transitional exclusion of SACU from multilateral safeguards mentioned in section 4.4 above.

Special Committee on Customs and Trade Facilitation

The SCCTF is established pursuant to Article 50 of the EPA. It monitors the implementation of the EPA chapter on customs and trade facilitation, Protocol 1 on rules of origin, and Protocol 2 on mutual administrative cooperation on customs matters. It provides a forum for discussion and consultation on rules of origin, customs, customs procedures and valuation, and mutual administrative assistance on customs matters. The SCCTF should also support cooperation and capacity building on these matters and monitor implementation of Article 47 of the EPA on regional customs harmonisation.

To date, four meetings of the SCCTF have been organised. They provided framework to share updates related to customs legislation and procedures (including adaptations related to COVID-19 pandemic), and recent developments in trade policy, including FTA negotiations, entry into force of new agreements, and the application of rules of origin in other FTAs and EPAs. The Parties also discussed requirements related to the application of the cumulation of origin under the EU-SADC EPA and practical implementation and interpretation of other provisions, such as a list of products originating in South Africa to which cumulation shall not apply, the annual EU list of GSP duty free quota free products, the applicable proofs of origin and the concept of 'any other commercial document' related to origin declaration. When necessary, the meetings were also used by the Parties to raise concerns, e.g., in relation to the compulsory conformity assessment for electro-technical equipment in South Africa or the use of detailed questionnaires for customs valuation (European Commission, 2019c; 2020d; SCCTF, 2018; 2019; 2020). In 2018, a workshop for capacity building on customs and trade facilitation was held prior to the SCCTF meeting. The Committee later agreed that it would be important for SADC EPA States to incorporate conclusions from it into the National Implementation Plans and to consider them in the context of a future technical assistance (SCCTF, 2018). Also in 2018, the EU side published a guide to the Protocol on the rules of origin (its update was presented in 2022).[67] In 2019, the Committee adopted its rules of procedure and they were published in 2022.[68]

Based on information provided by interviewed stakeholders, cooperation at the technical level in the SCCTF has been good. Meetings have been constructive and provided a framework to exchange information about developments in policy and legislation, discuss interpretation of certain EPA provisions and implementation-related issues. DG TAXUD has provided capacity building on cumulation of origin for customs officials from SADC EPA States to build capacity and improve the understanding and the implementation of the provisions on cumulation. The communication between the Parties has been frequent, including outside the sessions (in form of videoconferences and exchange of e-mails) and also covered exchanges between the EU side and the SADC and SACU Secretariats. It has also been important that trade and customs officials responsible for implementation of customs and trade facilitation-related provisions) have been present at the meetings which has provided an opportunity to address technical (practical) issues. Also in this case, some shortening of time needed for coordination and decision-making might be useful. Overall, however, the SCCTF seems to have positively contributed to the implementation of the Agreement in areas within its mandate.

Special Committee on Geographical Indications and Trade in Wine and Spirits

The Committee has been established pursuant to Article 13 of Protocol 3 on Geographical Indications and Trade in Wine and Spirits. It is tasked with monitoring the implementation

[67] Guide to the Protocol on the rules of origin of the Economic Partnership Agreement (EPA) between the European Union and its Member States, of the one part, and the SADC EPA States, of the other part: https://taxation-customs.ec.europa.eu/system/files/2022-05/3883130_Guide-SADC-EU%20EPA_20220511.pdf

[68] Decision No 1/2022 of the Special Committee on Customs and Trade Facilitation of 27 July 2022 regarding its Rules of Procedure: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A22022D2088

of the Protocol, providing a forum for dialogue on GIs and cooperation, and exchange of updates on changes in laws and regulations. Meetings of this Committee take place between the EU and South Africa only.

To date, the Committee held six meetings, on average one per year. The first few included discussions on the rules of procedure (Committee on GIs and Trade in Wine and Spirits, 2017; 2018), which were formally adopted at the sixth meeting of the Committee in 2022.[69]

The Parties also used the meetings to provide updates regarding their legislation in aspects covered by the Protocol, such as South African GI Regulations, as well as the use of EU funds in support of the South African wine industry (Committee on GIs and Trade in Wine and Spirits, 2017; 2018). They also discussed South Africa's potential engagement in the EU-funded support for the African GI Continental strategy, to share GI-related experience with African peers (Committee on GIs and Trade in Wine and Spirits, 2020), as well as wine quota management, South African requirements on wine labelling with health warnings and the use by the Parties of traditional terms on wine labels, restricted to certain producers (Committee on GIs and Trade in Wine and Spirits, 2018; 2019; 2020).

The Parties also discussed differences in interpretation of certain provisions of the Protocol, such as on winemaking practices (Article 11) and concerns regarding the misuse of some GIs in South Africa, like Aceto Balsamico di Modena, protection of the GI for Feta cheese, and product specifications for other GIs (Cognac and Brandy de Jerez) (Committee on GIs and Trade in Wine and Spirits, 2017; 2018; 2019; 2020; 2021; 2022). The meetings also provided an opportunity to discuss intended changes in the list of protected GIs, such as adding new ones (e.g., South African Rooibos) or modification of the existing ones (e.g., Jamón de Huelva changing its name to Jabugo) (Committee on GIs and Trade in Wine and Spirits, 2019). Moreover, there was a discussion on how to raise awareness of GIs in each other's markets and which processes should be used to update Annex 1 to Protocol 3, listing GIs protected under the Agreement (Committee on GIs and Trade in Wine and Spirits, 2018).

Stakeholders interviewed by the evaluation team considered that the Special Committee has performed well. Exchanges have also been held between formal meetings and when necessary, two workshops on GIs for SADC stakeholders have been held. South Africa has engaged the EU in a discussion about its new legislation on GIs (which has been much appreciated) with a view to ensure its alignment with the relevant provisions of the Agreement. In the part related to wine, there remains one issue of diverging interpretations between the Parties regarding winemaking practices (Article 11 of Protocol 3).

Agricultural Partnership

Unlike the above formal committees, the Agricultural Partnership does not have in its remit the monitoring of implementation of any parts of the Agreement, but its objective is to facilitate an exchange of views between the Parties on agriculture. Article 68 of the EPA mentions in this context, *inter alia*, food security, development, regional value chains and integration. It also states that the coverage of issues and operational rules for the Agricultural Partnership shall be established by the agreement of the Parties acting within the TDC. Moreover, all aspects related to trade in agricultural products between the EU and the SADC EPA States fall outside the scope of the Partnership and are covered either by the TDC (SPS) or the two above-mentioned committees.

[69] Decision No 1/2022 of the Special Committee on Geographical Indications and Trade in Wines and Spirits of 15.11.2022 regarding its rules of procedure: https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/d694a6ab-98aa-4c98-aad8-ee7ab2d63676/details

Three meetings of the Agricultural Partnership have been held to date (in 2018, 2020 and 2022). During those meetings, the Parties discussed the approach to setting the operational rules and the scope of the Agricultural Partnership, including thematic areas for discussion and cooperation. At each meeting, the EU side delivered presentations. These covered the Common Agricultural Policy, climate change, agricultural research and monitoring, the European Investment Plan, cooperation on GIs, technical assistance (TAIEX and twinning programmes), organic production, the European Green Deal, Pan-African Network on Agri-food Policies Analysis, Farm to Fork Strategy, the EU initiatives on global food security and cooperation in international bodies. Based on these, the Parties exchanged views on sectors affected by emission reductions, the new rules on pesticides and the EU marketing standards, as well as the impact of new EU rules on third countries and possibilities for EU support. They have also agreed on the importance of agriculture for jobs, income generation and sustainable development, as well as on importance of ensuring food security and cooperation within international bodies, such as the WTO and FAO (Agricultural Partnership, 2018; 2020; 2022; TDC February 2018). In 2022, the EU proposed to upgrade the Partnership in the future (as part of the EPA review) to a committee. It also expressed interest in hearing about agricultural policies and measures of the SADC EPA States (Agricultural Partnership, 2022).

The specific nature of this forum means a lack of a clear drive or purpose to organise regular meetings of the Agricultural Partnership, set an agenda, prepare materials, or engage in discussions. Indeed, the evidence suggests that while three meetings of this forum have been held so far (all chaired by the EU) and there was some discussion based on presentations delivered by the EU, overall, the structure lacks its own dynamic. It still may be useful and provide a forum to discuss new policies or legislation related to agriculture (e.g., initiatives related to the European Green Deal or EU autonomous measures) which may have an impact on trade between the Parties, and the situation in agricultural exporting sectors in SADC EPA States. Likewise, discussions on needs of the SADC EPA States related to agriculture and the EU financial assistance may be discussed there or there may be consultations on issues that will be later discussed, e.g., at the Food and Agriculture Organization (FAO) or the WTO. That said, the Partnership may require some reform.

Summary of preliminary findings

Overall, the evidence collected to date paints a mixed picture of performance. One positive finding is that all institutions have been set up, their rules of procedure have been adopted and additionally, in 2019, the Joint Council took decisions related to establishment of the dispute settlement mechanism and agricultural safeguards. Meetings have taken place with diverse frequency, depending on the body (e.g., until November 2023, there was only one meeting of the Joint Council and nine TDC meetings, while other bodies met 3-6 times). Across all structures, it has been noted by interviewees that coordination of a position among the SADC EPA States and joint decision making with the EU requires quite a lot of time, irrespective of the nature and complexity of the matter. Reasons mentioned for the sometimes slow progress were the number of countries involved, the operation of the coordination mechanism, complex regional structures (such as Mozambique not being a SACU member), administrative capacity constraints, and the diversity of commitments and priorities across countries. While in relation to some aspects this may not be a major problem, in others it creates a risk that decisions are not taken within the timelines envisaged by the EPA or that EPA benefits are available to the users only with delay. In the remainder of the study, we will identify the already applied good practices and possible other solutions to address it.

With respect to the performance of the Joint Council, although it has taken all the necessary procedural decisions, based on the information available to date the evaluation team considers that its role as a political or strategic guidance and decision-making organisation has been limited. Moreover, while the Council stressed the importance of the participation

of non-state actors in the EPA implementation and holding annual meetings of civil society representatives from the EU and SADC EPA States to discuss it, there was no follow-up to it and as such this way of escalation of the matter to the Council does not seem to have worked.

A similarly mixed performance is found for the TDC. It has played its role in establishing institutional framework and preparing Council's decisions. It has also arrived at outcomes in areas such as indicators for the evaluation framework and provided a forum for regular discussions in a range of aspects related to the EPA implementation and wider trade and economic relations between the Parties. On the other hand, it has been underutilised as an effective instrument to discuss matters related to the EPA chapters not covered by a Special Committee, such as TBT, SPS and TSD: there were no discussions in these areas (even ad hoc ones) monitoring the implementation of the corresponding EPA provisions (SPS issues were raised bilaterally only with South Africa) and a discussion on non-state actors has been ongoing for years without a conclusion. The length of consultations and decision-making process (discussed above) also have their impact. Therefore, there is a room for improvement, notably if the awareness and the use of the EPA increases in the SADC EPA States. Building on a good experience from other Committees, involving the presence of technical experts from other departments (ministries) and agencies could be considered one potential solution, as could be a stronger use of technical working groups.

4.12 Awareness for the EPA

Because major consultation activities that comprise questions on the awareness for the EPA are still ongoing, only very preliminary findings can be presented in this report.

According to feedback received in meetings and interviews with stakeholders, awareness for the EPA appears to be unevenly distributed across SADC EPA States as well as across different types of stakeholders:

- Public sector entities dealing with trade matters appear to be well informed about the EPA in all countries, although some interviewees in trade administering agencies in some SADC EPA States were not always sure about their agency's mandate and responsibilities related to the implementation of the EPA.

- Government entities not directly involved in trade are generally less aware of the EPA, having heard about it but with no knowledge of any details.

- Outside the group of businesses and organisations that are directly involved in trading (and notably exporting), awareness for the EPA appears to be limited; this applies especially to civil society organisations. Likewise, importers and users of imported inputs do not always seem to be aware of the benefits that the EPA provides and/or the requirements that must be fulfilled to make use of the preferences. An example is the fishing sector in Mozambique, which underutilises the preferences granted by Mozambique to imports of inputs from EU, according to information provided by sector stakeholders.

- Knowledge of the EPA seems particularly limited in the two LDCs Lesotho and Mozambique, where the EU's preferential EBA arrangement continues to function and remains the preferred trading arrangement for exporters (also see section 4.2 above).

Stakeholders consulted to date, notably in Mozambique, noted that EPA outreach activities targeting businesses directly have been limited so far.

5 ECONOMIC EFFECTS OF THE EPA

This chapter presents the preliminary findings regarding the economic effects of the EPA, starting with the immediate effects on the Parties' trade in goods (section 5.1), followed by the potential indirect effects on trade in services and foreign direct investment (FDI) – although the EPA does not comprise liberalisation in either area, indirect effects stemming from goods trade liberalisation cannot be excluded (sections 5.2 and 5.3). It then turns to the broader economic impact (section 5.4) before zooming in to the analysis of effects on MSMEs (section 5.5). Effects on the EU's Outermost Regions will be analysed in the draft final report.

5.1 Trade in Goods

5.1.1 Analysis of Trade Trends

In this section, we provide an overview of the Parties' goods trade (both overall and for aggregate sectors) since five years before the EPA started to be implemented to establish trends before and after the start of application of the Agreement. We also compare trends in bilateral trade between the Parties and their trade with selected third countries. It should be noted that this analysis only provides indications for potential EPA effects but by no means conclusive findings, as trade trends are influenced by many factors, of which the EPA is only one.

A more detailed analysis of trade trends is provided in **Appendix B1**. As all other parts of this report, the analysis is preliminary and to be further developed in the remainder of the evaluation.

Trade before and since the EPA

Overall trade between the EU27 and the six SADC EPA partners had stagnated between 2011 and 2016, at about € 41 billion, but **since 2016 increased substantially** – with a drop only in 2020, driven by COVID-19 – to €63 billion in 2022, an increase of 56% compared to 2016. Much of this increase came from EU imports from the partner countries (Figure 4), which increased by 87% over the same period, from €18.9 billion to €35.2 billion; EU exports to the partner countries increased by 29%, from €21.9 billion to €28.3 billion. The EU's bilateral trade balance with the SADC EPA States decreased from a surplus of €8.2 billion in 2012 to €3.1 billion in 2016 – already before the EPA – and then further in the following years, turning into a deficit in 2020 for the first time. This deficit rapidly widened in 2021 and 2022, reaching €6.9 billion.

Figure 4: EU27-SADC EPA State bilateral trade, 2011-2022 (€ billion)

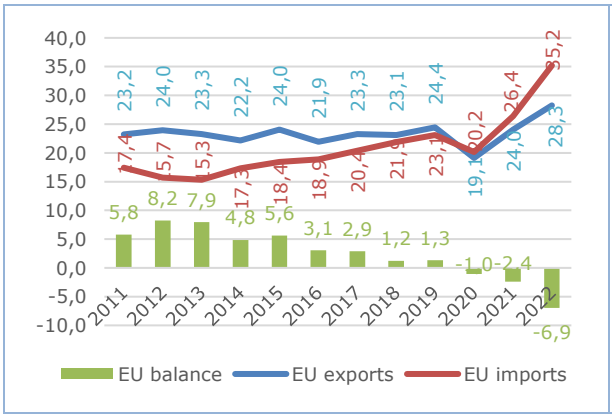
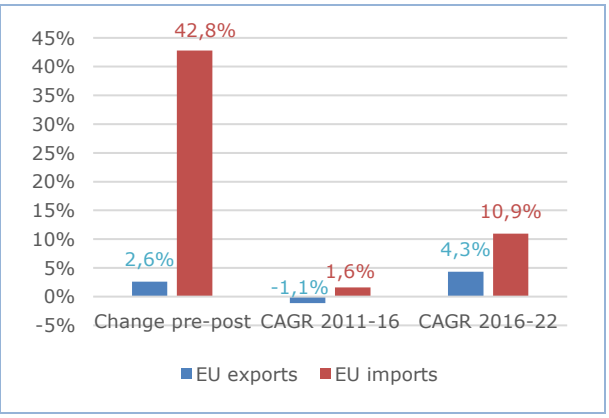


Figure 5: EU27-SADC EPA State bilateral trade, growth rates before and after the EPA's start of application



Source: Own calculations based on Eurostat COMEXT data.

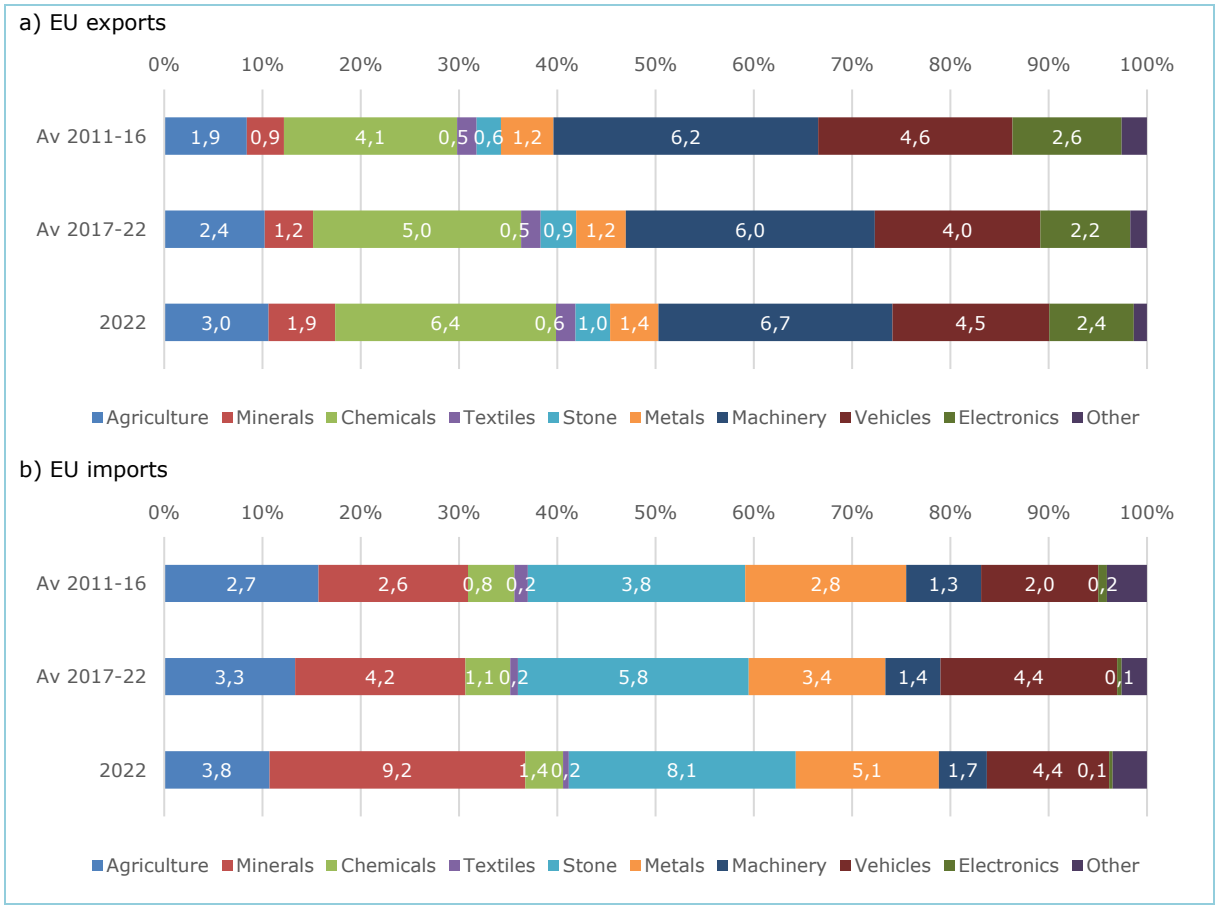
Growth rates in bilateral trade before and after the EPA's start of application further illustrate these difference in performance but also indicate the positive developments for EU27 imports and exports since the EPA started (Figure 5): both average EU exports to and imports from the partners in the EPA period (2017-2022) were higher than in the years preceding the EPA (2011-2016), although this growth was much more limited for exports (2.6%) than for imports (42.8%). But **average annual growth rates** both for EU **exports and imports** were **higher in the EPA period** than before (4.3% for exports after an average annual decline of 1.1% in the years before the EPA, and 10.9% for imports, after 1.6% previously). **This is in line with the expectation that the EPA would encourage bilateral trade.**

Trade between the EU and the six partner countries is roughly proportionate to the relative economic size of the six partners (South Africa accounts for close to 90% of the six countries' combined gross domestic product (GDP), followed by Botswana, Mozambique, and Namibia, each with about 3% of the regional GDP).

By broad sector[70]**, machinery, chemicals and vehicles account for the largest EU exports to the SADC EPA States** – both before the EPA started to be applied and since then (Figure 6a). Comparing the average performance in the years 2017 to 2022 with the pre-EPA period (2011-2016), exports of about half of the sectors grew by up to 50% (stone), but electronics (-15.4%), vehicles (-12.6%), metals (-3.5%), and machinery (-3.4%) decreased. However, much of this decrease is owed to declines between 2011 and 2016, and in fact annual growth from 2016 to 2022 exceeded the performance in the years up to 2016 for virtually all sectors, and all EU sectors except vehicles exported more to the SADC EPA States in 2022 than in 2019 before COVID-19.

[70] For this summary of bilateral trade statistics, broad sectors as defined in Harvard's Atlas of Economic Complexity (https://atlas.cid.harvard.edu/) at the "1-digit level" are used; this distinguishes ten sectors, agriculture, minerals, chemicals, textiles, stone, metals, machinery, electronics, vehicles, and others. Table 28 in Appendix B1 provides the correspondence between HS chapters and broad sectors. Also, **Appendix B1** provides more disaggregated analysis of trade trends between the EU and the SADC EPA States, both combined and for each of the six countries.

Figure 6: EU27-SADC EPA States trade by broad sector, before and since EPA (€ billion)



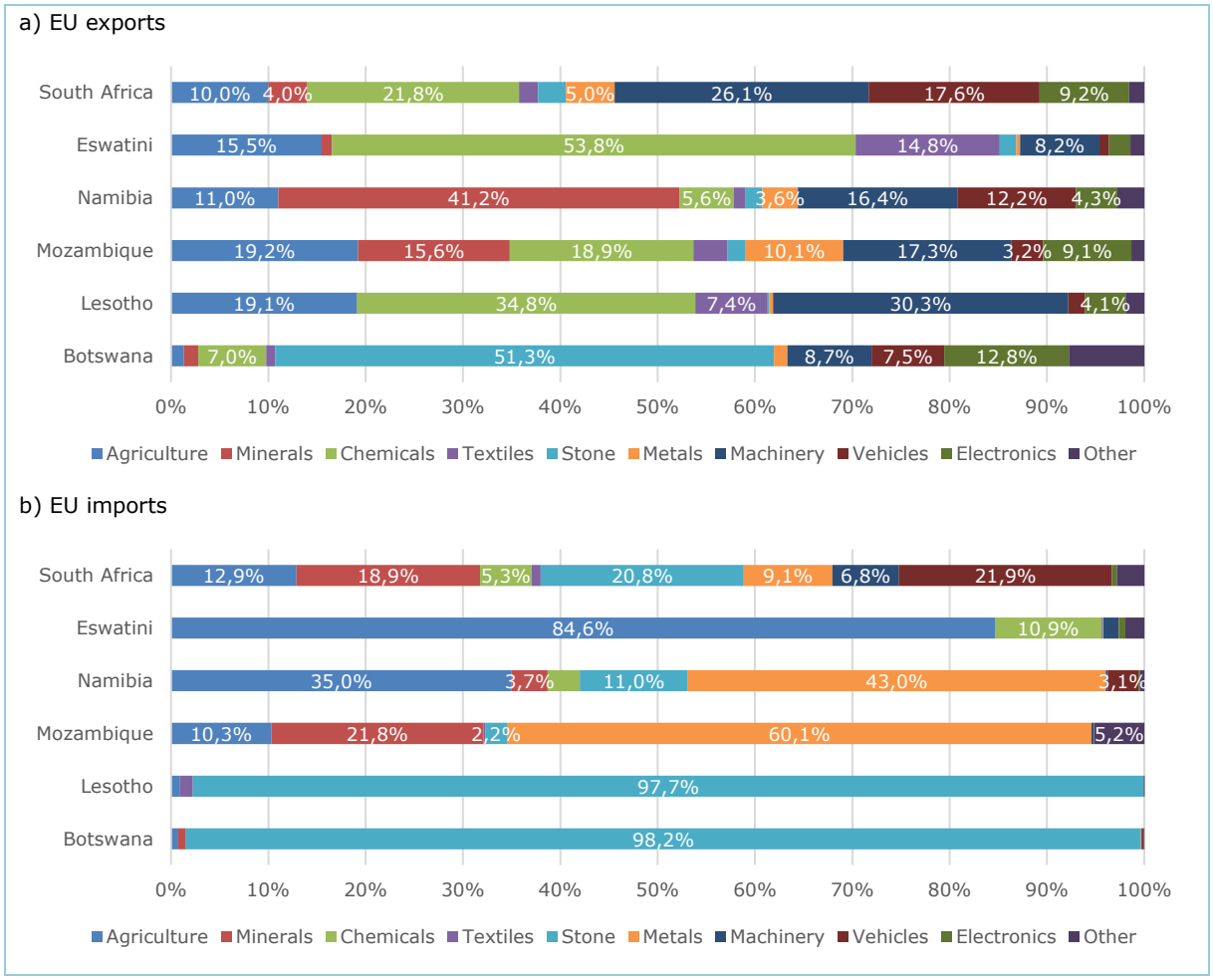
Source: Own calculations based on Eurostat COMEXT data.

EU imports from the SADC EPA States are led by five broad sectors: stone (mostly precious minerals), vehicles, minerals, metals, and agriculture (ordered by average export value over the period 2017 to 2022), all of which saw substantial increases in value when comparing performance in the five years leading up to the start of application of the EPA with the five years thereafter (Figure 6b).[71] Machinery and chemicals also constitute sizable sectors with a stable performance over the years, whereas imports of textiles and electronics are comparatively modest. These last two sectors are also the only ones for which average imports in the period 2017 to 2022 were lower than in the years leading up to 2016; all others saw mostly rapid increases of up to 115% (vehicles). Other sectors that expanded more than the average of 43% are minerals and stone. At the same time, the growth in vehicles imports stalled since 2019, i.e. the rapid growth in vehicles took place until 2019 but then exports stagnated.

Significant differences in sectoral trade patterns exist across the bilateral trade relationships between the EU and individual partners. This is illustrated in Figure 7a, which e.g. shows that EU chemicals exports accounted for between 7.0% (to Botswana) and 53.8% (to Eswatini) of the EU's total exports to the partner country in the years since the EPA started to be applied. Import patterns (Figure 7b) vary even stronger. **Appendix B1** provides a summary of sectoral trade patterns for each of the six bilateral trade relationships covered by the EPA.

[71] Section 4 of **Appendix B1** presents the top 20 products traded between the EU and SADC EPA States.

Figure 7: EU27-SADC EPA States trade by broad sector, annual averages by partner country for EPA period* (% of total bilateral exports/imports)



* 2019-2022 for trade with Mozambique, 2017 to 2022 for all other partners.
Source: Own calculations based on Eurostat COMEXT data.

Trade between the EPA Parties vs total trade[72]

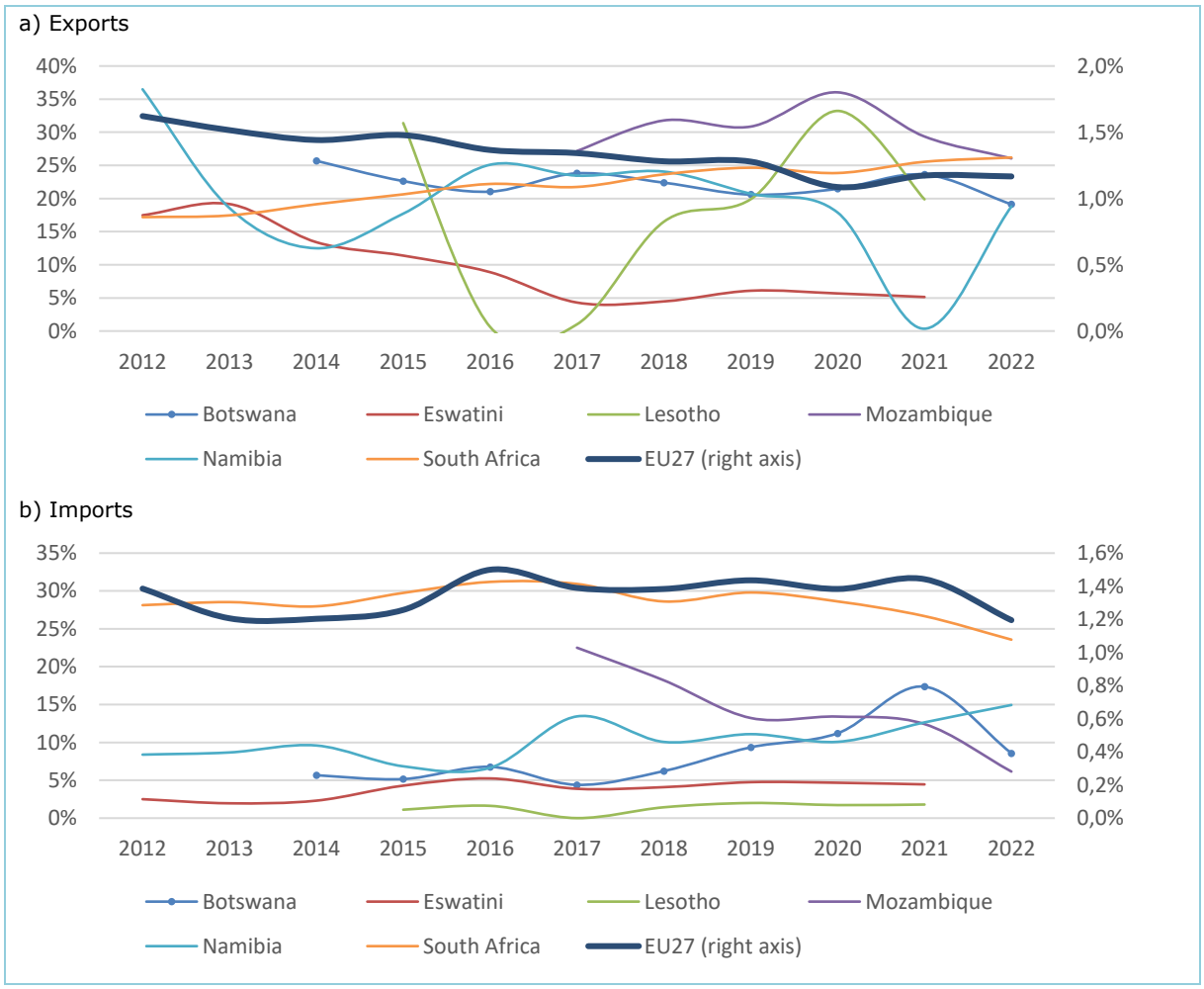
Exports (Figure 8a)**:** The share of EU exports destined to the SADC EPA States has been on a downward trend since before the EPA started to be applied. In contrast, the importance of the EU27 as an export market for the SADC EPA States varies considerably, as does the performance over time: In terms of importance, the EU absorbs between 5% (Eswatini) and about 30% (Mozambique) of SADC EPA States' total exports.

Imports (Figure 8b)**:** For the EU27, the share of imports coming from the SADC EPA States has hardly changed since 2017 but during the EPA period was slightly higher than in most years prior to the EPA: the average share of imports from the SADC EPA States in the EU's total imports from outside the bloc was 1.36% over the period 2017 to 2022, compared to 1.31% in the period 2012 to 2016. The importance of the EU27 as a supplier for most SADC EPA States – except South Africa and Eswatini for most years – is lower than its role as an export market. South Africa used to purchase about 30% of its total imports from the EU before the EPA as well as in its first years. However, since 2019 this share decreased steadily, from 29.8% to 23.6% in 2022. A rapid decrease in imports from the EU also took place in Mozambique, from 22.5% in 2017 to 6.2% in 2022 – unlike other main suppliers,

[72] A comparison of bilateral trade with the SADC EPA States trade with other key trading partners, including by broad sectors, is provided in Section 3 of **Appendix B1**.

such as South Africa, UAE, China, India and Singapore, all of which increased exports to Mozambique,[73] those of the EU27 actually fell; the reasons for that remain to be investigated. In contrast, the EU27 became a more important supplier to Namibia and Botswana. For Eswatini and Lesotho, the EU's share in total imports remained largely stable over time, and limited.

Figure 8: Share of bilateral trade between the EU and SADC EPA States in the Parties' total trade, 2012-2022 (EU27 for each SADC EPA State; SADC EPA States combined for the EU27)



Source: Own calculations based on UN COMTRADE data.

5.1.2 Economic Modelling Results

To isolate the economic impact of the EPA from other factors influencing trade, the EPA has been assessed by developing counterfactual scenarios for the evolution of the economies in the absence of the EPA. These counterfactual scenarios are compared to the actual outcomes to identify the marginal effects of the quantifiable trade barrier reductions under the EPA. For the evaluation, two alternative counterfactual scenarios were developed (see Box 4).

The scenarios were developed using a multi-sector, multi-region computable general equilibrium (CGE) model. The mainstream CGE models used internationally, including by

[73] Mozambique also reports ship imports from South Korea worth €4.6 billion in 2022, which would make Korea Mozambique's largest supplier by far in that year, ahead of South Africa (€2.1 billion), but South Korea's corresponding export data are €2.1 billion in 2021, and none in 2022 (data source: ITC TradeMap).

the European Commission's DG TRADE, are built on the Global Trade Analysis Project (GTAP) database, which incorporates a social accounting matrix (SAM) for each economy represented. Each SAM incorporates the standard national economic account aggregates (i.e., gross domestic production, consumption, investment etc.), a production function for each region-sector showing the labour, capital and land requirements, the input-output structure of the economy, and the bilateral trade flows in goods and services with every other economy/region together with the level of trade protection faced in each market. The changes in a SAM in a simulation thus provide a comprehensive economic picture of the impacts of the trade policy measures being simulated.

The detailed methodology for the CGE modelling as well as the detailed results are provided in **Appendix B2**.

Box 4: Comparators for the EPA in the CGE model: counterfactual scenarios

To simulate the impact of the EPA, the commitments under the EPA are removed as from 2017, and trade between the EU and the SADC EPA partners reverts to the default trade regime in the absence of the EPA. Two specific counterfactual scenarios have been designed.

Scenario A. This is the default scenario which assumes that trade between the Parties would have continued under the regimes in place at the time. Under Scenario A, bilateral trade would thus switch from the EPA to several different regimes for the period 2017 to 2022:

- The EU's exports to Mozambique would be on a most-favoured nation (MFN) basis while exports to all SACU members would take place under the EU-South Africa TDCA.[74] The TDCA liberalises 86% of South Africa's imports from the EU, with exclusion or only partial liberalisation of sensitive products;
- Exports from South Africa to the EU would revert to the TDCA regime, which liberalises 95% of the EU's imports from South Africa, with exclusion or only partial liberalisation of sensitive products, which for the EU are mainly agricultural products;
- Exports from Botswana and Namibia to the EU would be subject to the EU's MFN tariffs;[75]
- Exports from Lesotho and Mozambique to the EU would enjoy EBA tariffs; and
- Exports from Eswatini to the EU would face GSP tariffs.

Scenario B. Scenario B has been defined as an alternative scenario to provide an indication of the "maximum cost of no EPA or other FTA". The rationale for this scenario is that the TDCA was superseded by the EPA. Thus in order to perceive the full benefits of progressive trade liberalisation between the Parties, it is useful to compare to a scenario with no FTA in place. In addition, the TDCA was concluded only between the EU and South Africa and, in the absence of an agreement with the SACU Members other than South Africa, EU exports could have faced MFN duties there. Under Scenario B, the counterfactual trade regimes assumed from 2017 to 2022 are as follows:

- EU exports to all SADC EPA States would have faced MFN tariffs (for exports to Mozambique, no change compared to Scenario A);
- Exports from Botswana, Namibia and South Africa to the EU would be subject to the EU's MFN tariffs (for Botswana and Namibia, no change compared to Scenario A); and
- Exports to the EU from Lesotho and Mozambique would have taken place under the EBA, and from Eswatini under the GSP (no change compared to Scenario A).

Overall trade effects

With regard to the overall trade effects caused by the EPA, the modelling results suggest that the EPA had a positive impact on both the EU's and SADC EPA States' trade.

Under Scenario A, the EPA lowers the trade-weighted tariff facing EU exporters to the SADC parties from 5.74% to 0.5%; at the same time, it reduces the EU trade-weighted tariff on imports from the SADC EPA States from 1.44% to a negligible 0.03%. This reduction is

[74] Although the TDCA was concluded only between the EU and South Africa, de facto (and at least in the case of Botswana also de jure), other SACU members also applied the TDCA on their imports as a result of the SACU CET implementation (see Stevens and Kennan 2007b; 2007a).

[75] Botswana and Namibia (in addition to Eswatini/Swaziland) were included in the GSP on 1 October 2014 but graduated from the GSP as a result of being upper middle-income countries; see Commission Delegated Regulation (EU) No 1016/2014 of 22 July 2014 amending Annex II to Regulation (EU) No 978/2012 of the European Parliament and of the Council applying a scheme of generalised tariff preferences, OJ L 283/23, 27.9.2014.

estimated to have expanded two-way trade substantially between the EU and the SADC partners by about 5.9%.

The aggregate trade impacts for Scenario A are set out in Table 9. The EPA boosts the EU27's exports to the SADC partners by €3.07 billion (8.0%) and raises the level of its imports from the SADC partners by €1.29 billion (3.6%). The impact of the EPA on bilateral exports and imports varies considerably across the SADC partners: for example, Namibia's impact is mostly on its exports to the EU, while Mozambique's and Lesotho's impacts are largely on their imports from the EU. Botswana and Eswatini have more balanced impacts on their trade flows with the EU (although these impacts are quite limited).

Table 9: Changes in bilateral trade caused by the EPA, 2022, Scenario A

	South Africa	Mozambique	Botswana	Namibia	Lesotho	Eswatini	SADC Total
	€ millions at 2022 prices						
EU Bilateral Exports	2,701	275	29	34	24	8	3,070
SADC Bilateral Exports	1,003	8	12	266	1	3	1,292
	Percent						
EU Bilateral Exports	7.7	20.2	5.5	3.0	48.1	4.6	8.0
SADC Bilateral Exports	3.4	0.5	0.4	14.1	0.3	2.7	3.6

Source: Simulations by the European Commission; and calculations by the study team.

Under Scenario B, the EPA impact is substantially greater, reflecting the greater loss in market access under the counterfactual of no EPA, compared to trade being conducted under WTO terms. Two-way bilateral trade expands by €15 billion or just over 20%. The bilateral trade expansion is more balanced under this scenario with EU exports to SADC partners expanding by €8.85 billion or by 23% and SADC exports to the EU expanding by €6.2 billion or by 17%. While the major part of the impact is due to additional trade with South Africa due to the change in the counterfactual from TDCA tariffs to MFN tariffs, the impacts vary for all SADC parties compared to Scenario A, even for those for which there is no difference in the trading status under Scenario B. These impacts reflect trade diversion effects as South Africa makes larger gains due to deeper liberalisation under Scenario B, and also due to stronger terms of trade effects, which impact on the competitiveness of all SADC EPA States. As under Scenario A, the impact of the EPA on exports and imports varies considerably across the SADC partners: Namibia's impact remains mostly on its bilateral exports to the EU while Mozambique's continues to be largely on its imports from the EU.

Table 10: Changes in bilateral trade, 2022, Scenario B

	South Africa	Mozambique	Botswana	Namibia	Lesotho	Eswatini	SADC Total
	€ millions at 2022 prices						
EU Bilateral Exports	8,352	276	81	91	27	21	8,849
SADC Bilateral Exports	5,880	-2	13	273	1	4	6,168
	Percent						
EU Bilateral Exports	23.9	20.3	15.7	8.1	54.2	12.4	23.2
SADC Bilateral Exports	20.1	-0.1	0.5	14.4	0.2	4.0	17.1

Source: Simulations by the European Commission; and calculations by the study team.

Sectoral trade effects

Under **Scenario A**, virtually all **EU** sectors witness an increase in bilateral exports to SADC partners (Table 11). By far the largest increase in bilateral exports for the EU due to the EPA is in motor vehicles and parts. This sector experienced an increase of close to €1.66 billion in exports to SADC partners. Other sectors making strong export gains due to tariff reductions include wearing apparel (a gain of €332 million in additional exports), rubber

and plastic products (€181 million), and leather goods (€102 million). Two services sectors also experience an increase in bilateral exports: commercial services (€166 million) and trade services (€104 million); these gains are due to the EPA-driven income gains in SADC partners as well as the increased bilateral flow of trade.

The majority of EU sectors also see an increase in bilateral imports, although a significant minority see a modest decline due to reallocation of expenditures in the EU towards products benefiting from tariff reductions. By far the largest increase in imports from SADC is in the motor vehicles and parts sector (an increase in imports of €425 million). Other notable sectors seeing an increase in import penetration from SADC sources include sugar (€220 million), prepared foods (€176 million), and vegetables fruits and nuts (€132 million). Trade services imports also rise by €151 million due to the increased trade with the EU and commercial services imports rise by €89 million due to income gains in the EU.

Across **SADC EPA States**, about half of the sectors witness an increase in bilateral exports to the EU (Table 12). However, a significant minority (14 of the 49 sectors in the model) experience small declines in bilateral exports that register at the first decimal point. This reflects the fact that EU tariffs are often zero in the counter-factual scenario where there is no EPA. Accordingly, SADC sectors that do not enjoy a tariff reduction tend to see reallocation of resources to other SADC sectors that do enjoy such reductions. These effects are very small, however.

By far the largest increase in bilateral exports for SADC due to the EPA is in motor vehicles and parts (€415 million). Other sectors making strong export gains due to the EPA include sugar (€207 million), prepared foods (€164 million), and vegetables, fruits and nuts (€112 million). SADC parties also increase their trade services exports to the EU of €151 million, reflecting the increased flow of bilateral trade.

The impact of the EPA on SADC imports mirrors the impacts reported above for EU bilateral exports. Notably, virtually every sector in the SADC economies experienced increased imports from the EU, reflecting the larger and more pervasive tariff shock in the counterfactual scenario where there is no EPA.

The calculated sectoral trade impact in **Scenario B** results is not in broad-brush terms structurally different from the results for Scenario A, but the scale of changes is higher, roughly in proportion to the macroeconomic effects. For example, EU exports of motor vehicles and parts to SADC increases from €1.6 billion or just over 27% under Scenario A to almost €3 billion or almost 49% in Scenario B. EU exports of computer, electronic and optical products, which made minimal gains in the shift from the TDCA to EPA tariffs, make major gains of €867 million or 37% under Scenario B; this is a better indication of the benefits of free trade with the SADC EPA States. A similar picture emerges for SADC exports to the EU. While SADC EPA States (mainly South Africa) make sizeable gains in exports of motor vehicles and parts to the EU under Scenario A (€425 million or 3.9%), the gains soar to €3.6 billion or 33% when the EPA is compared to WTO terms. Similarly, EU imports of metal products under Scenario B are €833 million or 14%, compared to just €84 million or 3.8% under Scenario A. The detailed analysis of Scenario B results, as well as country-specific sectoral results for both scenarios are provided in **Appendix B2**.

Table 11: Sectoral impacts in the EU (€ millions) - Scenario A

EU27	EU Exports to SADC	EU Imports from SADC	EU Total Extra-EU Exports	EU Total Extra-EU Imports	Intra-EU Exports	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value Added % change
1 Rice	0.0	0.0	-0.1	0.2	-0.2	-0.3	-0.6	-0.01	0.023	-0.006
2 Wheat	9.6	0.0	7.0	0.6	-0.6	-0.2	6.2	0.02	0.138	0.025
3 Other Grains	0.3	0.0	0.2	-0.1	-0.8	-0.8	-1.4	0.00	0.118	-0.005
4 Vegetables, fruit, nuts	1.0	132.4	-22.0	96.2	-62.6	-45.5	-130.1	-0.10	0.781	-0.107
5 Oil Seeds	0.1	-0.1	-0.2	0.0	-1.2	-4.0	-5.4	-0.01	0.226	-0.009
6 Sugar	0.3	219.9	-56.8	169.4	-109.4	-169.7	-335.9	-1.13	0.069	-1.102
7 Fibres crops	0.0	0.0	-0.2	0.1	0.0	0.2	-0.1	0.00	0.027	-0.006
8 Other Crops	0.5	0.2	-0.9	2.1	-3.1	-3.3	-7.4	-0.02	0.157	-0.021
9 Cattle	0.7	0.7	0.1	1.0	-0.4	2.4	2.2	0.00	0.531	0.005
10 Other primary	0.0	-0.6	0.0	-0.1	0.1	1.0	1.0	0.00	0.402	0.004
11 Forestry	0.0	0.0	-0.4	0.6	0.0	3.2	2.9	0.00	0.254	0.005
12 Fishing	0.0	3.5	0.0	1.9	-1.9	-1.6	-3.5	-0.01	0.102	-0.015
13 Coal	0.0	-0.1	0.0	2.3	-0.3	-1.9	-2.2	-0.01	0.084	-0.007
14 Oil	0.0	0.0	0.0	3.4	-0.3	-1.9	-2.3	-0.01	0.102	-0.014
15 Gas	0.0	0.1	-0.2	14.4	-1.8	-8.7	-10.6	-0.03	0.164	-0.033
16 Oil products	1.0	-0.2	-1.1	3.7	-0.2	7.5	6.2	0.00	0.081	0.007
17 Electricity	0.6	-0.1	-0.6	2.3	0.1	30.0	29.5	0.01	1.483	0.008
18 Minerals	0.6	-3.7	2.8	4.6	1.7	5.2	9.7	0.01	0.455	0.008
19 Cement	9.3	-0.2	-0.5	6.4	1.3	12.4	13.2	0.00	0.595	0.006
20 Ruminant meat	2.0	9.1	-4.9	9.0	-4.6	-1.0	-10.5	-0.01	0.115	-0.005
21 Other Meat	19.5	0.6	14.5	1.3	0.5	5.4	20.4	0.01	0.234	0.017
22 Vegetable Oils	5.6	0.0	3.6	1.8	-3.8	-4.3	-4.5	-0.01	0.068	0.001
23 Dairy products	4.4	0.1	0.5	1.2	0.1	5.2	5.8	0.00	0.262	0.008
24 Other prepared Food	13.7	176.3	4.8	149.4	-81.6	-53.3	-130.0	-0.02	1.220	-0.012
25 Beverages, tobacco products	4.3	29.1	-3.0	26.0	-11.5	-4.5	-19.0	-0.01	0.617	0.000
26 Textiles	43.4	0.0	31.7	36.4	17.6	74.8	124.2	0.06	0.335	0.067
27 Wearing	332.3	0.6	318.3	55.2	0.3	11.7	330.3	0.20	0.266	0.208
28 Leather	102.2	2.1	88.5	28.4	1.4	12.2	102.1	0.09	0.187	0.097
29 Wood and products	2.0	0.8	-3.5	5.1	-1.1	4.1	-0.6	0.00	0.283	0.002
30 Paper & Paper Products	55.0	-0.3	42.8	7.1	8.0	29.5	80.3	0.02	1.035	0.019
31 Chemicals	46.7	14.4	-15.7	58.9	-12.7	18.1	-10.2	0.00	1.523	0.001
32 Pharmaceuticals	5.6	-0.1	-35.3	21.5	-17.6	-0.1	-53.0	-0.01	1.243	-0.009
33 Rubber and plastics products	181.8	-0.2	157.8	25.5	16.2	53.1	227.2	0.05	0.978	0.051
34 Iron & Steel	2.4	-4.2	-11.6	13.4	5.8	34.7	28.9	0.01	0.548	0.008
35 Metal products	58.0	84.2	12.0	105.8	-36.5	40.2	15.7	0.00	1.793	0.004
36 Computer, electronic, optical products	28.1	0.6	-82.1	70.7	-55.2	-30.0	-167.3	-0.02	1.324	-0.018
37 Electrical equipment	47.8	-0.2	-19.9	58.8	9.9	27.5	17.5	0.00	1.101	0.006
38 Machinery and equipment	82.2	-4.0	-46.2	49.4	-2.0	12.4	-35.8	0.00	2.092	0.000
39 Motor vehicles and parts	1,656.8	424.6	1,370.2	452.5	-172.3	99.1	1,296.9	0.12	1.318	0.126
40 Other transport equipment	-1.6	1.8	-39.5	17.2	-16.6	-10.6	-66.6	-0.02	0.463	-0.019
41 Other Manufacturing	24.4	3.6	-7.3	34.8	-10.4	16.4	-1.3	0.00	1.010	0.003
42 Construction	3.8	0.8	0.1	2.6	-0.3	137.4	137.2	0.01	4.874	0.008
43 Trade services	103.9	151.0	31.1	132.3	-81.0	252.8	202.9	0.00	14.286	0.007
44 Land Transport	0.3	-0.3	-2.5	3.0	1.1	69.4	68.0	0.01	2.718	0.008
45 Water Transport	0.0	0.0	-1.1	4.6	-0.4	1.6	0.0	0.00	0.554	0.016
46 Air Transport	1.3	-2.3	-3.8	4.0	0.9	6.2	3.3	0.00	0.266	0.007
47 Commercial services	165.6	88.5	77.7	129.6	-43.1	338.7	373.3	0.01	23.380	0.008
48 Finance services	54.1	24.5	33.8	36.9	-10.2	77.1	100.7	0.01	4.680	0.009
49 Public services	0.4	-1.2	-12.4	6.0	-0.4	538.9	526.1	0.01	25.435	0.010
Total	3,070.0	1,340.5	1,825.6	1,857.7	-679.0	1,585.3	2,732.0	0.01	100	0.0080

Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

Table 12: Sectoral impacts in the SADC EPA states (€ millions) - Scenario A

SADC	SADC Exports to EU	SADC Imports from EU	SADC Total Exports	SADC Total Imports	Memo: Intra-SADC Exports	Domestic Shipments	Total Shipments	Total Shipments % change	Share of Value Added	Value Added % change
1 Rice	0.0	0.0	-0.1	3.3	0.0	-0.1	-0.2	-0.01	0.100	0.046
2 Wheat	0.0	9.6	-0.2	8.6	0.1	7.1	7.0	0.78	0.101	0.169
3 Other Grains	0.0	0.3	-0.2	2.6	0.8	30.8	30.6	0.89	0.315	0.933
4 Vegetables, fruit, nuts	112.3	1.0	146.1	5.0	2.0	15.8	161.9	1.43	1.237	1.324
5 Oil Seeds	-0.1	0.1	0.0	0.2	-0.1	1.1	1.0	0.07	0.118	0.149
6 Sugar	207.0	0.3	345.1	9.3	4.3	29.7	374.8	4.77	0.256	3.309
7 Fibres crops	0.0	0.0	-0.2	0.6	0.1	0.0	-0.2	-0.12	0.026	-0.096
8 Other Crops	0.2	0.5	-0.1	3.3	0.3	0.1	0.0	0.01	0.046	-0.003
9 Cattle	0.7	0.7	7.1	13.3	7.4	267.9	275.1	1.92	1.233	2.046
10 Other primary	-0.6	0.0	-3.3	0.1	0.0	8.2	4.9	0.12	0.297	0.190
11 Forestry	0.0	0.0	0.8	0.0	0.0	2.9	3.7	0.13	0.213	0.423
12 Fishing	3.0	0.0	2.7	0.3	0.0	62.7	65.4	1.96	0.338	2.469
13 Coal	-0.1	0.0	-7.8	0.0	0.0	7.0	-0.7	0.00	2.071	0.050
14 Oil	0.0	0.0	0.1	4.5	0.0	0.0	0.0	0.05	0.009	0.132
15 Gas	0.1	0.0	5.8	5.7	5.5	-6.0	-0.1	-0.01	0.155	0.425
16 Oil products	-0.1	1.0	-2.0	10.0	0.6	19.1	17.1	0.09	0.234	0.210
17 Electricity	-0.1	0.6	5.3	9.9	7.3	25.8	31.1	0.07	3.729	0.109
18 Minerals	-3.6	0.6	-21.1	9.1	2.5	-33.4	-54.5	-0.07	6.872	-0.031
19 Cement	-0.2	9.3	-0.4	10.5	1.0	-0.2	-0.7	-0.01	0.414	0.092
20 Ruminant meat	8.8	2.0	17.1	1.3	-3.1	9.8	27.0	0.62	0.137	0.780
21 Other Meat	0.6	19.5	-12.7	8.4	-12.9	0.7	-12.1	-0.21	0.229	-0.235
22 Vegetable Oils	0.0	5.6	-0.6	6.8	0.2	32.4	31.7	0.23	0.704	0.284
23 Dairy products	0.1	4.4	-0.1	4.4	0.2	12.3	12.2	0.83	0.049	0.954
24 Other prepared Food	163.7	13.7	149.7	21.2	-2.1	26.9	176.6	2.31	0.670	1.601
25 Beverages, tobacco products	28.0	4.3	40.0	8.2	2.2	43.7	83.7	0.57	0.994	0.618
26 Textiles	0.0	43.4	0.4	10.0	0.4	-35.6	-35.2	-0.63	0.298	-0.208
27 Wearing	0.6	332.3	-47.0	122.4	-52.6	-90.6	-137.6	-2.76	0.272	-2.740
28 Leather	2.0	102.2	-0.5	37.1	-2.1	-15.8	-16.3	-1.22	0.051	-1.129
29 Wood and products	0.7	2.0	0.3	3.3	0.1	3.4	3.7	0.10	0.201	0.201
30 Paper & Paper Products	-0.2	55.0	-7.8	36.8	-2.0	-42.5	-50.3	-0.35	1.025	-0.223
31 Chemicals	13.6	46.7	-8.3	33.0	1.9	-19.1	-27.4	-0.12	1.323	0.039
32 Pharmaceuticals	-0.1	5.6	0.3	11.5	3.0	-1.2	-0.9	-0.02	0.207	0.085
33 Rubber and plastics products	-0.2	181.8	-4.6	100.2	-3.1	-69.4	-74.0	-0.90	0.344	-0.752
34 Iron & Steel	-4.0	2.4	-26.5	11.8	0.2	23.4	-3.1	-0.02	0.307	0.028
35 Metal products	82.6	58.0	-112.1	24.1	-19.2	-14.4	-126.5	-0.25	1.209	-0.088
36 Computer, electronic, optical products	0.6	28.1	-1.3	8.9	-3.0	-0.2	-1.5	-0.02	0.599	0.251
37 Electrical equipment	-0.2	47.8	-15.8	19.5	-11.7	-14.0	-29.8	-0.32	0.301	-0.185
38 Machinery and equipment	-3.9	82.2	-26.2	56.4	-8.5	-44.7	-70.9	-0.47	0.201	-0.415
39 Motor vehicles and parts	415.1	1656.8	824.8	639.0	-9.0	-422.4	402.4	1.35	0.966	2.391
40 Other transport equipment	1.8	-1.6	-58.1	-5.3	0.9	2.5	-55.6	-1.64	0.152	-0.311
41 Other Manufacturing	3.5	24.4	-33.5	17.6	-1.1	-13.5	-47.0	-0.36	0.403	-0.231
42 Construction	0.8	3.8	0.6	2.1	0.0	53.9	54.5	0.10	2.965	0.194
43 Trade services	151.0	103.9	172.6	59.5	-3.3	108.4	281.1	0.24	12.428	0.299
44 Land Transport	-0.3	0.3	-1.1	1.2	0.0	33.9	32.8	0.10	2.323	0.204
45 Water Transport	0.0	0.0	-0.2	0.4	0.0	0.6	0.5	0.04	0.205	0.156
46 Air Transport	-2.3	1.3	-7.5	4.0	-0.4	4.4	-3.2	-0.03	0.343	0.017
47 Commercial services	88.5	165.6	128.4	107.4	-1.5	-50.5	77.9	0.04	15.105	0.129
48 Finance services	24.5	54.1	31.0	41.4	-1.3	17.9	48.8	0.08	6.452	0.147
49 Public services	-1.2	0.4	-5.3	2.4	-0.1	370.3	365.0	0.14	31.773	0.209
Total	1292.5	3070.0	1473.7	1491.0	-96.3	349.2	1822.9	0.15	100	0.2394

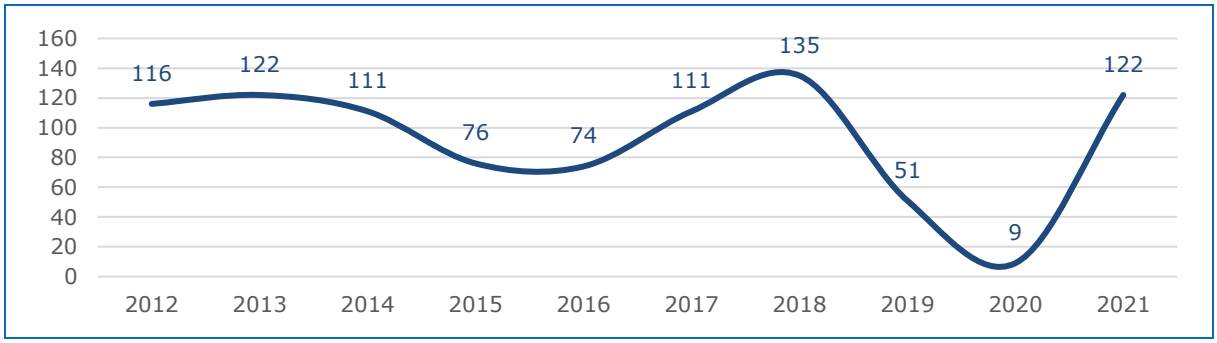
Source: Simulations by the European Commission; and calculations by the study team. Note: the data for labour represent the total expenditure in the sector for labour = employment times wages.

5.2 Trade in Services

The EPA does not currently cover services trade liberalisation, apart from a rendez-vous clause on possible future negotiation. And indeed negotiations started but without making much progress. At the 4th TDC meeting held in November 2018 both Parties agreed to resume negotiations on trade in services, but no substantive progress was made to date, despite some meetings between the parties on the issue. Nevertheless, in view of an expected stimulus for bilateral goods trade and closer bilateral economic relations it is possible that services trade between the Parties would also benefit.

Historically, the services sector has been a significant export revenue earner for the EU. On average, while remaining positive, the services trade balance dropped by 14% from EUR 99.8 billion (2012-2016) to EUR 86 billion (2017-2021), largely driven by the impact of covid-19 in sectors such as transport (Figure 9).

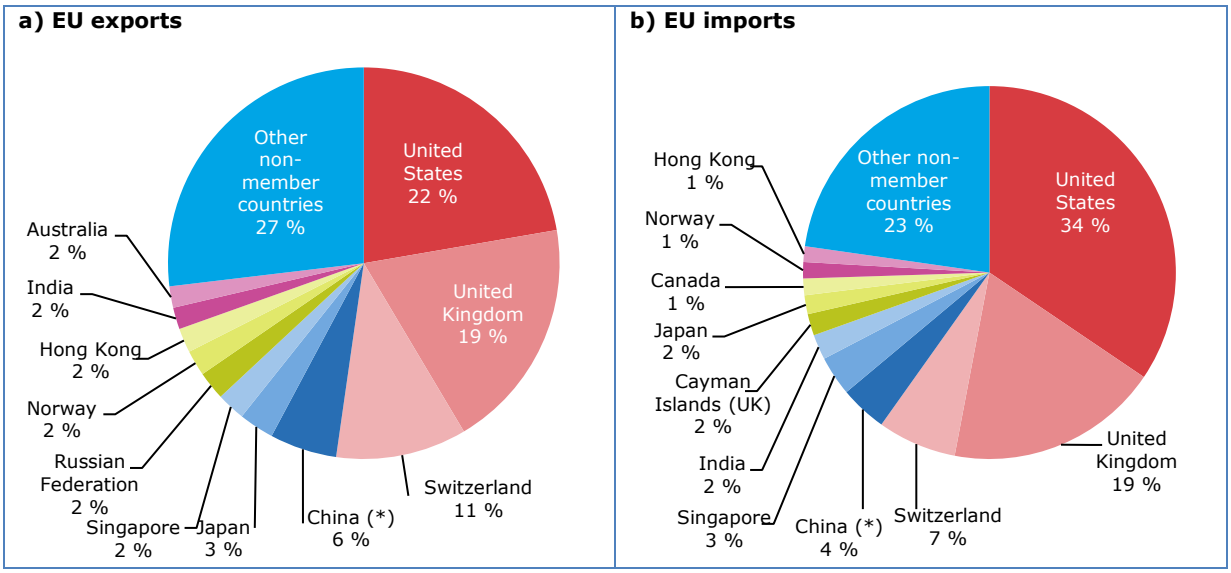
Figure 9: Extra-EU services trade balance, 2012-2021 (€ billions)



Source: Eurostat (2023)

In 2021, the services sector accounted for 73% of the gross value added, followed by industry (25.1%) and agriculture, forestry and fisheries (1.8%). The EU is the world's top trader of services with exports and imports in 2021 accounting for 25% and 24%, respectively. The main services sectors traded by the EU are other business services (technical, professional, research and development, and others); telecommunications, computer and information services; and transport services for both imports and exports (WTO Secretariat 2023a). Both imports and exports of services are heavily concentrated in the top three trading partners – the United States, the UK, and Switzerland – accounting for over 50% of extra-EU trade in services in both directions (Figure 10).

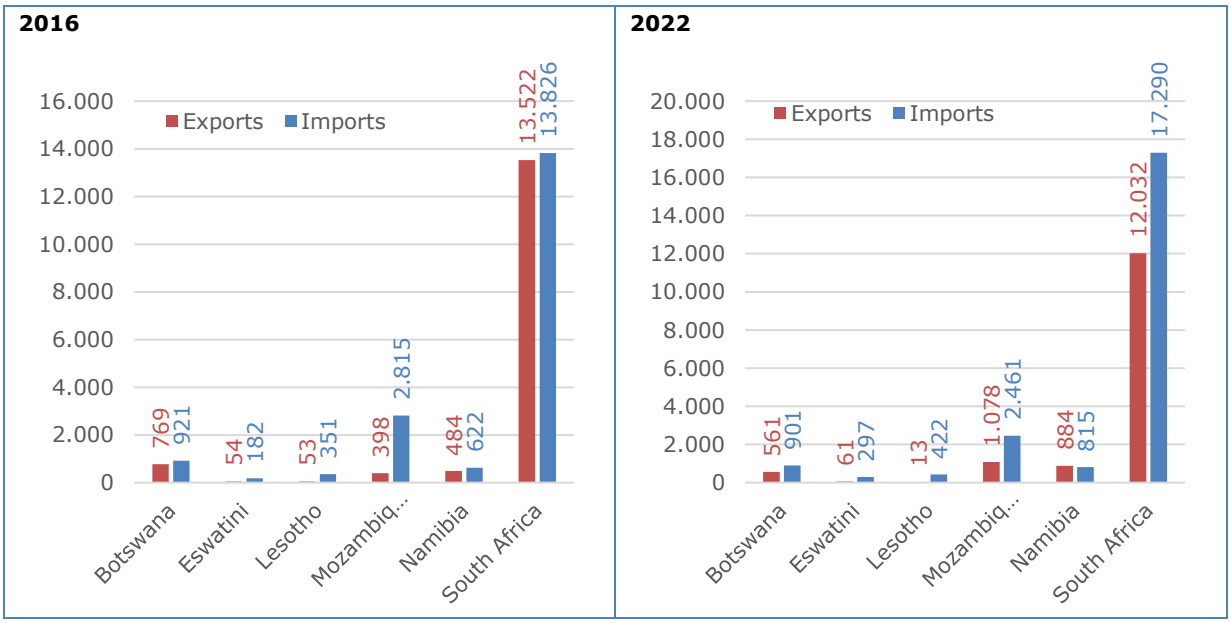
Figure 10: Extra-EU services trade by partner economy, 2021 (% of total exports/imports)



Source: Eurostat (2023)

The SADC EPA States mostly have had consistent services trade deficits over time: in 2016, all six of them had a deficit, whereas in 2022 Namibia registered a narrow surplus (Figure 11). In value terms, SADC EPA States' services exports developed in different ways: those of Mozambique and Namibia increased strongly, exports by Botswana and South Africa contracted substantially – mostly in response to a sharp drop of exports during covid-19 (due to the virtual disappearance of tourism) and a recovery that had not yet been completed in 2022; and exports by Eswatini and Lesotho were highly volatile year-on-year over the period. Conversely, for all SADC EPA States except Botswana and Mozambique services imports increased over the same period.

Figure 11: Services trade of SADC EPA States, 2016 and 2022 (€ million)



Source: ITC TradeMap.

Bilateral services trade between the EU and the SADC EPA States is comparable in magnitude to goods trade and increased from about €10.6 billion in 2016 to €12.6 billion in 2021, despite a sharp drop in the COVID-19 years 2020 and 2021 (the latest years for which bilateral services trade data are available. Table 13 provides the developments for

each SADC EPA State. This indicates that both EU services exports to and imports from most SADC EPA States increased until 2019 but then dropped sharply. It also indicates that the EU has a persistent bilateral services trade surplus with most partners except Namibia.

Table 13: EU27 services exports to and imports from SADC EPA States, 2011-2021 (€ million)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
EU27 exports											
Mozambique	347	406	350	408	774	561	419	458	509	591	771
Botswana	129	111	110	116	125	101	104	99	154	136	128
Lesotho	8	8	15	8	10	9	10	15	10	5	7
Namibia	149	231	175	156	174	134	147	165	201	174	166
South Africa	4,788	4,824	4,703	4,552	5,862	5,601	6,175	6,986	7,737	6,894	7,932
Eswatini	142	70	75	50	63	94	88	93	110	88	159
EU27 imports											
Mozambique	153	158	204	239	262	176	272	227	242	161	171
Botswana	61	74	85	75	60	94	104	92	132	52	42
Lesotho	3	5	8	31	3	4	17	56	1	2	0
Namibia	221	292	299	385	270	364	475	594	387	172	227
South Africa	3,168	3,029	3,412	3,235	3,485	3,379	3,965	4,408	4,645	3,229	2,954
Eswatini	23	14	67	31	24	60	24	19	51	15	25

Source: Eurostat, International trade in services (since 2010) (BPM6)

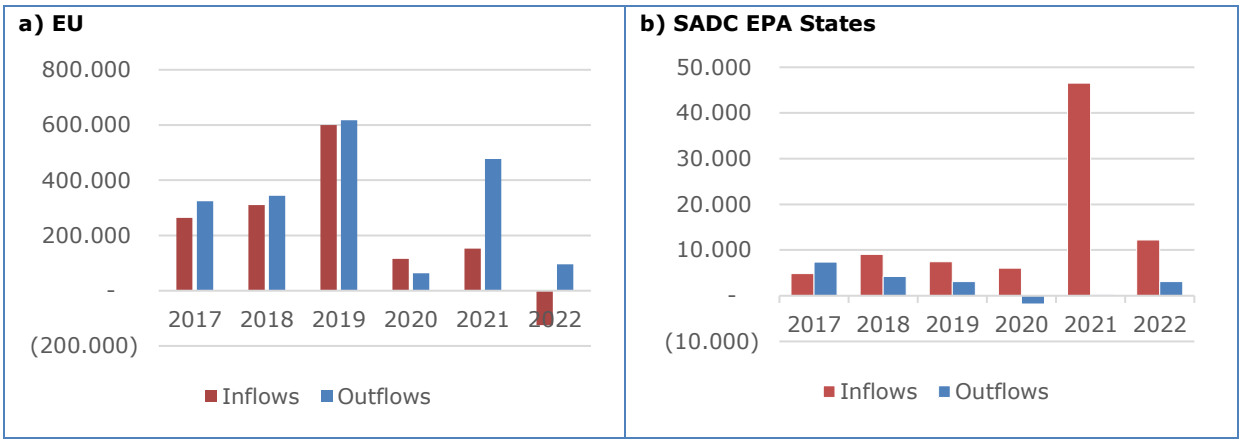
When comparing developments over time in the EU's bilateral services trade with the SADC EPA States with the EU's total service trade, the EU exports have roughly followed the same trends: total EU services exports increased by 35% when comparing the averages in the years 2017 to 2021 with those in the period 2011 to 2016; for EU exports to the SADC EPA States, the growth was 37%. Accordingly, the share of SADC EPA States in the EU's total extra-EU27 exports remained constant, at 0.8%. Regarding EU services imports, SADC EPA States underperformed: their growth rate was 16% (again comparing average EU imports in 2017 to 2021 with those in 2011-2016) compared to 43% for the EU's total services imports; in line with this, the share of SADC EPA States in the EU's total extra-EU services imports dropped from 0.6% to 0.5%. The impact findings of the CGE modelling results discussed in section 5.1.2 suggest that the drop in services exports from the SADC EPA States would have been even stronger in the absence of the EPA, but one question that remains to be analysed further is whether the inclusion of services trade in the EPA would have led to a stronger performance of such exports to the EU.

5.3 Foreign Direct Investment

Similarly to trade in services, although the EPA does not currently cover investment issues, apart from a provision that this may be negotiated in the future, it was expected to have an indirect positive impact on investment due to the permanent preferential access it offers to the EU market for exports from the SADC EPA region (and vice versa), as well as cooperation focused on improving the business climate.

Over the period 2017-2022, the EU has been both an important global source and receiver of FDI; on average, outflows over the period were at USD 100 billion but changes year-on-year were high, with the effect of the covid-19 pandemic and other global crises clearly visible: FDI flows in both direction sharply increased until 2019, but then sharply dropped in 2020 and becoming volatile thereafter (Figure 12a). Volatility also drastically increased for FDI flows to the SADC EPA States, which were net receivers of FDI at USD 11.6 billion across the six-year period: however, both FDI inflows to and outflows from the SADC EPA States started to decline already since 2017/2018 (Figure 12b).

Figure 12: EU and SADC EPA State FDI flows, 2017-2022 (USD millions)

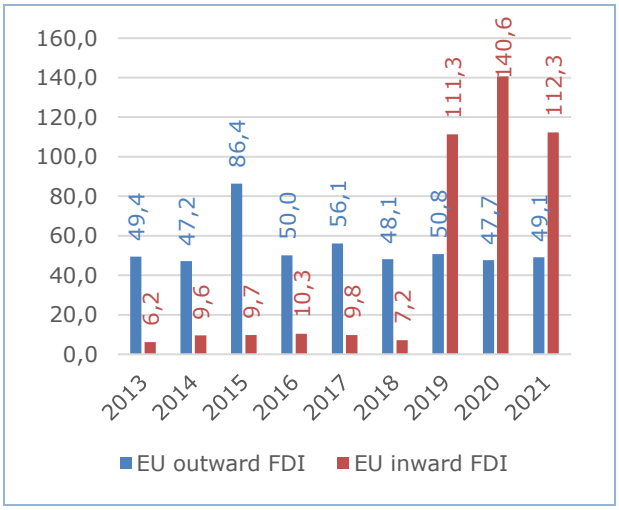


Source: UNCTAD (2023), World Investment Report

With regard to bilateral FDI flows, at this stage of the evaluation only some summary statistics and anecdotal findings are presented. Further analysis based on SADC EPA State sources remains to be done in the remainder of the evaluation.

EU FDI in the partner countries was fairly stable over the years, at about €49-50 billion (Figure 13), making the EU the most important foreign investor in the region; from the EU-perspective, FDI in the SADC EPA States in 2021 accounted for 0.5% of total outward FDI (outside of the EU) – the same share as in 2016 –, and 24.1% of the EU's FDI in Africa, up from 21.7% in 2016. Conversely, inward investment from the SADC EPA States, which had been below €10 billion until 2018 massively increased in 2019, to €111 billion, and then further to €141 billion in 2020, before dropping again to €112 billion in 2021; the source of these changes remains to be identified. In any case, the rapid increase means that whereas FDI in the EU from the SADC EPA States accounted for only about 0.1% of the EU's total inbound FDI in 2016, this number had jumped to 1.5% in 2021. And the region accounted for 36.4% of total FDI in the EU from Africa in 2016, which increased to 78.6% in 2021.

Figure 13: EU net FDI stock in SADC EPA States, 2013-2021 (€ billion)



Source: Own calculations based on Eurostat data, EU direct investment positions by country, ultimate and immediate counterpart and economic activity (BPM6)

In South Africa, the biggest recipient of FDI inflows from the EU (creating an estimated 350,000 direct jobs in the country), the EU accounted for 40% of total FDI in 2018; and 1,055 EU companies were present in the country by the end of 2019, according to the EU Chamber of Commerce and Industry in Southern Africa (2022), Following Anheuser Busch-InBev's acquisition of SABMiller in 2016, which was valued at above €90 billion, new EU investments were announced over the period 2017-2019 ranging from €350 million to €3.3 billion (e.g. Mercedes Benz, BMW, as well as some investors in relation to the South African Renewable Energy Independent Power Producer Procurement Programme).[76] The EU is South Africa's largest investor and trading partner, and EU companies have contributed

[76] European Union, Annual Info Sheet on the Implementation of the SADC-EU EPA 2019

substantially to economic transformation in South Africa (EU Chamber of Commerce and Industry in Southern Africa 2022).

While some sectors receiving FDI inflows are export-oriented and beneficiaries of the EPA preferences, others are not. It would seem impossible to think that EU investments in the automotive sector would have been as high in the absence of the EPA, considering the market access preferences that the EPA provides. On average, the EU has also been an important source of Mozambique's FDI inflows despite the significant drop from about USD 146 million or 17% of total (2015-2018) to about USD 45 million or 10% of total (2019-2022) (APIEX, 2023). Some of the recipients were the extractive industry, transport and logistics and agriculture sectors – but no evidence could be identified of a relationship between these FDI inflows and EU-bound exports.

Furthermore, in May 2023 the Government of Namibia and Hyphen Energy, a German firm, signed an agreement for a project worth USD 10 billion to produce green hydrogen, a clean source of energy, which would enable the production of tons 2 million of ammonia – used to produce renewable energy sources i.e. energy and solar power; more details on this project will be analysed in a case study.

As a reflection of the very limited scope of investment under the EPA, no specific investment issues were raised by the Parties in the meetings of the EPA's institutions. But despite the limited scope of investment under the EPA, **the Parties have unilaterally adopted and implemented policy and legal measures with an impact on FDI flows**. On the EU side, FDI (investment from EU Member States to third countries) is governed by the Treaty on the Functioning of the European Union, and based on the principle of free movement of capital (and payments), except, *inter alia*, with restrictions for public policy, public security, health reasons, or other overriding reasons in the general interest, as recognised by EU jurisprudence. Intra-EU investments are covered additionally by the freedom of establishment. Some key FDI-related policy and legal measures adopted by the EU include (WTO Secretariat 2023a):

- Investment liberalisation commitments in about half of its trade agreements and under its most recent trade negotiations, covering both services and non-services sectors, market access and non-discrimination obligations, and other investment-related provisions such as the prohibition of performance requirements. In these agreements, the EU has listed reservations notably with respect to the establishment and operation of investments. These reservations vary across EU Member States and affect different sectors of activities (e.g., agriculture, real estate, distribution, cultural, energy, and transportation).

- Investment facilitation commitments, either as part of wider trade agreements (e.g., with countries of the Eastern and Southern Africa configuration) or as standalone sustainable investment facilitation agreements (e.g., with Angola). Investment facilitation commitments focus on practical measures to improve the attraction, expansion and retention of investments, such as increasing the transparency of investment-related measures, and streamlining administrative procedures.

- The Global Gateway Investment Strategy 2021-2027, which aims to support smart, clean and secure links in the transport, energy and digital sectors through which a milestone of USD 150 billion Africa-Investment Package was announced at the EU-African Union summit in February 2022 and committed by late 2023.[77]

[77] https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/stronger-europe-world/global-gateway_en [accessed on 02 October 2023]

- The adoption in March 2019 of a regulation to establish a common framework for the screening of FDI for reasons of security and public order. This regulation started applying on 11 October 2020, and provides for (i) a set of minimum requirements for the functioning of national screening mechanisms and for a cooperation mechanism to share information, and (ii) guidelines to identify FDI that is likely to affect security or public order and therefore should be screened.

In view of these developments, it seems plausible to expect the EU willingness to negotiate a stronger or deeper investment component under the EU-SADC EPA in the near future with clear provisions on investment facilitation. However, at the 4th Meeting of the EU-SADC EPA TDC held in November 2018 the SADC EPA States stated that they were not yet ready to commence negotiations on areas such as investment. No indication of a change in this position has so far been identified by the evaluation team.

SADC EPA States have been collectively and individually implementing FDI-related policy measures with a potential impact on FDI inflows from the EU. A key regional development was the approval and starting of implementation of the SADC Programme to Support the Investment and Business Environment (2019-2024) through which the following milestones have been achieved:

- the elaboration of the first SADC Investment Climate Scorecard, its report is planned to be published by end 2023; and
- Review of the SADC Finance and Investment Protocol (FIP) in 2022,[78] following which Senior Officials from SADC Member States recommended *inter alia,* the need to (i) enhance the effective domestication of regional frameworks, (ii) ensure that capacity building initiatives undertaken at the national levels should take place at an institutional rather than individual level, and (iii) strengthen the Monitoring, Reporting and Evaluation functions of the FIP to ensure adequate monitoring and reporting.[79]

On the other hand, EU investors in South Africa "have a strongly negative perception of the current investment climate" (EU Chamber of Commerce and Industry in Southern Africa 2022). In relation to this, it is noted that since around 2015 South Africa began cancelling Bilateral investment Treaties (BITs) with some EU Member States. Investor protection was then covered by the Protection of Investment Act, which however provides less protection for international investors than the BITs, according to stakeholders. In the remainder of the evaluation, analysis will be added to determine if and how the exclusion of investment from the EPA may have led to detrimental effects on investment protection and/or facilitation in SADC EPA States.

5.4 Overall Economic Impacts

5.4.1 Macroeconomic Effects

Macroeconomic effects of the EPA were analysed using the CGE model introduced in section 5.1.2. Under the model's Scenario A, which compares the EPA with a situation in which the TDCA would have continued, the increase in trade caused by the EPA contributes to a positive impact on real GDP (on the order of 0.0018% for the EU but sixteen times that for SADC at 0.029%).[80] Economic welfare improved as a result, both within the EU and across the SADC EPA States as a whole. Overall, the EPA contributes to making the EU a more

[78] The FIP seeks to foster harmonisation of the financial and investment policies of the State Parties in order to make them consistent with objectives of SADC and ensure that any changes to financial and investment policies in one State Party do not necessitate undesirable adjustments in other State Parties.

[79] SADC Secretariat: https://www.sadc.int/latest-news/senior-officials-sadc-discuss-finance-and-investment-protocol [accessed on 30 September 2023]

[80] For a summary description of the economic model and the scenarios, see section 5.1.2 above; for details, see **Appendix B2**.

open economy with two-way global trade expanding by about 0.013%. The increase in real GDP is consistent with this degree of increased openness: the ratio of real GDP gains to increases in trade volumes is about 0.14, which is well within historical experience. Indeed, all things considered, the estimated real economic gains are likely understated and the price responses overstated. In short, these gains are conservative estimates of the benefits of the EPA.

Table 14 sets out the impacts on economic welfare and on real GDP for the parties. The impacts on the SADC partners vary widely, reflecting the differences in the incidence of tariffs under the no-EPA scenario. All parties experience an increase in real GDP, with a few of the gains being relatively strong (Lesotho's gain of 0.14% and Mozambique's of almost 0.11%). The welfare gains are less consistent as negative terms of trade impacts offset the gains in real economic activity for Mozambique, Lesotho and Eswatini. The aggregate SADC gain is €452 million. For the EU27, the welfare gain is about €543 million.

Table 14: Impacts on economic welfare and real GDP, 2022, Scenario A

	EU27	South Africa	Mozambique	Botswana	Namibia	Lesotho	Eswatini	SADC Total
Economic Welfare (€ millions)	**543**	293	-10	19	149	2	0	**452**
Real GDP (% change)	**0.0018**	0.025	0.108	0.021	0.075	0.140	0.043	**0.029**

Source: Simulations by the European Commission; and calculations by the study team.

Comparing the EPA with a situation where no trade agreement between the Parties would have been present (Scenario B), the stronger trade expansion in this Scenario contributed to real GDP gains that are 37% larger for the EU (a gain of 0.0025%) and almost 50% greater for the SADC EPA States combined (a gain of 0.044%), compared to Scenario A (Table 15). Economic welfare improved as a result of the EPA, both within the EU (an increase by €593 million, only slightly more than in Scenario A) and across the SADC region (an increase by €1.6 billion, substantially higher than in Scenario A).

Table 15: Impacts on economic welfare and real GDP, 2022, Scenario B

	EU27	South Africa	Mozambique	Botswana	Namibia	Lesotho	Eswatini	SADC Total
Economic Welfare (€ millions)	**593**	1,507	-16	2	124	-4	-13	**1,599**
Real GDP (% change)	**0.0025**	0.042	0.103	0.006	0.087	0.183	0.092	**0.044**

Source: Simulations by the European Commission; and calculations by the study team.

More details are provided in **Appendix B2**.

5.4.2 Output and Value Added – Sectoral Impacts

In this section, we analyse the effects of the EPA comparing it to the situation that would have prevailed if the TDCA had continued (**Scenario A**); as for all other modelling results, the reported numbers refer to the difference between the EPA and the counterfactual in 2022. Scenario B results are not structurally different from these results, but the scale of changes is higher, roughly in proportion to the trade and macroeconomic effects. The detailed analysis of Scenario B results, as well as country-specific results for both scenarios are provided in **Appendix B2**.

The impact of the EPA on production in the **EU** (see Table 11 in section 5.1.2 above) varies by sector, depending not only on the direct trade impact of the EPA but on the extent to which the increased bilateral exports and imports displace trade with other countries, including within the EU itself, and also on domestic sales driven by the income gains from the EPA. To illustrate the importance of taking these various effects into account, the computer, electronic and optical products sector made modest bilateral export gains (€28

million) and witnessed only modest import penetration from SADC suppliers (€0.6 million) as a result of the EPA. However, due to rising real wages in the EU, exports to third parties declined, resulting in a decline in total exports to the world of €82 million, a decline in intra-EU exports of €55 million, and a decline in domestic sales of €30 million. The net result was a decrease in the value of shipments to all destinations, domestic and foreign, of €167 million. By contrast, the auto sector converted its major gain in bilateral exports of €1.66 billion into an increase in total sales of €1.3 billion, while the apparel sector converted its bilateral export gain of €332 million into an almost equivalent gain in total shipments of €330 million given limited import penetration from the SADC partners and a modest increase in intra-EU exports and domestic shipments driven by the income gains in the EU.

The EU sectors that experience the largest gains in total sales were those that built on their export gains to SADC EPA States with additional sales in the EU. In addition to autos and apparel, these include rubber and plastics products which realised a total gain of €227 million in sales compared to bilateral export gains to SADC partners of €182 million; textiles, which added to the €43 million in additional bilateral exports a strong gain in intra-EU exports and domestic sales to enjoy a net gain of €124 million; and the leather products sector which consolidated its export gains to SADC partners of €102 million to expand total sales by the same amount. However, in addition to sectors that made gains due to bilateral trade liberalization, a number of services sectors substantially increased their total output due to the income gains from the EPA. These include public services (an increase in output of €526 million), commercial services (which build on the €166 million bilateral export gain to increase total sales by €373 million) and trade services (which double their bilateral export gains of €104 million to raise total sales by €203 million). Construction services and financial services, which make little in the way of bilateral export gains also increase total sales by over €100 million through stronger domestic performance.

A number of EU sectors experienced an overall decline in total sales as bilateral imports from SADC EPA States displaced either intra-EU exports or domestic sales. Sectors experiencing a decline in total sales were sugar (€336 million, reflecting mainly increased import penetration from SADC of €220 million and reallocation of expenditures within the EU to other products benefiting from EU tariff reductions); the aforementioned computer, electronic and optical products (a decline of €167 million); the vegetables, fruits and nuts sector which saw a decline in total sales of €130 million, mostly driven by increased imports from SADC partners of €132 million; and prepared foods, which experienced a similar reduction in total sales of €130 million due to increased SADC EPA imports of €176 million.

Overall, the EU experienced a gain in total sales across all sectors of €2.7 billion, compared to the total export gains to SADC of €3.1 billion. The sectors making the largest gains in value-added in percentage terms were apparel (an increase in value-added of 0.21%), motor vehicles and parts (0.13%) and leather (0.097%). Other sectors making notable gains in percentage terms are textiles (0.067%), rubber and plastics (0.051%), and wheat (0.025%). Of the declining sectors, the only one which was palpable in percentage terms was sugar, where value-added declined by 1.1%. As noted above, this was only partially attributable to increased import penetration. The only other sector with a notable percentage decline in value added was vegetables, fruit and nuts (-0.11%).

In the **SADC EPA States** (see Table 12 in section 5.1.2 above), sectors that significantly expanded bilateral exports also dominate the leader board for total shipments due to the EPA. These include automotive (€415 million in exports to the EU and €402 million in total shipments) sugar (€207 million and €375 million respectively); prepared foods (€166 million and €177 million respectively); and vegetables fruits and nuts (€112 million and €162 million respectively).

Equally importantly for the SADC EPA economies are the gains in economic output that are made in sectors that do not enjoy significant bilateral export gains due to EU tariff reductions under the EPA but do enjoy strengthened domestic demand from the income effects of the EPA. For example, the cattle sector expands exports to the EU by only €0.68 million but total sales by €275 million. Similarly, non-traded sectors benefit in terms of increased output despite no direct liberalization effect from the EPA. Notable gains are made by public services (which expands by €365 million) and construction (€54 million). Trade services, which do increase bilateral exports to the EU (by €151 million), experience much greater expansion of sales overall due to the stronger domestic demand (total sales increases of €281 million).

A number of sectors in SADC EPA States experienced an overall decline in total sales as increased penetration of bilateral imports displaced domestic sales. These sectors are primarily in manufacturing. The apparel sector experienced a decline in total sales of €138 million, reflecting mainly increased import penetration from the EU of €332 million. Metal products experienced a decline of €126 million reflecting a combination of increased bilateral imports of €58 million, reduced domestic demand of €14, and reduced global competitiveness due to the higher real wages induced by the EPA, which contributed to an overall decline in global exports of €112 million despite an increase of bilateral exports to the EU of €83 million. Rubber and plastic products saw a decline in total sales of €74 million, mostly driven by increased imports from the EU partners of €183 million. Machinery and equipment experienced a similar reduction in total sales of €71 million due to increased bilateral imports of €82 million. Other sectors that witnessed modest declines in total sales due to increased penetration by EU imports include paper and paper products, other manufacturing, textiles, electrical equipment and chemicals.

At the same time, the stronger impact of the EPA on SADC EPA economies results in larger structural change across the economy as gaining sectors draw productive resources away from declining sectors, as internal demand for intermediate inputs shifts, or as sectors lose ground in other international markets due to the higher real wages induced by the EPA. For example, other transport equipment, which experiences a marginal decline in imports from the EU and thus is not impacted by increased import penetration under the EPA, still sees an erosion in total sales of €56 million due mainly in this case to reduced global exports of €58 million. Similarly, the minerals sector, which is minimally impacted by the EPA directly, experiences a decline in total sales of €55 million due to a combination of reduced global sales and reduced domestic demand from structural change in the SADC EPA economies.

Overall, the SADC EPA States experienced a gain in total sales across all sectors of €1.8 billion, of which €1.4 billion came from increased total exports (mostly accounted for by increased bilateral exports to the EU of €1.3 billion) and increased domestic shipments of €349 million driven by the income gains generated by the EPA in the SADC EPA economies.

The sectors making the largest gains in value-added in percentage terms are mainly in the food and agriculture sectors. These include sugar (a gain in value added of 3.3%), fishing (2.5%), cattle (2%), prepared foods (1.6%) and vegetables, fruits and nuts (1.6%). Motor vehicles and parts was the industrial sector reaping the greatest benefit from the EPA in terms of expanded value-added (a gain of 2.4%). The sectors seeing the largest declines in value-added are all manufacturing sectors: apparel (-2.74%), leather (-1.1%), rubber and plastics (-0.75%), machinery and equipment (-0.42%), other transport equipment (-0.31%), other manufacturing (-0.23%), paper and paper products (-0.22%) and textiles (-0.21%).

5.4.3 Government Revenues

The government revenue impacts of the EPA reflect multiple factors: the change in tariffs on bilateral trade, the induced change in the flow of bilateral trade, the extent of trade diversion from or towards third parties, and the indirect impact on non-trade taxes due to changes in the level of consumption and income.

Using the CGE model results as the basis, the preliminary analysis of government revenue effects indicates that the reduction of tariffs due to the EPA reduces revenues on bilateral trade for five of the six SADC EPA States (Table 16). The sole exception is Lesotho, whose case illustrates the Laffer Curve principle, which is that a reduction in the tax rate can increase revenue.[81] In Lesotho's case, the tariff reduction on wearing apparel from 53.6% to 15.65% under the EPA increased imports of apparel sufficiently to boost total revenue from tariffs on bilateral trade from about €3 million to over €4.5 million.

Table 16: Tariff Reduction Impacts on SADC EPA State Government Revenues, Scenario A (€ millions)

	South Africa	Mozambique	Botswana	Namibia	Lesotho	Eswatini
Bilateral tariff revenues - EPA	95.8	18.1	1.74	7.72	4.53	0.07
Bilateral tariff revenues - no EPA	518.2	45.7	3.14	9.26	2.98	0.18
Difference (EPA induced)	**-422.5**	**-27.6**	**-1.40**	**-1.54**	1.55	**-0.11**

Source: Simulations by the European Commission; calculations by the study team

Taking into account the change in the level of GDP in value terms, given the relationship between general government revenues and the value of GDP, the EPA-induced changes to economic activity induced a large positive impact on general government revenues in Botswana and Namibia, more than sufficient to offset the loss of tariff revenues on bilateral EU-SADC trade (Table 17). In South Africa, the positive impact on general government revenues was not sufficient, however, to offset the large loss of tariff revenues on bilateral trade. For Mozambique and Eswatini, the impact on general government revenues was negative, exacerbating the impact on bilateral tariff revenues. Lesotho, meanwhile, experienced a modest decline in government revenues due to the EPA but not enough to offset the gain in revenues from the tariff liberalisation.

Table 17: EPA Impacts on SADC EPA States' General Government Revenues, Scenario A (€ millions)

Country	General Government Tax Share of GDP	Value of GDP Change	Implied General Revenue Impact	EPA-induced Bilateral Tariff Impact
South Africa	26.6	195	52.0	-422.5
Mozambique	27.0	-27	-7.3	-27.6
Botswana	29.6	18	5.3	-1.4
Namibia	32.0	293	93.8	-1.5
Lesotho	47.1	0	-0.2	1.5
Eswatini	26.8	-5	-1.2	-0.1

Source: General government tax share of GDP from the IMF, World Economic Outlook, October 2023; figures are averages for the period 2016-2018.

[81] The Laffer Curve illustrates the relationship between tax rates and tax revenue. At low tax rates, increasing the tax rate can increase revenue. However, beyond a certain point, further increases in tax rates reduce total revenue, as they discourage economic activity and tax compliance. In a trade context, increasing a low tariff rate increases tariff revenue, but as is clear from a prohibitive tariff, if the tariff is raised sufficiently high, it will result in no trade and hence no tariff revenue. While the concept is associated with Arthur Laffer, the basic principle was articulated by numerous economists going back to Adam Smith and even earlier.

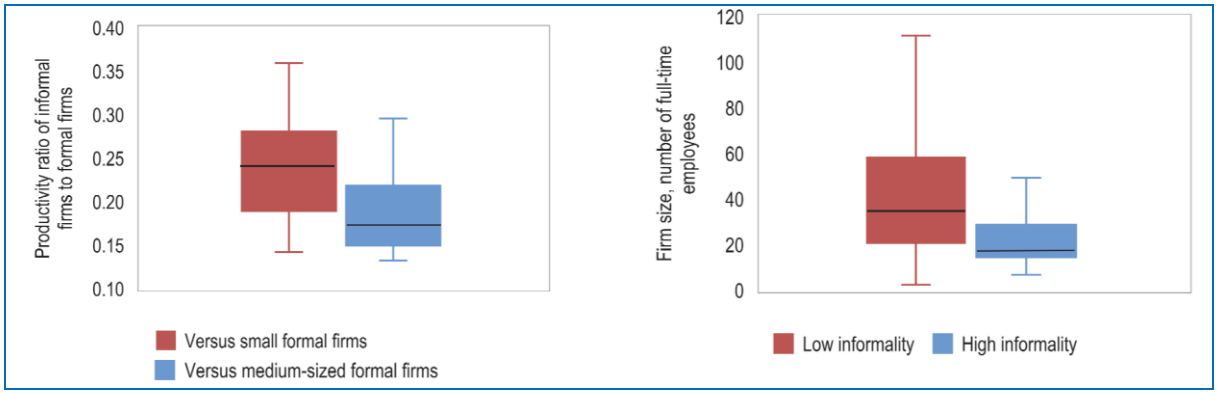
5.5 Effects on MSMEs

Micro, small and medium enterprises (MSMEs) in the SADC region account for over 2 million companies, or over 98% of formal businesses (UNCTAD 2023). Taking into account informal businesses, the number is substantially higher at perhaps 3.3 million (Mastercard 2023). A high share of MSMEs also operates in the informal sector (also see chapter 6 below).

MSMEs and informal enterprises tend to be formed by individuals out of necessity, reflecting high rates of unemployment and scarcity of job offers from larger enterprises: more than 60% of those who start an informal business do so because they are unemployed and have no alternative source of income (MasterCard 2023). Moreover, many potential formal businesses remain in the informal sector, limiting their capacity to access capital, to grow, to create jobs and to engage in trade for a multiplicity of reasons which trade agreements alone do not address. These include, inter alia, low levels of financial inclusion, tax administration requirements that disincentivise formalisation (e.g., registration for collection and remittance of value added tax, VAT), regulatory requirements that are triggered by formalization, and so forth. These considerations apply a fortiori to youth- and women-owned MSMEs and informal enterprises.

Increasing the share of the economy in the formal sector is critical for economic development. World Bank Enterprise Survey data suggest that informal firms on average, are only 25% as productive as small formal firms and 19% as productive as medium-sized firms (Figure 14, first chart). One reason is that informal firms are much smaller (Figure 14, second chart) and hence have less scope for the internal specialization of functions, which is a major source of productivity improvement.

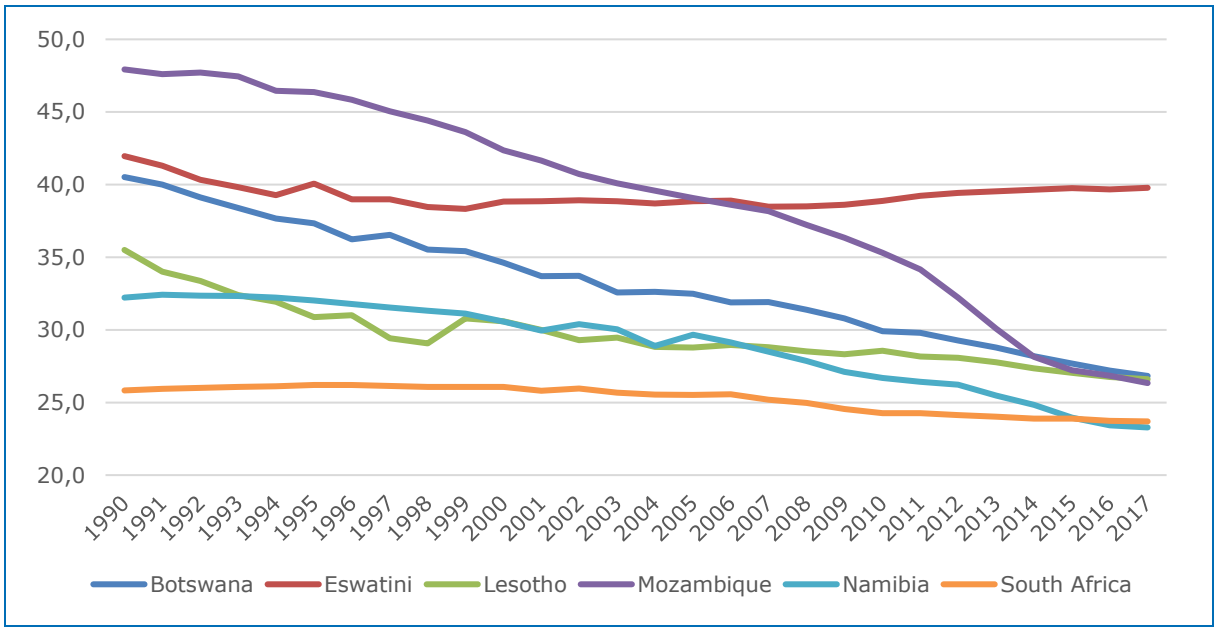
Figure 14: Informality and Productivity, and Firm Size



Source: IMF, Regional Economic Outlook: Sub-Saharan Africa, Figures 3.9 and 3.10; at 55.

While Africa ranks high in the world in the share of GDP accounted for by the informal sector, the SADC region ranks towards the lower end of the spectrum. Apart from Eswatini, all the SADC economies are in the 20-30% range according to World Bank estimates (the OECD average is about 17%). Moreover, apart from Eswatini, there has been impressive improvement in reducing the share of economic activity in the informal sector in the region (see Figure 15). This suggests that the SADC region has been successful in reducing the barriers to formalisation.

Figure 15: Informal Sector Share of GDP, SADC Economies, 1990-2017



Source: World Bank, Informal Economy Database, https://www.worldbank.org/en/research/brief/informal-economy-database

Turning to the question of the impact of the EPA, it is not possible to provide direct estimates of its impact on MSMEs and the informal sector. Most international trade is accounted for by larger firms (a consistent finding from the modern firm-level empirical trade literature); informal firms, meanwhile, are not directly captured in economic statistics and their activity is estimated rather than measured. However, it is possible to draw some inferences from the structural impacts of the EPA as drawn out in the CGE model simulations.

First, in general, trade liberalisation has a positive impact in terms of growing the formal economy, i.e., by lowering the barriers to trade, it induces firms to take the steps to formalize and to scale up to serve foreign markets. There is a statistically significant negative relationship between the share of the economy accounted for by informal activity and the openness of an economy to trade – more open economies have lower informal shares of GDP. Since the EPA contributes to the openness of the SADC region, it contributes to the formalization of informal firms and the scaling up of MSMEs, both of which have very significant benefits in terms of improving productivity. Notably, the ILO encourages pursuing various policies to induce entry into trade, including export promotion, providing advisory services for MSMEs to develop their exporting capacity, and encouraging their inclusion into the value chains of exporting sectors (ILO 2014; 2015).

Second, the income gains generated by the EPA drove sectoral expansion in both traded and non-traded sectors, many of which feature a concentration of MSMEs and informal firms. MSMEs and informal firms tend to be most represented in agriculture and fisheries, small-scale mining, and small-scale manufacturing (e.g., artisanal handicrafts). In services, they are most represented in sectors such as construction, land transport, and retail trade as well as various personal and recreational services ranging from mini-bus taxis, beauty and hair salons, repair services, and local tourism-related services. Such firms are also present in the informal financial services sector through savings and credit groups or "stokvels" that serve clients who don't have access to formal banking services. Notably, these sectors generally do well under the EPA, which favours agricultural and fisheries sectors in the SADC EPA States and also boosts the non-traded services sectors (Table 18).

That being said, the EPA does not tend to favour manufacturing in the SADC region, including in two areas that have been traditionally MSME territory, wearing apparel and leather goods (Table 18). Accordingly, the EPA has not been an unequivocal boost for all MSMEs and the informal sector in SADC; but on balance, it has been positive.

Table 18: Effects of the EPA on output of SADC EPA State sectors with high incidence of MSMEs (Scenario A)

	Total Shipments € millions	Total Shipments % change
Goods		
Cattle	275.06	1.92
Vegetables, fruit, nuts	161.91	1.43
Fishing	65.39	1.96
Vegetable Oils	31.73	0.23
Ruminant meat	26.98	0.62
Dairy products	12.21	0.83
Services		
Trade services	281.06	0.24
Commercial services	77.88	0.04
Construction	54.45	0.10
Finance services	48.83	0.08
Land Transport	32.83	0.10
Negatively Impacted		
Wearing Apparel	-137.56	-2.76
Leather	-16.28	-1.22

Source: Simulations by the European Commission and calculations by the study team.

6 SOCIAL EFFECTS OF THE EPA

The analysis of social effects of the EU-SADC EPA comprises a large range of areas and indicators, including effects on employment, wages and poverty, on informal employment,[82] consumers, women, and corporate social responsibility and responsible business conduct (CSR/RBC). To avoid duplication and overlap, impacts on the pillars of the Decent Work Agenda – child labour, forced labour, freedom of association, non-discrimination at work, occupational safety and health and working conditions – are addressed in the chapter on human rights and labour rights. Effects on employment, wages and poverty are also relevant for the analysis of human rights effects, in particular regarding the right to an adequate standard of living (see section 8.1 below).

This interim report covers the first three elements of the social impact analysis, i.e. the EPA's effects on employment, wages and poverty (section 6.1), women (section 6.2) and consumers (section 6.3), and CSR/RBC practices (section 6.4). Other effects will be reported on in the draft final evaluation report.

6.1 Effects on Employment, Wages and Poverty

European Union

The **economy-wide effects** of the EPA are too small to have generated any broad-based effects on employment, wages and poverty in the EU.

At the **sector level**, the CGE model estimates a shift of employment away from the sugar sector by -1.1% and vegetables, fruit and nuts by -0.1%, when comparing the EPA with the situation that would have prevailed in a continuation of the TDCA (scenario A).[83] On the positive side, higher employment resulting from the EPA is registered in apparel (+0.2%), leather (+0.1%), motor vehicles (+0.1%), and textiles (+0.1%). Changes estimated for other sectors are very limited.

The negative effect of the EPA on employment in the EU sugar sector has to be seen against a long-term negative employment trend in the industry: Employment in the sugar industry has been decreasing since 2006 (European Parliament, 2018). The number of direct jobs engaged in sugar production (seasonal and permanent) more than halved between 2006 and 2022: it decreased from 52,000 in 2006 to 28,675 in 2017-2018 (21,368 permanent and 7,307 seasonal) and further to 24,083 in 2021-2022 (18,635 permanent and 5,448 seasonal) since the EU sugar policy reform in 2017. In 2021-2022, the highest number of jobs in the EU sugar production were recorded in Germany (5,558), France (5,532) and Poland (4,704) (CEFS, 2023; CEFS, EFFAT, 2022). The number of sugar beet growers (for EU27 and the UK together) also fell from 133,878 in 2017-2018 to 100,442 in 2022-2023[84] (data shared with the study team by CIBE). Additionally, the sugar industry in La Réunion (one of EU Outermost Regions) provides 18,300 direct and indirect jobs on the island, with a population of around 800,000 (Syndicat du Sucre de la Réunion, 2021). Finally, according to Scholz et al. (2019) every job in a sugar factory supports 14 other jobs along the EU supply chain (in 2017, there were 338,500 such jobs).[85] Further analysis of the EPA's

[82] Effects on informal businesses have been addressed as part of the impact analysis on MSMEs, see section 5.5 above.

[83] For results on wages and sectoral employment effects estimated under scenario B, see the tables in **Appendix B2** and **Appendix C2**.

[84] According to the UK National Farmers Union, in 2021, there were 2,500-3,000 sugar beet growers in the UK (NFU, 2021). This would mean that the EU27 has close to 98,000 sugar beet growers.

[85] According to the same source, that multiplier effect for automotive industry equals 4.4 jobs supported by one job in the industry (Scholz et al., 2019).

effects on the sugar sector will be provided in a case study, as part of the final evaluation report.

SADC EPA States

At the **economy-wide level**, in aggregation across the six SADC EPA States the EPA led to an increase of real wages of about 0.2% compared to the situation with the TDCA (scenario A) and about 0.6% compared to the MFN situation (Table 19); in both scenarios, wages for unskilled workers benefitted more than those for skilled workers, thus contributing, in a limited way, to a reduction in inequality. However, the impact varies substantially across Partner countries: Positive effects are strongest in Namibia (up to 1.1% wage increase for unskilled workers) and Mozambique (up to 0.4% increase for skilled labour; the only country where skilled labour benefits more than unskilled labour). Effects in South Africa are close to the aggregate, which is unsurprising given the size of South Africa's economy in relation to the other SADC EPA State. Wage effects were limited in Lesotho, Botswana and Eswatini were limited, and in Eswatini negative.

Table 19: Wage effects of the EPA in SADC EPA States, 2022

	ZAF	MOZ	BWA	NAM	LSO	SWZ	SADC
Scenario A							
Real wage unskilled labour (% change)	0.207	0.335	0.072	1.136	0.139	-0.133	0.225
Real wage skilled labour (% change)	0.186	0.425	0.061	0.313	0.110	-0.189	0.186
Scenario B							
Real wage unskilled labour (% change)	0.701	0.223	-0.012	0.999	-0.040	-0.276	0.641
Real wage skilled labour (% change)	0.639	0.327	-0.025	0.302	-0.053	-0.368	0.570

Source: Simulations by the European Commission; and calculations by the study team.

Aside from the macro-effects, the EPA has had substantial effects for some **sectors in SADC EPA States**, as outlined in the remainder of this section.[86]

Botswana

The economic model estimates the largest employment creation in sectors including sugar (0.5%), cattle (0.8%), ruminant meat (1.9%), other meat (0.5%), and other manufacturing (2.3%); other agricultural sub-sectors also generally benefit. On the other hand, it suggests negative employment effects in sectors including textiles (-1.8%), apparel (-2.3%), leather (-0.7%), rubber and plastics (-0.5%), and motor vehicles (-1.5%); both positive and negative effects are slightly larger when comparing the EPA with the situation under which the Parties would have traded under WTO rules (scenario B). Labour impacts in services sectors are limited but mostly positive in scenario A, but mostly (slightly) negative in scenario B.

Regarding the sugar sector, the sources identified to-date (FAOSTAT, no date; Hess et al., 2016) do not list Botswana among sugarcane growing countries. However, there are jobs in sugar packaging and distribution facilities in Lobatse, near the border with South Africa (Tongaat Hulett, no date). This will be investigated further in a case study.

The cattle sector covers commercial and traditional holdings, the latter often meaning smallholder farms focused on subsistence. Over the last decade, the number of traditional cattle holdings has been decreasing gradually, from 72,116 in 2012 to 29,355 in 2019. Some of them also employ farm labourers. In 2012, 19,886 livestock holdings (including also goats and sheep farms) employed in total 22,243 farm workers, out of whom 20,590 (92.6%) were permanent and 1,653 were temporary. Over time, those numbers also went

[86] We mostly report results for scenario A, except where differences between the two scenarios are large; full results for scenario B are presented in the tables in **Appendix C2**.

down and in 2019, 13,191 livestock holdings employed 14,894 farm workers, out of whom 13,426 (90.1%) were permanent and 1,472 were temporary. Older statistics also include data for commercial holdings (809 in 2012) focused on market production, including for exports (Statistics Botswana 2020; 2016). The literature suggests domestic factors being behind the traditional sector's decrease, including severe droughts and animal diseases causing cattle deaths, as well as ageing of the farmers' population and a low engagement of youth in the sector[87] (Statistics Botswana, 2020; 2016; Okechukwu Uchendu et al., 2021). Employment data for commercial holdings could not yet be obtained. However, given the importance of the EU as one of the destination markets for Botswana's beef exports (around 30%) (ITC Trade Map) one can assume that exports to the EU have contributed to maintaining the existing and potentially creating new jobs in the sector. Moreover, given that most farm workers (in traditional holdings) are permanent and receive on average wages that are higher than the statutory minimum wage (Statistics Botswana, 2020), their jobs are also likely to have helped in poverty reduction.

Regarding sectors identified in the economic modelling as negatively affected by the EPA, employment in the textile sector increased from 2,702 in 2005 to 2,791 in 2010 (i.e., before the start of the EPA implementation); in the apparel sector, it declined from 7,319 to 4,651 in the same period (Statistics Botswana, 2012).[88] Developments in both sectors have been closely linked with exports to the United States under the AGOA scheme. While Botswana benefitted from it in early 2000s, the period of growth was followed by a decline in exports following the 2008 financial crisis (Motswapong, Grynberg, no date). Moreover, in the following years, exporting firms started moving to Lesotho which offered generous incentive schemes. As a result, Botswana's exports to the United States fell from USD 4.8 million in 2016 to USD 3,000 in 2018 and have been gradually replaced by exports to South Africa, Namibia, Zambia, and Zimbabwe. More recently, the Government and the private sector have launched a few tenders and other initiatives to place orders with local producers (e.g., for school or corporate uniforms) to revive both sectors and to support jobs (Mguni, 2019; Sekgweng, 2023). One can, therefore, conclude that while the textile and apparel sectors have been facing challenges and suffered from job losses, the reasons have been largely related to factors other than the EPA.

Eswatini

The economic model estimates a limited job creation in coal mining (1.1% for unskilled workers and 1.2% for skilled ones), wood products (0.6% for both groups), chemicals (0.7%), iron and steel (0.5%), metal products (0.8%), and commercial services (0.5%); small gains are registered across most agricultural and manufacturing sectors. On the other hand, increased imports from the EU and a fall of Eswatini's exports to other SADC EPA States are estimated to have triggered a fall in production and a shift of workers out of the textile (-1.7%), apparel (-6.1%) and motor vehicles sectors (-3.2%).[89] Most services sectors also see limited losses, in both scenarios. For agricultural and manufacturing sectors, in contrast, results differ considerably. When comparing the EPA with trade under WTO rules, the EPA's benefits have generally been substantially higher, or losses smaller (than in scenario A) for most manufacturing sectors except wood & wood products, rubber and plastics, and motor vehicles, but a number of agricultural and food industry sectors

[87] In 2019, only 5.3% of traditional farmers were below 35 years of age while 47.3% were in the group of 55 years and above (Statistics Botswana, 2020). While it is possible that young people worked on farms owned by older family members, the evidence suggests the lack of incentives for the youth to stay in the traditional agriculture. Therefore, at least in some sectors, like livestock farming, agricultural activity may attract fewer young people than other sectors and contribute less to unemployment reduction among the youth.

[88] The more recent employment statistics provide data for the manufacturing industry as a whole; therefore, it is not possible to analyse longer-term trends for the two chosen sectors.

[89] Regarding motor vehicles sector, to-date, we have not identified any evidence regarding production capacity in Eswatini in the sector. Hence, the absolute effects estimated by the economic model are likely to be very limited.

would have been better off in the absence of the EPA, including cattle, dairy and other prepared food.

The available evidence related to the coal and iron sectors suggests that there have been recent efforts to revive mining activity in Eswatini. The Mpaka Coal Mine has been closed since 1992 but a new license for its operation was granted in 2022. The beneficiary company estimated the time needed for feasibility studies to be 24-36 months. If the operations start, the mine may create jobs for local workers, including young people. Iron ore has not been mined since 2014. In 2022, preparatory works began at Ngwenya to restart exploring the mine. Additionally, Eswatini has been extracting anthracite (a type of coal used in the steel and metallurgical industry) since 1993 and exporting it to South Africa (Steenkamp, 2023; WhyAfrica, 2021). Exports proceed from mines in Shiselweni and Lubombo regions. They fluctuated prior to and after 2016 in value and volume without a clear trend. The mining company used to employ 500 workers. Since a management change in 2021, it has invested in infrastructure, a new equipment and employed 142 additional workers. Further expansion may create even more jobs in regions suffering from high unemployment (The Bridge, 2022; Times of Eswatini, 2022; Mbingo, 2023), with jobs likely to be formal. It is to be determined yet if the EPA has contributed to this expansion through increased production in and exports of motor vehicles or metal products from South Africa.

In the sugar sector, employment changes are found primarily in scenario B (0.5% employment increase). However, sugar plays an important role in Eswatini's exports to the EU and SADC EPA States (even if exports to the EU declined over the last few years, influenced at least partly by changes in the EU sugar market policy and the abolition of preferential prices). Smallholder growers provide 29% of the total sugar cane production, while the rest comes from mill-owned estates (50%), large-scale growers (14%) and medium-sized ones (7%) (USDA, 2023). Out of 489 sugar cane growers, 450 (i.e., 92%) are smallholder farmers. The sector provides in total around 20,000 direct and indirect jobs, out of which 16,000 are in growing and milling (IFC, 2022). Further details are to be studies and reported on as part of the case study on the sugar sector.

Regarding the sectors where the model estimates an outflow of workers, the evidence suggests that exports from the textile and apparel sector have been growing over the last decade, with South Africa taking the previous place of the United States as the first destination market. Eswatini's exports to South Africa increased from USD 95 million in 2011 to USD 230 million in 2021. The sector employs 22,000 persons, out of whom 95% are women. Jobs are formal. The main setback in the last few years – resulting in significant job losses, from 32,000 to 17,000 – was when the United States suspended preferential access to its market for products from Eswatini between 2015 and 2018 (IFC, 2022).[90] The textile sector in Eswatini may have also suffered from side effects of South Africa's 2021 regulations on a rebate which were aimed at strengthening local sourcing at the expense of textile imports from East Asia (University of Manchester, 2022). These challenges affecting the textile and garment sectors in Eswatini compound the effects of the EPA.

Lesotho

The economic model estimates a limited employment creation in textiles (1.7%) related to increased exports to other SADC EPA States and increased production for the domestic market. On the other hand, increased imports from the EU and a fall in Lesotho's exports to other SADC EPA States are calculated to have negatively affected jobs in sectors including apparel (-1.3%), leather (-1.8%), motor vehicles (-3.9%), and other transport

[90] There was also a fall in exports in 2020 due to the COVID-19 pandemic, but they recovered in 2021. According to UN COMTRADE data, exports to South Africa increased from USD 122 million in 2011 to USD 255 million in 2021, with total exports increasing from USD 199 million to 257 million.

equipment (-0.7%).[91] Comparing the EPA with trade under WTO rules (scenario B) shows stronger effects of the EPA, with relatively strong gains for some manufacturing sectors – electrical equipment (+1.6%), textiles (+1.2%), and metal products and iron & steel (+1.0% each) – but also some stronger negative effects on other sectors, including electronics (-7.1%), motor vehicles (-6.2%), prepared food (-2.7%) and others.

The textile and apparel sector has been growing since the early 2000s, with increasing exports, mainly to the United States and South Africa. Significant growth was registered since 2016 (exports to the EU have been limited, but also higher since 2016 than before). The sector has become the biggest private sector employer, providing 45,000-50,000 jobs,[92] 80% of which are occupied by women (Marie-Nelly, Baskaran, 2021, ITC Trade Map; Morris et al., 2021). However, it has been hit hard by the COVID-19 pandemic and needs to modernise and integrate more processes into its value chain to offer a full product at a competitive price (currently, raw materials are imported) (Velaphe, no date; US ITA, 2021). Therefore, the EPA contributed to the textile sector's employment growth (as estimated by the CGE model), whereas the EPA's calculated negative effects on the apparel sector in actual fact meant slower growth of the sector rather than absolute job losses.

Regarding the estimated effects for the leather, motor vehicles and transport equipment sectors, these require further investigation. Lesotho has been part of a regional value chain in the automotive sector, exporting to South Africa textile and leather covers for vehicle seats and electrical switching equipment. The literature suggests that a part of the car seat production has moved from South Africa and Lesotho to Europe to be closer to the main assembly plants (OECD, 2022; Global Africa Network, 2022). If so, this might have had an impact on output and employment; however, it would not be linked to the EPA but rather to other factors such as lead times and transport costs.

Mozambique

The economic model estimates a limited employment creation, thanks to the EPA, in sectors including coal (0.9% for unskilled workers and 0.6% for skilled ones), gas (0.7% for both worker groups), beverages and tobacco (0.5%), and leather (0.6%). It also finds a positive effect on the vegetables, fruit and nuts sector (0.2%), which is important in view of Mozambique's efforts to diversify exports and develop e.g. cashew exports (interviews with Ministry of Industry and Trade and Ministry of Agriculture and Rural Development). Cashew exports to the EU have been increasing (although still being relatively limited) and may become important from job creation and poverty reduction point of view. Around 1.3 million families cultivate cashew nuts, generating income additional to subsistence farming. Further 150,000 persons are engaged in processing and marketing cashew nuts, with a potential for 30,000 more jobs (Costa, 2019). However, further development of the sector would require overcoming current constraints in access to seeds, fertilisers and finance; the EPA's preferential market access alone is not sufficient.

A study by Egger et al. (2021) analysing the socioeconomic impacts resulting from opening four coal mines in Mozambique found that persons (both men and women) who had moved from subsistence agriculture (as self-employed persons or non-paid family members) to pick up jobs as wage workers in mines and associated services increased their income and consumption. Therefore, the increase in employment in the coal sector caused by the EPA is likely to have contributed to poverty reduction among workers in mining and services.[93]

---

[91] Note that Lesotho is part of the automotive value chain through textile and leather covers for vehicle seats; but these would rather be classified as textile and leather industry, not motor vehicles. Therefore, effects estimated by the model for employment in motor vehicles and transport equipment sectors seem to be rather theoretical.

[92] Figures vary depending on the source, given a temporary loss of jobs during the COVID-19 pandemic.

[93] The study also acknowledges that the phase of preparation for investment was related to displacement of 2,528 families whose living conditions usually worsened as a result (Egger et al., 2021).

The same study also found that thanks to the increased welfare in families where adults had moved from subsistence agriculture to jobs in mining and related services, children withdrew from economic activity to continue education. It is also likely that mining firms were obliged to submit part of their revenues to the local communities enabling a better delivery of education services. This was followed by an increase of primary school completion rate. Therefore, coal exports to the EU, by supporting existing and new jobs in mining and services sectors may have contributed to child labour reduction in agriculture.

While there are no precise data regarding the nature of acquired jobs (formal or informal), those in large companies would normally be formal. Overall, in the past decade, the number of formal jobs in the mining sector was estimated at 33,000, while a further 150,000 people worked in informal artisanal mining (Yager, 2021).

The tobacco sector provides employment for 130,000-150,000 farmers.[94] They receive inputs (seeds, fertilisers, etc.) from leading firms, and as the tobacco cultivation and a guarantee of selling the product supports their income, they do not have an incentive to switch to other crops (Global Tobacco Index, 2021).[95] As exports to the EU account for 50%-70% of Mozambiquan tobacco exports (OECD, no date; ITC Trade Map), it is likely that they have contributed to supporting livelihoods of farmers. In this context, it is to note that while young people face high unemployment rates in the country, they are less likely than the other age groups to have benefitted from exports in agricultural products to the EU.[96]

According to the model, the EPA has had a negative effect on employment in some sectors, including wheat (-0.6%), ruminant meat (-1.6%), other meat (-9.0%), dairy products (-1.4%), paper (-1.8%), rubber and plastics (-1.3%), electronics (-4.4%), electrical equipment (-2.9%), machinery (-0.8%), and motor vehicles (-0.5%). However, as Mozambique's production in the last four sectors is marginal, the absolute effect of these job reductions is very limited. On the other hand, imports of machinery and diverse types of equipment from the EU help to increase Mozambican production capacity in different sectors. For example, imports of equipment and packaging in the fisheries sector facilitate the operation of the sector and tuna exports to the EU (interview with Association of Producers and Exporters of Fish Products). As to the estimated negative effects in the agriculture and food-processing sectors, further analysis will be required to determine to what extent imports from the EU can be considered as direct competition pushing local producers out of the market and to what extent they contribute to ensuring food security.

Namibia

The economic model estimates that the EPA led to employment creation in several sectors, including wheat (4.4%), other grains (5.2%), vegetables, fruit and nuts (5.9%), sugar (2.4%), fibre crops (1.6%), other crops (5.3%), cattle (3.2%), other primary products (2.8%), forestry products (2.9%), fishing (5.7%), coal (12.8%), gas (1.0%), ruminant

[94] The analysis of negative impacts related to tobacco consumption is addressed in the evaluation of the EPA's human rights effects.

[95] Given high informality levels in agriculture, it is likely that jobs of the tobacco cultivating farmers are also informal.

[96] Many young people leave rural areas to pick up jobs in fishing and building infrastructure, among others. They are not attracted by jobs in agriculture or processing plants as they do not own the land, do not have skills to work effectively in formal industrial jobs and are discouraged by low entry wage levels they would need to start with while developing their experience on the job and through training. Moreover, the hardship of life in rural areas with no easy access to electricity, drinking water, education or healthcare is not appealing for them (Costa, 2019, British American Tobacco, 2017). Participants at workshops for this study emphasised that the low level of qualifications among people, including youth, is one of the reasons holding Mozambique back in development and economic performance. They also pointed at the lack (or underdevelopment) of processing industry and the related large share of raw materials exported by the country. In their view, industry development, including processing plants, would create more jobs and enable EPA to generate benefits for the population, including in rural areas.

meat (8.7%), dairy products (2.5%), other prepared food (10%), beverages and tobacco (2.1%), textiles (1.3%), leather (3.4%), metal products (3.9%), chemicals (1.0%), construction (1.9%), land transport (1.3%) and water transport (1.0%). According to the model, in some sectors, job creation is likely to be supported by exports to the EU, in other cases, by increasing production for the domestic market. Given the high number of the affected sectors, the further analysis, to be undertaken in the remainder of the evaluation, will be focused on those engaged in exports to the EU, i.e., vegetables, fruit and nuts, fishing, ruminant meat, other prepared food[97], and metal products.

Employment in the fishing sector increased from around 13,000 in 2013 to 16,000-18,105 (depending on the source) in 2021. Jobs on board of fishing vessels represent around 40% of the total, while the remaining 60% are in the processing industry. Workers taking jobs in the sector often migrate from other Namibian provinces and send remittances back home which suggests that employment in the sector contributes to poverty reduction also in other parts of the country (ICSF, 2013; ILO, 2021; ILO, 2022a). Jobs in the marine commercial fishing should already be or should become formal, given that Namibia in 2018 ratified ILO Convention No. 188 (work in fishing) which provides for such a requirement. In 2023, Namibia issued new terms of work in the fishing sector to align its legislation with the Convention (New Era, 2023). Because exports to the EU represent around 55% of the total fisheries exports from Namibia (ITC Trade Map), one can conclude that they are likely to have contributed to job creation in the sector and to poverty reduction.

In the vegetables, fruit and nuts sector, table grapes represent the main product exported to the EU. In 2015, the grape industry employed 5,500 permanent and 6,000 part-time workers (New Era, 2017). More recent estimations speak about 12,000-16,000 workers in total which suggests an increase over the period under review. Some seasonal workers travel for harvest from other Namibian provinces, which means that work in the sector supports people's livelihoods also in other parts of the country. There are diverging reports regarding wages in the sector, with some claiming they are very low (the difference in reporting may be due to different working conditions applying to permanent and seasonal workers). The same reports also speak about harsh living conditions of workers (Jansen, 2020; Smith, no date). This would suggest that exports to the EU, which account for 50%-60% of Namibia's total grape exports (ITC Trade Map) have contributed to job creation in the sector and poverty reduction, although the potential for a positive change may not have been utilised in full if wages offered to workers are indeed very low and if the public authorities and the private sector have failed to ensure decent living conditions for workers on/next to farms, such as access to electricity, safe drinking water and toilets.

The commercial livestock farming sector provided some 25,000-30,000 jobs prior to the start of the EPA application (World Bank, 2012). More recent data are provided for the whole sector, covering commercial and other types of farms, therefore are not directly comparable. Accordingly, in 2018, raising cattle and buffaloes provided jobs for 11,859 persons, and mixed farming, combining crops with livestock, employed 70,747 persons. At the time, also 4,000 freehold commercial farmers were involved in livestock farming (Nangolo, Alweendo, 2020).[98] Based on these, it is not possible to draw conclusions regarding employment trends in the commercial farming, engaged in exports. Also, no data on jobs in the meat processing industry could be found. However, it is likely that exports to the EU accounting for 29% of the Namibian beef exports in 2022 (Food Business Africa, 2023) supported jobs in the livestock and meat processing sectors.

[97] Participants at the workshop indicated they were not aware of any substantial prepared food exports from Namibia to the EU.

[98] Another study conducted in 2019 among traditional farmers in the Omusati region revealed that only 2.4% of traditional livestock farms were owned by people under 40 years of age. While some people from this age group may have worked on farms owned by older family members, this evidence may also suggest the lack of opportunities for young people to be engaged in agricultural activity (CCARDESA, 2019).

Given the composition of Namibia's exports to the EU benefitting from the EPA, participants at the workshop expressed concerns regarding changes in the EU SPS regulations which may make exports of food products more difficult, notably for SMEs. This in turn may have negative effects for their operation and jobs. To mitigate this risk, exporting companies should receive guidance on how to meet the requirements.

The model simulations also find negative employment effects in some sectors, including other meat (-2.5%), vegetable oils (-2.6%), rubber and plastics (-1.0%), computer and electronic equipment (-1.6%), electrical equipment (-3.2%), machinery (-3.2%), motor vehicles (-2.9%), and other transport equipment (-8.5%). Further analysis is to be undertaken. Participants at the workshop indicated they were not aware of any production of other transport equipment in Namibia, in which case, the estimated effects would be only theoretical.

South Africa

The economic modelling results show positive employment effects of the EPA in a range of sectors including wheat (1.9%), other grains (1.0%), vegetables, fruits, and nuts (2.3%), cattle (2.1%), sugar (6.3%), beverages and tobacco (0.5%), motor vehicles (2.5%), and other transport equipment (1.2%). Negative effects are found for textiles (-0.6%), apparel (-2.7%), leather (-1.3%), and rubber and plastics (-0.8%).

The positive effects in the vegetables, fruit and nuts sector are also visible in several subsectors: Employment in the citrus fruit sector increased from 125,000 in 2016 to 140,000 in 2023. The sector offers jobs mostly to unskilled workers, often in poor rural areas where other job opportunities are scarce. According to the South African Citrus Growers' Association, there is potential to generate further 100,000 jobs if the current challenges are addressed (Lucentlands Media, 2023; CGA, 2016). The CGE results are also immediately plausible in view of the observed trends in the sector: Exports to the EU have been growing over time and account for a significant share (30%) in South Africa's total exports of the sector. It is therefore safe to conclude that the EPA indeed has contributed to job creation in the sector and poverty reduction.

Employment has also increased in the grape sector, from 51,593 (8,339 permanent jobs and 43,254 seasonal ones) in the 2016-2017 season to 101,713 in the 2022-2023 season (14,843 permanent jobs and 86,870 seasonal ones) (SATI, 2017; 2023). Exports to the EU account for around 55% of total exports, and thus one can conclude that the EPA has contributed to job creation in the sector in both job categories. And although exports to the EU in other fruits and nuts subsectors are more limited, they are also likely to play a role in maintaining existing and creating new jobs.

Developments in the sugar sector are also in line with the CGE model simulation results. In 2013, the sugar sector provided 79,000 direct and 350,000 indirect jobs (SASA, 2013). Since then, the number of direct jobs increased to 85,000. Moreover, in 2019-2020, there were 21,711 registered small-scale sugar cane growers, 1,126 large scale growers and 14 mills (SASA, no date). The EPA's strong employment effects in the sector are thus corroborated by the observed job creation in the sector.

In the automotive sector, employment in the seven assembly plants fell from 38,600 in 1995 to 29,926 in 2020 due to the application of modernised technologies, including automation and robots. However, as workers became more productive and the annual production went up from 388,442 vehicles in 1995 to 631,983 in 2019, demand for car components grew and this contributed to employment growth in the component manufacturing sector, from 60,000 in 1995 to 80,000 jobs in 2019 (Mashilo, 2022). The CGE model does not distinguish between these sub-sectors, but the relatively strong overall employment increase found to have been caused by the EPA aligns with the overall

job growth in the sector in South Africa in the context of productivity-increasing technological change.

The textile and apparel industry lost 121,474 jobs in 2005-2021, with employment in the sector decreasing from 195,709 to 74,235 (Statistics South Africa, 2023). Most of that loss occurred between the early 2000s and 2013 (i.e., before the EPA), although the COVID-19 pandemic as well as the EPA, according to the CGE model simulation results, have also contributed to the trend. The Government has provided support to the sector through skills and technology development (CCTC, no date).

6.2 Effects for Women

In this section, we analyse the EPA effects for women as workers and (to the extent data are available) also as entrepreneurs, farmers, and traders, in SADC EPA States, in the main sectors identified in section 6.1 as affected by the Agreement.

Botswana

In the livestock sector, for which the economic model estimates a job creation thanks to the EPA (cattle 0.8%, ruminant meat 1.9%, other meat 0.5%), the share of female farmers managing traditional holdings has decreased compared to men over the period under review. In 2014, women accounted for 47.7% of farmers (57,364 out of 120,317), while in 2019, their share had gone down to 36.8% (20,234 out of 54,907). Women also represented a small minority among workers hired at farms: 4.3% in 2014 (955 out of 22,243) and 5.0% in 2019, while their absolute number decreased to 750 out of 14,898 (Botswana Statistics, 2020; 2016). Men dominate cattle and large-scale farming (100-500 cattle at a farm), while women are more often in charge of small farms (5-100 cattle) and small livestock (goats, sheep, and chicken). Moreover, while the domestic legislation has been amended to remove gender-based discrimination, women more often than men face challenges in land and livestock ownership and access to funds. This means that female farmers are more exposed to risks related to domestic factors (also those mentioned in section 6.1, like droughts) and less likely than men to be able to benefit from the EPA, including exports to the EU. Likewise, female farm workers, due to a small number, are less likely to benefit than men from jobs created in the sector. The only exception may be white women who own commercial farms in the Western Region (Ghanzi province) and who may be engaged in exporting activity (Okechukwu Uchendu et al., 2021).

In the textile and apparel sectors, for which the economic model estimates negative employment effects of the EPA (textiles -1.8%, apparel -2.3%), women represent 80%-90% of workers (Motswapong, Grynberg, no date), notably in low-skilled jobs, while men occupy most managerial positions related to production (Ranthokwane, 2015). As discussed in section 6.1, the textile and apparel sectors have been facing challenges and suffered from job losses over the last decade, due to decreasing exports to the US and relocation of exporting firms to Lesotho. Given the large share of women among the workforce, they have been more likely than men to feel the negative consequences of the decline. However, as explained, the reasons for this have largely related been to factors other than the EPA.

Eswatini

Men dominate in the coal mining sector, for which the economic model estimates job creation (1.1% for unskilled workers and 1.2% for skilled ones). While one company extracting anthracite started employing more women, including in managerial roles and in underground jobs (Times of Eswatini, 2022), it is clear that in this sector men are more likely than women to benefit from jobs that may have been created thanks to the EPA.

In the sugar sector, for which the economic model (in scenario B) estimates an employment increase of 0.5%, women play an important role. In a study conducted prior to the start of the EPA application, they represented 57.1% of the surveyed smallholder farmers growing sugar cane (Kibirige, Singh, no date). While exports to the EU declined over the last few years, influenced at least partly by changes in the EU sugar market policy and the abolition of preferential prices, the EU has provided assistance to smallholder farmers to compensate those losses and support their livelihoods. The final evaluation of that assistance found that the EU intervention had helped to increase the area of sugar cane growing by smallholder farmers, boost yields, install irrigation systems, improve road quality, lower the cost of bank loans and, through provision of training, also improve field management. As a result, improved yields from larger areas have brought about higher income, while better road quality and more convenient terms of loans meant lower operational costs for smallholder farmers. The beneficiaries became competitive and less dependent on the EU market, exporting instead to the SADC region and other African countries (EU Delegation to the Kingdom of Eswatini, 2022; Landell Mills International, 2021). Therefore, women smallholder farmers growing sugar cane may have benefitted from opportunities offered by the EPA or from the assistance provided by the EU.

Women account for 95% of workers in the textile and apparel sector (IFC, 2022) for which the economic model estimates employment reduction by -1.7% and -6.1%. As discussed in section 6.1, exports from the sector have been growing, however, it has also faced setbacks, such as the suspension of preferential access to the US market (which resulted in job losses) and side effects of South Africa's 2021 regulations on a rebate favouring local sourcing at the expense of textile imports (University of Manchester, 2022). No evidence could be identified that would confirm the direct effects of the EPA, while these or indirect effects cannot be excluded. Given that women represent almost the entire workforce in the sector, they benefit from sector's growth and job creation through production for exports, and – on the other hand – they are exposed to negative impacts if access to international markets becomes more restricted or competition increases.

Lesotho

Women account for 80% of the 45,000-50,000 workforce in the textile and apparel sector (Marie-Nelly, Baskaran, 2021, Latela, Brown, 2022; Morris et al., 2021), for which the economic model estimates mixed outcomes (employment growth in the textiles by 1.7% and a reduction in the apparel sector by -1.3%). As discussed in section 6.1, the sector has been growing since the early 2000s, with increasing exports, mainly to the United States and South Africa and more limited to the EU, and all of them increasing since 2016 (ITC Trade Map). However, it has been hit hard by the COVID-19 pandemic and some jobs have been lost either temporarily or permanently. Moreover, there have been cases of sexual harassment and gender-based violence in garment factories, with female workers being abused by managers and other male staff (Worker Rights Consortium, 2019). In response to these reports, Lesotho trade unions and women's organisations, supported by US partners, negotiated with the employer and three sourcing brands an agreement to set up a complaint mechanism, while the employer should refrain from any retaliation towards workers who would use it (Connell, 2019). Given their share among textile and garment workers, women are, therefore, likely to benefit from exports, including to the EU, as they support employment in the sector. However, they are also exposed to external shocks affecting the sector (like the pandemic) and resulting in job losses. The overall effects for women are likely to be mixed, given the abusive working environment in at least some production facilities. Moreover, as there are no monitoring discussions under the EPA TSD chapter, nor dialogue with civil society, there are no easily accessible channels where concerns related to workers' rights or working conditions in the exporting sectors could be raised with the EU side and/or SADC EPA States in the context of the EPA implementation.

Mozambique

Regarding sectors benefitting from the EPA in exports to the EU, to-date, we have not managed to identify comprehensive employment data in the mining sector (notably coal and gas) in a break-down by gender. Partial data based on returns from companies reporting to the EITI suggest that in 2020 women accounted for 12.6% of their 10,852 workers (EITI, 2022). Given the nature of the sector, women tend to take administrative roles or jobs in related services (Egger et al., 2021). They sometimes face harassment, HIV, and gender-based violence in the sector's masculine environment and bear higher costs of community displacements for investment projects (Blessing, 2017; Ikweli, 2021). Therefore, impacts related to exports to the EU for women may be mixed: positive linked to jobs that generate higher income than subsistence agriculture (while men have benefitted from more jobs) and negative regarding working environment and consequences for the community life.

The analysis of the tobacco concession system over the last two decades suggests that female-headed farms have been less likely (than those headed by men) to enter contracts with leading companies, and if they do so, they tend to earn less. This may be explained, at least partly, by a smaller size of plots owned by women and by a more restricted access to labour force and funding to start growing cash crops (Navarra, 2019). This would mean that women as farm owners may have benefitted less frequently than men from growing tobacco and selling it, including for exports to the EU. At the same time, on family farms owned by men, women also work (as unpaid family members) supporting crop cultivation. Therefore, they also benefit from increased household's income, although revenues are usually managed by men.

In the cashew nuts sector, which still plays a minor role in exports to the EU, women represent 57% out of 17,000 workers in 15 processing factories, and one third of heads of 1.3 million households cultivating cashew nuts. Incomes from cashew nuts support the households' budget and contribute to poverty reduction. With an increasing emphasis on processing nuts in Mozambique (as opposed to exporting raw nuts), there is a potential for 30,000 additional formal, wage jobs in processing plants, 60% of which could be taken by women. However, working conditions in processing plants are considered as challenging, with payments at piece-rate (usually below the national minimum wage), exposure to harmful substances and the lack of childcare facilities. There are no women in leadership roles in processing plants. We have not found any information about a potential influence of exports to the EU on working conditions in processing plants. However, as exports to the EU include primarily partially processed and processed nuts, increasing exports may potentially play such a role in the future. Moreover, the EU has provided support to cashew nut growing (old tree replacement) (Costa, 2019). Based on the above, one can conclude that exports to the EU (still small but increasing) are likely to have benefitted women and contributed to poverty reduction, while working conditions in processing plants require improvement.

Namibia

The economic model estimates an employment increase in the fishing industry by 5.7% thanks to the EPA. While men dominate in jobs onboard fishing vessels, women account for 64% of workers in land-based processing factories (in the scale of the whole sector, jobs onboard fishing vessels represent around 40% of the total, while the remaining 60% are in the processing industry). Given that the overall employment in the sector increased from around 13,000 in 2013 to 16,000-18,105 (depending on the source) in 2021 (ICSF, 2013; ILO, 2021; ILO, 2022a; Business Express, no date) and given that exports to the EU represent around 55% of the total fisheries exports from Namibia (ITC Trade Map), one can conclude that women may have benefitted from the sector's growth thanks to the EPA and exports to the EU, notably if some of the exported products have been processed in land-based facilities, thus maintaining or increasing demand for jobs there.

In the livestock sector, for which the economic model estimates employment increase thanks to the EPA (cattle 3.2% and ruminant meat 8.7%), female farmers represent a minority, in particular in the commercial and cattle part of the sector, as traditionally, this has been considered men's activity (Uvanga et al., 2006; Lukas, 2022). Women feature more often in the subsistence livestock farming and in rearing smaller animals. A study conducted in 2019 in the Omusati region revealed that women represented 40% of the subsistence livestock farmers where goats were the most often reared animals (42.8%), followed by chicken (25.2%) and cattle (22.3%) (CCARDESA, 2019; 2019a). Therefore, female farmers are less likely than men to benefit directly from opportunities offered by the EPA, including from beef exports to the EU.

South Africa

The economic model estimates employment increase in the vegetables, fruit, and nuts sector (2.3%). As discussed in section 6.1, this includes sub-sectors such as citrus fruits, table and wine grapes, and other fruits. Regarding table and wine grapes, available data suggest that women work in the sector mainly as seasonal workers (compared to male permanent workers). This in turn means precarious working conditions: no guarantee of the statutory minimum wage (their wages depend on meeting daily targets), no paid leave and other social benefits, and often no written contract. Moreover, they work long hours, often without access to basic facilities, like toilets, and are exposed to pesticides. Some of them are migrant workers from other countries of the region and are afraid of defending their rights out of fear of losing the job and being deported to the home country (Oxfam, 2017; 2022a; Naser, Solomon, Louw, 2021). Therefore, while employment in the sector has increased in the period under review and the number of seasonal jobs doubled from 43,254 in 2016-2017 to 86,870 in 2022-2023 (SATI, 2017; 2023), which means that many women may have found jobs, the potential for a positive change has not been fully utilised given low wages and precarious working conditions.

In the citrus fruit sector, already prior to the EPA application women represented the majority of workers in the packing and sorting jobs, while they also started taking managerial positions and other jobs at farms, in the production, logistics, marketing, trade, research and inspections (CGA, no date). Statistics regarding the number of women currently employed in the sector could not be found so far. However, given that employment in the citrus fruit sector increased from 125,000 in 2016 to 140,000 in 2023 (Lucentlands Media, 2023; CGA, 2016) and given also that exports to the EU have been growing over time and account for a significant share (30%) in South Africa's total exports of the sector, one can conclude that women are likely to have benefited from the growth and that the EPA has contributed to job creation in the sector also for women.

6.3 Effects for Consumers

According to the literature (e.g., Cernat et al., 2018), consumers usually benefit from global trade and preferential trade agreements due to lower prices of purchased goods and services (resulting from reduction of tariff and non-tariff barriers), a wider variety of traded goods and services, the related satisfaction of diversified needs and preferences, and a higher quality of available goods and services. Given that the EU-SADC EPA covers only trade in goods, the benefits enjoyed by consumers are likely to be concentrated in this area and therefore be more limited in scope than in the case of other recent EU trade agreements. Nevertheless, thanks to the Agreement and the related changes in trade flows, EU-based consumers may benefit from an improved availability and accessibility of certain products (e.g., citrus fruits or grapes sold at convenient prices outside the European season) and a wider variety of goods (e.g., South African wines extending the range of wine types available to EU consumers). In the SADC EPA States, consumer needs may be better addressed by imported EU medicines, vaccines, or motor vehicles, while other gains may come indirectly. For example, imports of machinery, equipment, and components

from the EU to the SADC EPA States may enable manufacturing of better-quality products for the domestic market and exports.

Moreover, as outlined in section 6.1, job creation in several sectors in the SADC EPA States supported by exports to the EU and a limited increase in real wages are likely to have contributed to poverty reduction and increased purchasing power of workers who are also consumers. However, as also indicated in the same section, in some sectors (grape sector in Namibia and South Africa being one of them) the potential for positive change and gains for workers-consumers has not materialised in full given low wages and other precarious working conditions, offered in particular to seasonal workers who receive wages falling below the statutory minimum wage or whose wages depend on meeting high daily targets, even on farms with certifications (Oxfam, 2017; 2022a; Naser, Solomon, Louw, 2021). The available evidence also suggests that EU-based institutional buyers (retail chains, supermarkets) exercise pressure on suppliers to purchase their products at conveniently low prices. This further reduces the margin that wages of farmworkers may have in the final price. This calls for EU buyers to assume responsibility for paying prices that allow for decent wages, and some may be obliged to do so and to exercise due diligence in their supply chain (e.g. as required by the German Supply Chain Due Diligence Act) (Oxfam, 2022a).

Regarding the safety of consumer products imported by the EU from SADC EPA States, the EU Safety Gate system[99] reports unsafe non-food products imported to the EU from third countries, while the EU RASFF system[100] reports unsafe food products. Overall, given a low number of reported unsafe products (see details below), one can conclude that the risk is relatively low.

Over the period 2011 to October 2023, the Safety Gate system reports 39 unsafe products from South Africa (mostly related to automotive sector, hair colouring products and other cosmetics, 11 from 2016 to 2016, and 27 from 2017 to 2023, primarily the result of spikes in notifications in 2017 (8) and 2022 (9)), two from Eswatini (a night lamp with an alarm clock and a racket – sport equipment, both in 2022), one from Mozambique (a laser pointer, in 2012), and none from the other SADC EPA States; all but one of the 42 notifications were marked as serious risks.

Given the low number of notifications, and the fact that notifications regarding South African products since 2017 were concentrated in two years only, no meaningful trend analysis can be undertaken. But considering that some of the products, such as hair colouring products and a night lamp, are marked as sold online, the Parties may consider in the future whether the Agreement provides sufficient protection in online purchases, including customer safety, protection of consumer rights as well as protection of personal and financial data.

In the RASFF system, over the period 2020 to October 2023,[101] 37 notifications related to unsafe products from South Africa, out of which 16 were marked as a serious risk. There were also four notifications for products from Namibia (one of them marked as a serious risk and one potentially serious), 14 products from Mozambique (eight marked as a serious risk), and no notifications for Lesotho, Eswatini and Botswana. Serious risk cases included mostly aflatoxin in diverse types of nuts, pesticides in fruits, as well as salmonella, mercury and other prohibited substances in different products, including fish, beef, citrus fruits and raisins (also see section 4.7 above).

Information about unsafe EU exports to the SADC EPA States is not available, but stakeholders consulted by the evaluation team indicated that this posed no issue. In this

[99] https://ec.europa.eu/safety-gate/ (the former Rapid alert system for dangerous non-food products, RAPEX)
[100] https://ec.europa.eu/food/safety/rasff-food-and-feed-safety-alerts_en
[101] Data for earlier years are no longer available in the RASFF database.

context, the analysis provided in sections 4.6 and 4.7 (TBT and SPS) suggests *inter alia* that technical and financial assistance provided by the EU to the SADC EPA States in developing their administrative capacity may be beneficial to local consumers. In several countries, including Botswana and Mozambique, this allowed to test and reject non-complying products imported from third countries, thus increasing protection for local consumers.

6.4 Effects on the Application of CSR/RBC Practices

The available evidence suggests that the EPA, through supporting the SADC EPA States' exports to the EU, has contributed to the increased participation of exporting farms in sustainability certification schemes. Reportedly, EU-based institutional buyers of consumer products (retail chains) require that their suppliers of agricultural and food products are certified in accordance with the exported product (e.g., Global GAP for grapes and other fruit) or their country of origin (e.g., Wine and Agricultural Ethical Trade Association of Fairtrade in South Africa) (Oxfam, 2022a). Indeed, the Global GAP database confirms (as of December 2023) high numbers of certifications notably in South Africa (325 table grapes producers, 372 apple producers, 589 orange producers, 628 lemon producers and 24 strawberry producers). As the database does not display the start date of the certification (only the last assessment), it is not possible to evaluate changes in numbers over time and their possible relation with the EPA and exports to the EU. South Africa also accounts for around two thirds of global sales of fairtrade wine. The number of Global GAP certified farms in other SADC EPA States is lower, e.g., there are 13 grape producers in Namibia, and two orange producers, one lemon producer and one sugar cane producer in Eswatini.

While the adherence to certification schemes is encouraging, there are also negative aspects that need to be addressed. For example, the available evidence suggests that even at certified farms there are cases of workers' rights violations and precarious working conditions applied in particular to seasonal workers, mostly women, from South Africa and other countries of the region (wages below the statutory minimum, no social benefits, and no paid leave, or written contract). In at least some of such cases, the lines of responsibility for compliance are blurred by the use of intermediaries and sub-contracting seasonal workers, and this ambiguity can be exploited by farm owners and intermediaries alike, both blaming the other party for any identified shortcomings. Moreover, EU-based retail chains exercise pressure on suppliers to sell their products at low prices and to pay fees for getting onto supplier lists, a better place on the shelf or advertisements. This has contributed to decreasing margins over the last two decades (e.g., for wine), which in turn has a negative impact on wages of farm workers and other elements of working conditions. Additionally, the lack of transparency in supply chains makes it more difficult to link farms in SADC EPA States with an EU-based retail chain to demand from the latter to take its part of the responsibility for workers' welfare and observance of other standards (Oxfam, 2022a). That said, partly in response to recent and upcoming legislative developments across the EU on enhancing supply chain transparency and due diligence, some EU-based retail chains (supermarkets) have started displaying on their websites the first-tier suppliers and at least one has also provided information (for selected products: tea, bananas, strawberries, and seafood) on original suppliers (farms). In that case, one producer from Mozambique features on the list for tea and two companies from South Africa are listed for seafood.

There are also other examples of adherence to sustainability or ethical schemes. However, as some pre-date the start of the EPA application, they should be considered as not related directly to the Agreement, but rather to the policy in the sector or individual companies, or exports (including to the EU) but not necessarily under the EPA. For example, coal, metal mining, oil, and gas companies operating in Mozambique report annually under the

Extractive Industries Transparency Initiative (EITI) (since joining it in 2009)[102] and this information includes *inter alia* data related to the number of generated jobs and related types of contracts, as well as environmental impact of extractive activities.

There are also several examples of CSR/RBC activities undertaken by individual companies or business associations in the SADC EPA States which can be explained by the requirements of the domestic legislation or a custom of contributing to the welfare of the local community (see more detail in the social baselines, **Appendix C1**). For example, in the sugar sector in Eswatini, one of the companies claims to allocate 5% of its annual budget to projects related to Corporate Social Investment in communities where it operates, including in socio-economic development, education, health and environment, as well as in reducing its impacts on environment (e.g., solar plant project to reduce carbon emissions). While these activities are not related directly to the EPA and its provisions, one can assume that in sectors engaged in exports to the EU the exposure and gains from trade facilitate such activities.

Finally, regarding adherence to international CSR/RBC instruments, several companies from the SADC EPA States have signed up to the UN Global Compact, including 102 companies and NGOs from South Africa. They represent a large range of sectors, including financial services, renewable energy, extractive industries, real estate, construction, IT, utilities, retail trade, tourism, telecommunication, media, medical devices and health care, food production, aerospace, electrical and electronic equipment, beverages, and chemicals. There is also one company (providing accounting services) and one business association from Lesotho, one SME from Botswana (renewable energy sector) and 14 companies and NGOs from Mozambique representing sectors including security services, construction, banking, retail trade, and the automotive industry. As of 10 December 2023, there are no signatories from Eswatini and Namibia (UN Global Compact, no date). Given the number and variety of participants and represented sectors, it is difficult to conclude if trade with the EU and the EPA played any role in them signing up to the Global Compact.

[102] See https://eiti.org/countries/mozambique

7 ENVIRONMENTAL EFFECTS OF THE EPA

This chapter presents the preliminary findings regarding the environmental effects of the EPA across the six main impact areas as identified in the inception report, i.e. effects on climate change (section 7.1), air quality (section 7.2), natural resources (section 7.3), biodiversity and wildlife (section 7.4), water availability and quality (section 7.5), and waste and chemicals (section 7.6). In examining the environmental effects, the analysis includes the compliance of the SADC EPA States against key MEAs (Table 20).

Table 20: Overview of Multilateral Environmental Conventions included in the analysis

Climate Change
• United Nations Framework Convention on Climate Change (UNFCCC) • Paris Agreement
Biodiversity and Wildlife
• UN Convention to Combat Desertification (UNCCD) • Convention on Biological Diversity (CBD) • Cartagena Protocol on Biosafety to the Convention on Biological Diversity • Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES)
Air pollution
• Montreal Protocol on Substances that Deplete the Ozone Layer • Kigali Amendment to the Montreal Protocol on Substances that Deplete the Ozone Layer
Water
• Ramsar Convention on Wetlands of International Importance Especially as Waterfowl Habitat (RAMSAR)
Waste and Chemicals*
• Basel Convention on the Control of Transboundary Movements of Hazardous Wastes and their Disposal • Stockholm Convention on Persistent Organic Pollutants • Rotterdam Convention on the Prior Informed Consent Procedure for Certain Hazardous Chemicals and Pesticides in International Trade

* SADC Parties have also agreed to adopt the 1994 Bamako Convention on movement of hazardous wastes within Africa, which came into force in 1998. Although this is a multilateral environmental agreement, we have not analysed this as it has no direct relation to the EU.

7.1 Climate Change

The SADC EPA States all have shared characteristics with respect to climate change, such as high vulnerability and extreme weather events impacting main economic activities such as agriculture. Mozambique, in particular, is highly vulnerable to climate change and is affected, on average, by a tropical cyclone or a flood event every two years and a drought event every three years.

All partner countries have low emissions per capita, with South Africa being the major exception to this rule, with greenhouse gas (GHG) emissions per capita that were 32% above the global average in 2022. The main cause for this is South Africa's high use of coal-fired electricity production. Coal-fired electricity production is also responsible for rising emissions in Botswana, which went from being a net sink of GHG emissions in 2000 to a net emitter in 2015. In Namibia and Mozambique, emissions from land use, land-use change, and forestry (LULUCF) are key contributors to rising emissions, although emissions remain low in absolute terms. Main drivers to the high level of climate change impact in most of the SADC EPA States are their relatively poor economies and the combination of the high dependency on agriculture for own food production and the small-scale basis of farming.

Table 21 summarises the main developments in GHG/CO_2 emissions, main issues and achievements in addressing climate change since the implementation of the EPA. Further details on the result of the assessment are included below.

Table 21: Overview of main developments in climate change

Country	CO_2/capita 2016*	CO_2/capita 2022 *	Main developments in implementation of MEAs and main policy changes since start of EPA
Botswana	5.30	5.05	Formulation of Climate Change Policy in 2018 which was adopted by the Parliament in 2021; formulation of a national climate change action plan and strategy; third National Communication (NC3) and first Biennial Update Report (BUR1) published in 2019
Eswatini	2.33	2.28	Updated Nationally Determined Contribution (NDC) and initial adaptation Communication published in 2021; implementation plan for the adaptation and mitigation strategies published in May 2023. No BUR published and latest NC is from 2016. No climate change law adopted.
Lesotho	1.30	1.27	NC3, BUR1 and First National Adaptation Plan published in 2021. The NDC dates from 2018; governing framework and main policy documents all from 2017.
Mozambique	1.14*	1.17	NC2, BUR1 published since 2018
Namibia	5.22	4.67	NC4, BUR2, BUR3, BUR4 published since 2016
South Africa	10.54	8.91	Formulation of the Climate Change Bill (since 2018, not yet adopted), submission of first National Adaptation Plan (2021) and significant strengthening of targets in the updated NDC (2021). Target defined for achieving net zero emissions by 2050.

* As reference CO_2/capita is provided in the year 2016, the year in which most of the SADC countries joined the EPA. Mozambique joined in 2018 in which year the CO_2 emissions per capita were 1.27.
Sources: CO2/capita – Edgar database; summary of main developments – UNFCCC reporting and reports by national ministries.

Changes in indicators since applying the EPA are relatively limited. All countries have laid down ambitions to reduce GHG emissions compared to their business-as-usual developments in their (updated) NDCs but as stated in these documents achieving these reductions in all countries is conditional on international support. All countries see a high need for reducing emissions in the energy sector, with growth in energy from renewable sources as a main part of their planned policies. South Africa and Lesotho also have a high need to increase their energy efficiency.

The EU and other donors are providing financial support to decarbonisation of economies in the SADC region. The signature of the first ever Just Energy Transition Partnership with South Africa was a flagship outcome of COP26 whereby the EU, France, Germany, the UK and the US mobilised USD 8.5 billion in loans, guarantees and grants (over 3 to 5 years) in support of accelerating the decarbonisation of the South African economy and to invest in renewable energy sources, while placing a central emphasis on a just transition for all. Two years into the Partnership progress has been made to commit funding and increase support for it as well as in pursuing reforms that are needed to support its objectives.

A seemingly contrasting development is that in 2022 EU coal imports from South Africa, Mozambique and Botswana have steeply increased (Reuters, 2022 and IEA, 2022; also see the descriptive trade analysis in **Appendix B1**). This increased purchase of coal on international markets by EU countries during the winter 2022-23 was indicated to be a last resort, short-term measure due to Russia's war of aggression against Ukraine. Eurostat import statistics indeed show a decline of EU coal imports from the SADC EPA States from the peak of 2.8 million tonnes in October 2022 to 491 thousand tonnes in October 2023. Consequently it is concluded that the 2022 increase in EU coal imports had no relation to the EPA; it is also noted that coal imports into the EU are MFN duty-free, and accordingly the EPA provides no preferential market access.

Increased trade could directly result in an increase in GHG emissions, among others from enhanced land conversion in response to increased agricultural production, from increased fertiliser use in agriculture and from increased traffic. The results of the CGE modelling undertaken by DG Trade suggest that changes in trade due to the EPA have had a negligible impact on the total CO_2 emissions of the SADC EPA States as well as of the EU, and globally. Under Scenario A the CO_2 emissions are 0.000012% higher for the EU and 0.00006% higher for the SADC EPA States. Under scenario B the CO_2 emissions are 0.00002% higher

for both the EU and the SADC EPA States. So in all cases the scale effects are very low. Yet it is observed that effects in CO_2 emissions differ from effects in GDP, so there seem to be some structural effects. Zooming into the sectoral CO_2 emissions it is observed that for the EU the EPA has resulted in significant CO_2 emission reductions mainly in sugar (-1.1% in scenario A, -0.98% in scenario B) and vegetables, fruit and nuts (-0.09% and -0.24% respectively). The EU saw sectoral CO_2 emissions under scenario A increase in especially wearing (0.2%) and motor vehicles and parts (0.12%). In scenario B this increase is especially visible in wheat (0.64%), wearing (0.14%), other meat (0.12%), vegetable oils (0.11%), leather (0.11%), rubber and plastics products (0.11%) and textiles (0.10%). For the SADC EPA States the relative changes in CO_2 emissions are more significant as well as more diverse among sectors and States. The largest results are for Namibia, which shows significant CO_2 emission reductions in paper and paper products (-25.6% in scenario A and -22.6% in scenario B), other meat (-14.3% and -17.0%), coal (-12.8% and -11.5%) and in other transport equipment (-12.0% and -10.2%). Mozambique shows significant CO_2 emission reductions in other meat (-9.2% and -8.7%). South Africa shows significant increase in CO_2 emissions as a result of changes in trade due to the EPA, especially in sugar (+6.2% in scenario A, +6.1% in scenario B), motor vehicles and parts (+2.4% and +14.0%) and vegetables, fruit, nuts (+2.2% and +5.9%). There is no evidence that technology effects or product effects have occurred.

Since the start of the EPA there have generally been clear improvements in governance and implementation of climate policies. Most SADC EPA States have issued new reports to the UNFCCC, and some (South Africa, Eswatini, Mozambique and Namibia) updated their NDC in recent years. Lesotho issued most of its climate regulations and policies in the years 2017/18 and submitted several reports to UNFCCC in 2021. In Mozambique and Namibia however, national climate policies predate the EPA. Botswana developed a Climate Change Policy in 2018, which was adopted by the Parliament in 2021. A serious matter is the lack of climate laws in the SADC EPA States. South Africa has been working on the formulation of a climate bill since 2018. The Bill was recently adopted by Parliament and sent to the National Council of Provinces for concurrence. Besides introducing a series of specific measures for both climate change mitigation and adaptation, the Bill requires the minister responsible for the environment to assign carbon budgets to companies to limit their carbon emissions.

South Africa has also introduced a carbon price through the Carbon Tax Act of 2019 that came into effect on 1 June 2019. A phased approach of the carbon tax regime has been adopted to ease the transition. The effective carbon tax rate however remains low in comparison with global averages due to the generous tax-free thresholds and allowances. South African tax rates have increased from an initial ZAR120/tCO2e to ZARR159/tCO2e for the 2023 calendar year (approx. 8-9 EUR/tCO2e). In 2022, the South African Government extended the first phase of its Carbon Tax programme by three years to 31 December 2025, which means that the transitional support measures such as the tax-free allowances and revenue-recycling measures will continue for a few more years. For the period thereafter, the Government announced plans for a steady increase of the tax rate to reach USD 20/tCO2e by 2026, USD 30/tCO2e by 2030 and USD 120/tCO2e by 2050.

None of the other countries have a climate law. In any case, a clear causal link between the EPA and the formulation of climate laws and policies cannot be determined.

7.2 Air Quality

As in all African countries, air pollution is a challenge in the SADC EPA States. Nevertheless, all countries show a significant decrease in PM2.5 emissions since 2016, and their current average annual concentration of PM2.5 emission levels is in line with the least stringent interim target of 35 $\mu g/m^3$ of the World Health Organization (WHO) Air Quality Guideline, However, the levels are 4 to 5 times the regular targeted PM2.5 level of 5 $\mu g/m^3$ (OECD data, 2023), and air pollution is a main cause of death, especially under young children.

In South Africa the main source of PM emissions is fossil fuel use. In the other countries it is a mixed set of activities including waste burning, coal mining, food processing, and various manufacturing industries. Except for South Africa, household burning of wood and biomass for cooking and heating are also main contributors to ambient air pollution.

All SADC EPA States have ratified the Vienna Convention and the Montreal Protocol on the reduction and consumption of ozone-depleting substances (ODS) and the Kigali Amendment to the Montreal Protocol on the reduction of the consumption and production of hydrofluorocarbons (HFCs). The countries are compliant with the reporting requirements from the Montreal Protocol. Data reported to the UNEP Ozone Center show decreasing trends in net total ODS consumption, but all Partner countries, except for South Africa, will need to step up reduction efforts to meet the formal deadline to phase out consumption by 2030. All SADC EPA States have established a licensing system for ODS and in recent years most countries have also implemented a licensing system for HFC.

Table 22 summarises the main development in PM2.5 emissions and main issues and achievements in addressing air pollution since the start of implementation of the EPA. Further details on the result of the assessment are included below.

Table 22: Overview of main developments in air quality

Country	PM2.5 emissions 2016*	PM2.5 emissions 2019	Main developments in implementation of MEAs and main policy changes since start of EPA
Botswana	25.7	25.3	Acceptance of the Kigali Amendment to Montreal protocol in 2020; HFC licensing system in place since February 2023.
Eswatini	22.11	23.4	Ratification of the Kigali Amendment to the Montreal Protocol in November 2020; HFC licensing system in place since April 2022.
Lesotho	31.6	27.8	Ratification of the Kigali Amendment to the Montreal Protocol in 2019. Gradual decrease in net ODS consumption.
Mozambique	23.1	20.7	Ratification of the Kigali Amendment to Montreal protocol in 2020; progress in the phase-out of HCFCs but HFC consumption increased sharply between 2020 and 2022
Namibia	25.7	24.2	Accepted the Kigali Amendment to Montreal protocol in 2020; HFC licensing system has been in place since January 2021
South Africa	28.5	28.3	Ratification of the Kigali Amendment to the Montreal Protocol in 2019. Gradual decrease in net ODS consumption, with target to phase out emissions by 2030 within reach. HFC licensing system in place since April 2022. Update of Air Quality Law in June 2022, as part of the National Environmental Management Laws Amendment Act.

* PM2.5 emissions are reported in micrograms per cubic metre. The latest year available for all countries from one consistent report is the year 2019. More recent data from various sources is included in the country reports (Appendix D).
Sources: PM2.5 emissions – OECD data, air pollution exposure; main developments – UNEP and reports from national ministries.

There is no evidence that the implementation of the EPA has influenced addressing air pollution, but the combined support from international donors seems to have been a significant factor, given the number of projects conducted and the share of reports produced with support from donors. All countries have since the start of the EPA ratified the Kigali amendment to the Montreal Protocol and are actively reporting their net ODS consumption.

The policy and regulatory framework to tackle air pollution remains weak in most SADC EPA States. In Botswana, Eswatini, Lesotho, Mozambique and Namibia, any policy and regulatory measures predate the EPA. In South Africa, the Air Quality Act of 2004 was updated several times, in 2014, 2020, 2022 and 2023. The 2020 amendment updated the emission standards and the 2023 amendment, which was issued in response of a court order, the Act was amended to include regulations for implementing and enforcing priority area air quality management plans for comment.

7.3 Natural Resources

All SADC EPA States are rich in natural resources, and these significantly contribute to their GDP. There are strong similarities, but also significant differences. Most Partner countries are mining diamonds (South Africa, Botswana, Lesotho and Namibia) and coal (South Africa, Mozambique, Eswatini and Botswana). Nearly all countries have additional mineral resources, although not all are currently being mined. In some countries (e.g., Lesotho and Mozambique) mining activities are said to be a main source of water pollution.

Lesotho has high water resources and its exports to the highly water stressed country of South Africa contribute around 10% to the country's GDP (see further details in section 7.5).

All of the SADC EPA States have significant forest area but have challenges with protecting these areas. Most countries had a decrease in their forest area as percentage of the land area in recent years, despite some countries having defined explicit targets for reforestation. Eswatini was the only Partner country that saw an increase in forest area since joining the EPA. All countries defined targets to increase the proportion of forest area located within legally established protected areas and have made progress, yet not up to the levels targeted in their national policy plans. Mozambique signed Emission Reduction Payment Agreements with the Carbon Fund of the Forest Carbon Partnership Facility (FCPF) in 2019 and has now become the first country in the world to receive payments from FCPF for reducing carbon emissions from deforestation and forest degradation.

Botswana, Eswatini and Mozambique are signatories to the Glasgow Leaders' Declaration on Forests and Land Use. South Africa, Namibia and Mozambique have made commitments to tackle deforestation. While South Africa has committed to a net increase in afforested land of about 10,000 ha per year in 2020-2030, Namibia has committed to reducing the deforestation rate by 75% by 2030. Mozambique has committed to halt and reverse forest loss and land degradation by 2030. Mozambique also has a number of laws and regulations covering forest management, wood harvesting, processing and trade. No causal links could be established between the EPA and these developments though. Moreover, implementation and enforcement of laws and regulations remains weak.

On the other hand, policy frameworks in Botswana and Eswatini remain inadequate, and no policy changes have occurred since the EPA was signed. This may change in the near future, given the adoption of the EU Regulation on deforestation-free products in June 2023 that promotes the consumption of 'deforestation-free' products and requires that operators or traders placing commodities on the EU market or exporting from the EU prove that the products do not originate from recently deforested land or have contributed to forest degradation.

In the context of mining, Namibia has formulated policies to increase the protection of natural resources from mining activities. South Africa's legislative, policy and regulatory framework for mineral resources and minerals industry predate the EPA.

7.4 Biodiversity & Wildlife

The SADC EPA States are home to five out of the 36 recognised biodiversity hotspots in the world, the earth's most biologically rich – yet threatened – terrestrial regions. All six Partner countries have a rich floral and faunal diversity but unfortunately also share the characteristic that their biodiversity is threatened. Common threats are agricultural expansion, alien invasive plant species and unsustainable grazing and resource harvesting. All Partner countries report that climate change is a further threat to their biodiversity, with drought, flooding and forest fires destroying the home of many threatened and endangered species.

Another shared characteristic is that the SADC EPA States have prepared forest management plans and adopted sustainable forest management strategies, but lack of capacity has limited the uptake, monitoring and enforcement of such strategies. All SADC EPA States except Botswana, where no explicit targets have been set, have adopted targets to increase forest cover and/or legally established protected areas, but again capacity constraints are a barrier to reaching targets.

Wildlife crime was identified as a severe threat to biodiversity in Namibia and South Africa, where there has been an increase in registered cases of wildlife crimes involving high-value species over the years. Namibia has taken a range of measures to tackle wildlife (elephant, rhino and pangolin) crime, including establishing an Environmental Crimes Unit in the Office of the Prosecutor-General in 2019 and holding held Special Courts dedicated to wildlife cases. Attempts to deal with wildlife crime cases as quickly as possible however face challenges due to a rapidly growing number of new cases and the need to allocate resources to new cases rather than to older ones. Similarly, South Africa has taken actions to protect rhinos such as anti-poaching efforts, targeted investigations to address internal corruption and wide-scale dehorning of rhinos in reserves targeted by poachers. However, poaching syndicates shift to other reserves, posing newer challenges in protecting these high-value species.

All SADC EPA States have formulated National Biodiversity Strategy and Action Plans (NBSAPs), although Botswana and Lesotho have yet to formulate their second NSBAPs. Only Eswatini's second NBSAP was prepared following the start of application of the EPA. Eswatini, Lesotho, Mozambique and South Africa have also submitted the Sixth National Report to the Convention on Biological Diversity (CBD). There are no known policy changes since the start of the EPA in any of the Partner countries.

Table 23 summarises the main developments in biodiversity, the most significant challenges identified and achievements in addressing these challenges since the implementation of the EPA.

Table 23: Overview of main developments in biodiversity and wildlife

Country	Forest area as % of total land area 2015		Number of threatened species
	2016	2020	
Botswana	27.75	26.92	35
Eswatini	28.65	28.93	47
Lesotho	1.14	1.14	20
Mozambique	47.85	46.73	545
Namibia	8.41	8.06	153
South Africa	14.18	14.06	905

Sources: Forest areas – FAO Global Forest Resources Assessment 2020, Number of threatened species – IUCN Red List of Threatened Species, https://www.iucnredlist.org/statistics

Changes in indicators since applying the EPA are relatively limited. All SADC EPA States ratified the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES), the Ramsar Convention on Wetlands and the Conservation of Migratory Species of Wild Animals, the CBD, the Cartagena Protocol, and the Nagoya Protocol. All ratifications took place prior to the start of application of the EPA, and so did nearly all of the national policies and regulations.

7.5 Water

There are significant differences between the SADC EPA States in terms of the availability of water and access to drinking water. Table 24 shows that Eswatini and South Africa have significant levels of water stress, while the other countries only require a small portion of their annual freshwater resources. Statistics in Eswatini do not show a significant increase, but that likely is because of the lack of accurate estimates. In South Africa the situation is aggravating rapidly: Where the water stress was less than 41% in the year 2000, it

increased to nearly 47% in 2009, to 60% in 2015, and to 65% in 2020. Because nearly all of the country's surface water has already been developed (Sixth National Report to the CBD, 2018), South Africa is addressing the issue of water stress by importing water from Lesotho. The first phase of the Lesotho High Water Project (LHWP) was completed in 2003, providing 780 million m^3/year. The second phase of the project, possibly completed by 2027, will bring the total supply up to 1,260 million m^3/year (LHWP.org, undated). The LHWP has brought Lesotho significant income and, according to the World Bank, it is expected to be the main driver of GDP growth in 2023-25 (World Bank, 2023). At the same time, there are media reports saying that the project is aggravating local water stress in areas in the vicinity of dams in Lesotho (DW.com, 2023 and The Water Project.org, undated). This is being addressed by building further dams, such as the Metolong dam project (World Bank, 2020).

Table 24 also illustrates the large differences in access to drinking water, with Mozambique being on the low end of the range with only an average of 63% of the population having access to drinking water, and Botswana and South Africa on the higher end of the range with respectively 93% and 94% of the population having access to drinking water. Mozambique recognises the need to increase access to water and end access inequity for water. Increasing access to basic water services by 2035 is a goal under the National Strategy for Development (2015-2035), and the Action Plan for the Implementation of the Sustainable Development Goals in the Water Supply and Sanitation Sector 2015-2030 prioritises increasing household access to safely managed drinking water and sanitation services by 50%. A shared characteristic of all Partner countries is that the access to drinking water has increased since the start of the EPA and that the access is significantly lower in rural areas than in urban areas.

Table 24: Overview of main developments in water

Country	Level of water stress*	Percentage of population with at least basic access to drinking water		Main developments in implementation of MEAs and main policy changes since start of EPA.
	2020	2015	2022	
Botswana	2.31	89	93	No known policy changes since start of EPA**
Eswatini	77.56	67	73	Formulation of the Water Policy in 2018
Lesotho	2.57	71	74	No known policy changes since start of EPA.
Mozambique	1.75	49	63	Formulation of the 2018 National Master Plan for Water Resources Management
Namibia	0.86	83	86	Review and update of the National Integrated Water Resources Management Plan commenced in 2021
South Africa	65.03	92	94	Third National Water Resources Strategy published 1 Sept 2023, aiming to reduce water demand and further increase administrative efficiency by reducing the number of water management areas (WMA) to six.

* Defined as freshwater withdrawal as a proportion of available freshwater resources.
** Botswana is understood to have developed a water policy, but the date or status of the policy is not known.
Sources: Level of water stress – UNICEF; access to drinking water – Washdata.org; main developments – UNEP and reports of national ministries.

With the exception of Mozambique, changes in indicators since the start of application of the EPA are relatively limited. There is, however, no evidence that the EPA has influenced the increase in access to drinking water in Mozambique.

7.6 Waste & Chemicals

Statistics on waste generation and the types of waste are scarce, outdated or unreliable in Botswana, Eswatini, Lesotho and Mozambique (see Table 25). However, a qualitative analysis of the problem suggests that all SADC EPA States are dealing with the problems of high volumes of waste, low levels of access to waste collection services, low capacity of managing waste, and high costs involved in waste management. This is further exacerbated by the lack of proper disposal technologies and methodologies, a weak policy

and institutional framework for waste management, and poor implementation or enforcement where policies exist.

Table 25: Overview of main developments in waste

Country	Waste Generation	Main developments in implementation of MEAs and main policy changes since start of EPA
Botswana	N.A*	Approval of the Integrated Waste Management Policy in 2021
Eswatini	Annual waste per person per day in 2022 was 0.65 tonnes	No known significant policy changes, submitted national report to the Basel Convention in 2019
Lesotho	N.A*	Issued integrated waste management strategy in 2022, submitted national report to the Basel Convention in 2019
Mozambique	7,247 tons of waste per day in 2012*	No known significant policy changes, submitted national report to the Basel Convention in 2021
Namibia	Annual solid waste generation at between 75 and 550 kilotons per year*	Formulated National Solid Waste Management Strategy in 2018, submitted national reports to the Basel Convention in 2020 and 2019.
South Africa	About 122 million tonnes of waste per year	Publication of the Waste Tyre Regulations in 2017, Amendment of Plastic Bag Regulations in 2021, Adoption of Norms and Standards for Organic Waste Composting in 2021, submitted national reports to the Basel Convention in 2021 and to Stockholm Convention in 2022.

* Statistics are scare, outdated or unreliable in these countries.
Source: UNFCCC reporting and reports of national ministries.

Changes in indicators since the start of application of the EPA cannot be assessed due to the absence, respectively poor quality, of data. All Partner countries have ratified the Basel Convention on the Control of Transboundary Movements of Hazardous Wastes and Their Disposal, the Stockholm Convention on Persistent Organic Pollutants (POPs) and the Rotterdam Convention on Hazardous Chemicals and Pesticides in International Trade. Except for Eswatini and Mozambique, the other countries have also ratified the Ban Amendment to the Basel Convention. Only Mozambique has ratified/acceded to the Bamako Convention on the Ban of the Import into Africa and the Control of Transboundary Movement and Management of Hazardous Wastes within Africa. Eswatini and Lesotho are both signatories but have not ratified the Convention or acceded to it.

National reporting remains uneven. Only South Africa and Mozambique are up to date with their reporting obligations under the Basel Convention. Botswana lags far behind, with the last national reporting in 2006. Only South Africa is up to date on the reporting under the Stockholm Convention. Mozambique's reporting is due since 2009, while Botswana, Eswatini, Lesotho and Namibia are yet to submit any reports.

7.7 Summary and opportunities

The review of the evidence undertaken by the evaluation team to date indicates that the EU-SADC EPA overall has not had major impacts on environmental issues both in the EU and the SADC EPA States. Some effects seem to have resulted from increased exports by the latter to the EU, but no major structural effects have been identified in relation to a diversification of exports. The review of major environmental issues and major exporting sectors has identified important ongoing environmental concerns such as increased GHG emissions (especially South Africa) as well as increased pressure on land use and water use from increased production. The levels of increase of exports from the SADC EPA States to the EU as a result of the EPA, however, have been fairly limited and therewith GHG emission increase can also only be attributed to the EPA in a limited manner. There are continued strong environmental concerns linked to mining. In this context, the ability of countries to establish and maintain safe and sustainable supply chains of critical raw materials would have to be thoroughly assessed.

The Parties have ratified or acceded to MEAs (see details in **Appendix D1**) and also made improvements in governance and implementation of policies resulting from MEAs. The review of the evidence, however, has not revealed a clear causal relation with the EPA, as

other major developments may have also triggered these improvements. Examples are the energy crisis in South Africa that has expedited the implementation of the Renewable Energy Independent Power Producer Procurement Programme. In April 2023, the South African Government announced the intended procurement of 15 GW of renewable energy under the next bid window of this programme.

Similarly, Namibia's growing diversification and deployment of domestic renewable energy sources is linked to South Africa's electricity and economic crisis. Namibia is dependent on imports of electricity from South Africa and has close economic links with South Africa.

The EU and other international partners have provided support in several areas through development cooperation, for example in support to decarbonisation of the energy sector in South Africa through the Just Energy Transition Partnership. The other SADC EPA States also aim to increase the share of renewable energy in their energy production, so also for these countries there seems a potential for enhanced knowledge exchange and technology transfer in this area between the EU and the Partner countries, as well as targeted climate finance. SADC EPA States could also benefit from capacity building in the area of waste management, as this is a growing concern in most Partner countries.

8 HUMAN RIGHTS EFFECTS OF THE EPA

This section provides a preliminary analysis of the impacts of the EU-SADC EPA on human rights. The scope of this analysis is defined in the Terms of Reference (ToR) for the evaluation: to analyse the impact of implementation of the EPA on human rights, with focus on gender equality and rights to property, including land tenure and risk of "land grabbing". The evaluation considers the International Bill of Rights (the Universal Declaration on Human Rights, UDHR, and two Covenants) as a standard against which the analysis is performed, supplementing the rights set out in the International Bill of Rights with references to the Charter of Fundamental Rights (CFR) of the EU, core international human rights treaties, relevant regional human rights instruments, and where relevant, domestic, and customary international law.[103]

It is beyond the scope of the evaluation to consider whether the Parties to the Agreement are complying with the essential elements clause or whether "appropriate measures" should be taken under Article 96 of the Cotonou Agreement.

The analysis follows the methodology outlined in the Inception Report. Step 1 (baseline analysis) is presented in **Appendix E1**, where in addition to an overview human rights profiles have been prepared for each of the partner countries. The profiles contain the international legal obligations of the Parties regarding human rights, a summary of the national human rights framework, and a summary of implementation issues. Particular attention is given to the position of specific vulnerable groups. The profiles aim to establish the international human rights obligations and set the scene regarding the enjoyment of the relevant human rights in the partner countries, identifying conditions of stress and vulnerability prior to the start of application of the EU-SADC EPA, and to prepare the basis for a targeted assessment of the human rights impacts. Potential links to the Agreement are not included in the profiles. The analysis is based on literature review and relevant indicators.

The detailed screening and scoping exercise (Step 2 of the analysis), which covers the overall effects of the EU-SADC EPA on human rights, focuses primarily on the impact of the EU-SADC EPA on human rights in the SADC EPA States. Due to the asymmetry in the economic size between the EU and the partner countries, the results of the economic modelling show that the EPA had a larger relative economic impact on SADC partners than on the EU. This also implies that the impacts on human rights accrue primarily in the SADC EPA States and not in the EU.

The detailed analysis of the overall effects of the EU-SADC EPA on human rights in each of the SADC-EPA States is presented in **Appendix E2**, by country. This chapter provides the main findings.

As the EPA does not entail any binding commitments on the Parties towards human rights issues, a direct causal link from the Agreement's provisions to human rights and labour rights developments cannot be drawn. However, human rights may have been affected

[103] The ToR mention several legal instruments and, where relevant, customary international law as a benchmark against which the impact of the implementation of the EPA should be measured. Article 2(1) of the Agreement states: "This Agreement is based on the Fundamental Principles, as well as the Essential and Fundamental Elements, as set out in Articles 2 and 9, respectively, of the Cotonou Agreement. This Agreement shall build on the achievements of the Cotonou Agreement, the TDCA and the previous ACP-EC agreements in regional cooperation and integration, as well as economic and trade cooperation". The Cotonou Agreement, in its preamble, refers to such specific legal instruments as the UDHR, the Covenants on Civil and Political Rights (ICCPR) and Economic, Social and Cultural Rights (ICESCR), the Convention on the Rights of the Child (CRC), the Convention on the Elimination of all forms of Discrimination against Women (CEDAW), the International Convention on the Elimination of all forms of Racial Discrimination (ICERD), the 1949 Geneva Conventions, the 1954 Convention relating to the status of stateless persons, the 1951 Geneva Convention relating to the Status of Refugees and the 1967 New York Protocol relating to the Status or Refugees.

due to the economic changes brought about by the EPA. Based on the results of the economic modelling, the overall impact on human rights is considered to be minor but positive. At sector level, we identify a mixed impact on some human rights. Whether an impact is major or minor is based on the causal chain methodology, linking social, human rights, and environmental effects to economic changes in the production structure. Next to that, pre-existing vulnerability and availability of effective mechanisms to mitigate even small shocks are considered in evaluating the minor/major degree of the impact.

Table 26 summarises the preliminary findings on the possible impact which the EPA may have had on specific human rights as a result of the economic changes induced by the Agreement. The following sections provide more details for each of the rights considered.

Table 26: Overview of human rights that may have been affected by the EU-SADC EPA in SADC EPA States

Human right (normative framework) Country	Type of impact	Scale/ direction of impact	Potentially affected vulnerable population groups
Right to an adequate standard of living (UDHR, Art. 25; ICESCR, Art. 11; Committee on Economic, Social and Cultural Rights (CESCR) General Comments No. 4, 7, 12, 15 & 19; CFR, Art. 34)			
Botswana[104]	Direct	Minor (+/-)	Workers from sectors affected by employment changes, especially workers from such vulnerable population groups as women, children, persons with disabilities, indigenous peoples, migrant workers
Eswatini	Direct	Minor (+/-)	Workers from sectors affected by employment changes, especially workers from such vulnerable groups as women, persons with disabilities, migrant workers, children.
Lesotho	Direct	Minor (+/-)	Workers from sectors affected by employment changes, especially workers from such vulnerable groups as women, children, persons with disabilities, migrant workers
Mozambique[105]	Direct	Minor (+/-)	Workers from sectors affected by employment changes, especially workers from vulnerable population groups
Namibia	Direct	Minor (+/-)	Workers from sectors affected by employment changes, especially workers from vulnerable population groups
South Africa	Direct	Minor (+/-)	Workers from sectors affected by employment changes, especially workers from vulnerable population groups
Right to food (UDHR, Art. 25; ICESCR, Art. 11; CESCR General Comment No.12; ACHPR/Res.431(LXV)2019)			
Eswatini	Indirect	Minor	
Lesotho	Indirect	Minor	
Mozambique	Indirect	Minor	
Namibia	Indirect	Minor (+)	Vulnerable population groups affected by food insecurity
Right to water (UDHR, Art. 25; ICESCR, Art.11; CESCR General Comment No.15; African Charter on Human and Peoples' Rights (ACHPR) Guidelines on the Rights to Water in Africa; CEDAW, Art. 14(2); CRC, Art. 24(2))			
Botswana	Indirect	Minor (+)	Populations living in proximity to water-polluting/water-intensive economic activities
Eswatini	Indirect	Minor (+/-)	Populations living in proximity to water-polluting/water-intensive economic activities (populations in the Shiselweni and Lumbombo regions)
Lesotho	Indirect	Minor (+/-)	Populations living in proximity to water-polluting/water-intensive economic activities
Mozambique	Indirect	Minor	
Namibia	Indirect	Minor (-)	Local communities in rural areas, communities living in the proximity to production sites
South Africa	Indirect	Minor (+/-)	Local communities in rural areas, communities living in the proximity to production sites
Right to join and form trade unions (incl. right to collective bargaining) (UDHR, Art. 20; ICCPR, Arts. 21 & 22; CFR, Art. 12; ILO Conventions 87 & 98)			
All SADC EPA States	Direct	No impact	
Right to just and favourable conditions of work (UDHR, Arts. 23 & 24; ICESCR, Arts. 6 & 7; CESCR General Comment No.23; CEDAW, Art, 11; CRPD, Art. 27; CFR, Arts. 15 & 31; ACHPR, Art. 15)			
All SADC EPA States	Direct	No impact	
Freedom from discrimination (UDHR, Art.2; ICCPR, Art. 26; ILO Conventions 100 & 111)			
All SADC EPA States	Direct	No impact	

[104] Botswana has not ratified the ICESCR.
[105] Mozambique has not ratified the ICESCR.

Human right (normative framework) Country	Type of impact	Scale/ direction of impact	Potentially affected vulnerable population groups
Freedom from slavery and forced labour, incl. child labour (UDHR, Art. 4; ICCPR, Art. 8; ILO Conventions 29 & 105, 138 & 182, Protocol 029; CFR, Art. 5; CRC; ACHPR, Art. 5)			
Botswana	Direct	No impact	Children working in the cattle sector
Eswatini	Direct	No impact	
Lesotho	Direct	No impact	
Mozambique	Direct	Minor (tbc)	Children working in the tobacco sector
Namibia	Direct	Minor (tbc)	Children working in fishing and agriculture
South Africa	Direct	No impact	
Right to participate in public affairs (ICCPR, Art. 25; HRC General Comment No. 25)			
All SADC EPA States	Direct	No impact	
Women's rights (gender equality) (CEDAW; ICCPR & ICESCR, Art.2; Protocol to the ACHPR on the Rights of Women in Africa (Maputo Protocol))			
Botswana	Direct	Minor (-)	Women working in textile and garment sectors
Eswatini	Direct	Minor (-)	Women working in textile and garment sectors
Lesotho	Direct	Minor (+/-)	Women working in textile and garment sectors
Mozambique	Direct	No impact	
Namibia	Direct	Minor (+)	Women working in agricultural sectors
South Africa	Direct	Minor (-)	Women working in the textiles and garment sectors
Indigenous peoples' rights, incl. land rights (United Nations Declaration on the Rights of Indigenous Peoples (UNDRIP), Arts. 3, 19, 25 & 26; ILO Convention 169[106]; CESCR General Comment No. 26)			
Botswana	Indirect	Minor (+)	Basarwa/San communities working in the cattle sector
Right to own property (land rights) (UDHR, Art. 17; CFR, Art. 17; ACHPR, Art. 14)			
Mozambique	Indirect	Minor	Local communities living in the proximity to extraction sites
South Africa	Indirect	Minor	Local communities

Source: own compilation.

8.1 Right to an Adequate Standard of Living

The impact of the EU-SADC EPA on the right to an adequate standard of living could have materialised through the overall effects of the EPA on welfare, GDP and wages, as well as sectoral employment changes. Employment and income are critical factors that contribute to an individual's ability to enjoy an adequate standard of living as defined in Article 25 of the UDHR and Article 11 of the ICESCR.

Botswana

As already noted in section 6.1, the overall impact of the EPA on GDP and wages in Botswana has been limited. This suggests a minor overall impact on the right to an adequate standard of living.

At sector level, as also noted above (and see Table 2 in Appendix C2), minor positive employment changes in the sugar, other crops, cattle, meat (both ruminant and others), and "other" manufacturing sectors suggest a minor positive impact on the right to an adequate standard of living of workers from these sectors. Conversely, minor negative employment changes in the textiles, apparel, leather, rubber and plastics products, and motor vehicles and parts sectors suggest a minor negative impact on the right to an adequate standard of living of workers from these sectors.

The fact that wages marginally increase overall, suggests that workers losing their jobs, are pulled into other sectors for better job opportunities. However, workers in negatively affected sectors may be made redundant which may affect their ability to pay for housing, food, and health care, or to cover other expenditures of their families which are necessary for a dignified life. Much of the actual effect will depend on the ability in practice for workers in negatively affected sectors to move to growing sectors.

[106] Botswana has not ratified ILO Convention No. 169.

Eswatini

The overall impact of the EPA on GDP and wages in Eswatini has been limited (see sections 5.4.1 and 6.1). The modelling results show a decrease of real GDP by 0.48% and wages by 0.19% for skilled workers and 0.13% for unskilled workers, and a zero impact on economic welfare, suggesting an overall marginal impact on the right to an adequate standard of living.

At sector level (see Table 3 in Appendix C2), minor positive employment changes in the coal (1.2% increase in employment for skilled workers and 1% for unskilled workers), wood and products (0.6% increase for both categories of workers), chemicals (0.7% increase for both categories of workers), and metal products (0.8% increase for both categories of workers) suggest a minor positive impact on the right to an adequate standard of living for workers in these sectors.

Conversely, minor negative employment changes in the textiles (-1.7% for skilled workers and -1.8% for unskilled workers) and wearing and apparel (-6.1% for skilled workers and 6.2% for unskilled workers) sectors suggest a minor negative impact on the right to an adequate standard of living of workers from these sectors, especially if these find it difficult to move to other sectors.

Lesotho

The overall impact of the EPA on welfare, GDP, and wages in Lesotho has been positive. The economic modelling finds that real GDP for Lesotho has improved by 0.14% (more than in any of the SADC EPA States), real wages increased by 1.1% for both skilled and unskilled workers, and economic welfare increased by €2 million. Taken together, these results suggest a small positive impact on welfare and the right to an adequate standard of living overall.

At sector level (see Table 4 in Appendix C2), small positive employment changes in the textiles (1.7% for both skilled and unskilled workers) and fibres crops (0.6% for both categories of workers) sectors suggest a minor positive impact on the right to an adequate standard of living for workers in these sectors. Conversely, small negative employment changes in the apparel and leather sectors (by 1.3% and 1.9% respectively, for both categories of workers) suggest a minor negative impact on the right to an adequate standard of living of workers from these sectors.

Mozambique

The overall impact of the EPA on GDP and wages in Mozambique is positive. The economic modelling analysis finds that real GDP for Mozambique improved by 0.11%, the highest change among the six SADC EPA States, and wages have increased by 0.3% for skilled workers and by 0.4% for unskilled workers; however, due to price effects, economic welfare marginally decreased (by €10 million). Taken together, these indicators suggest a small positive impact on welfare and the right to an adequate standard of living overall.

At sector level, limited positive employment changes in the coal (0.6% for skilled workers and 0.9% for unskilled workers), oil (0.6% for skilled workers and 0.5% for unskilled workers), gas (0.7% for both categories of workers), beverages and tobacco products (0.5% for both categories of workers), and leather sectors (0.6% for both categories of workers) suggest a minor positive impact on the right to an adequate standard of living for workers in these sectors.

In contrast, small negative employment changes in the wheat (-0.6% for both categories of workers), ruminant meat (-1.6% for both categories of workers), other meat (-9.0% for both categories of workers), dairy products (-1.5% for both categories of workers), paper

and paper products (-1.9% for skilled workers and -1.8% for unskilled workers), and rubber and plastics products (-1.3% for both categories of workers) suggest a minor negative impact on the right to an adequate standard of living of workers in these sectors, if they cannot find jobs in other sectors. It should be noted that the share of labour of the most affected sector by far, "other meat" (i.e. non-ruminant meat), amounts to only 0.03% of total labour in the country (see Table 5 in Appendix C2).

Namibia

The overall impact of the EPA on welfare, GDP, and wages in Namibia has been positive. The economic modelling results show that the increase in real GDP is recorded at 0.07%, wages increased by 1.1% for unskilled workers and 0.3% for skilled workers, and economic welfare increased by €149 million, the second largest increase across all six SADC EPA States. This suggests a slightly positive impact on welfare and the right to an adequate standard of living overall.

At sector level (see Table 6 in Appendix C2), the EPA has had a wide-ranging, mostly positive, impact on labour. Results of the economic modelling indicate employment changes in almost all economic sectors in Namibia (covering 95% of value added). The most prominent positive changes (above 5%) occurred in the other grains (by 4.7% for skilled workers and by 5.2% for unskilled workers), vegetables, fruit and nuts (by 5.3% and 5.9% respectively), other crops (by 4.7% and 5.3%), fishing (by 5.1% and 5.7%), coal (by 12.8% and 10.7% - although this is a very small sector), ruminant meat (by 8.7% and 8.6%), and other prepared food sectors (10.1% and 10%). Creation of jobs in these sectors suggest a positive impact on the right to an adequate standard of living of the workers in these sectors.

Negative employment changes above 5% have been recorded in other transport equipment sector (-8.2% for skilled workers and 8.5% for unskilled workers), suggesting a negative impact on the right to an adequate standard of living of workers in this sector; however, based on information provided by stakeholders, the presence of this sector as represented in the CGE model might be erroneous; it has been stated that there is no transport equipment industry in the country to speak of, and accordingly the economic model findings for this sector might be a statistical artefact; further research into this is necessary.

South Africa

The overall impact of the EPA on welfare, GDP, and wages in South Africa has been limited. The economic modelling finds an increase in real GDP of 0.03%, an increase in wages (by 0.2% each for unskilled and skilled workers), and an increase in economic welfare by €293 million. This suggests a slightly positive impact on welfare and the right to an adequate standard of living overall.

At sector level (see Table 7 in Appendix C2), minor positive employment changes can be observed across most agricultural sectors – wheat (by 1.9% for both skilled and unskilled workers), other grains (by 1% for both categories of workers), vegetables, fruit and nuts (by 2.3% for both categories of workers), and cattle (by 2.1% for both categories of workers). The most prominent employment changes are found in the sugar sector where, as a result of the EPA, employment has increased by 6.3% for both categories of workers. In manufacturing, jobs were created in the motor vehicles and parts, and other transport equipment sectors (by 2.5% and 1.2% respectively, for both categories of workers). The creation of jobs in these sectors suggests a positive impact on the right to an adequate standard of living of the workers in these sectors.

On the other hand, minor negative employment changes in the textiles (-0.6% for both skilled and unskilled workers), apparel (-2.7% for both categories of workers), leather

(-1.3% for both categories of workers), rubber and plastics products (-0.8% for both categories of workers) imply a minor negative impact on the right to an adequate standard of living of workers from these sectors, if they found it difficult to move to other sectors.

8.2 Right to Food

No effects of the EPA were identified for **Botswana** and **South Africa**.

Eswatini

In 2021, approximately 58.9% of Eswatini persons lived below the national poverty line, with the highest poverty in the rural areas of Lubombo and the Shiselweni regions (United Nations, 2021). Prolonged droughts in the last 10 years affected food security. About 26% of children under five are affected by chronic malnutrition (WFP, 2023), and vulnerable groups rely on the World Food Programme (WFP) and other donors to provide household food rations (Bertelsmann Foundation, 2022). Without charity organisations, food insecurity would be considerably worse.

The economic modelling results point to no significant changes in production in agricultural sectors resulting from the EU-SDC EPA. While the simulation results show small production increases across all agricultural sectors, Eswatini remained a net food importer. According to recent reports of the WFP, the vulnerable population of Eswatini continues to rely on food programmes (WFP, 2022). No further impact of the Agreement has been identified on this right in Eswatini.

Lesotho

While the national poverty rate in Lesotho declined from 56% in 2002 to 49% in 2017, and food poverty rates also declined from 34% to 24% over the same period, the Integrated Food Security Phase Classification reports that, in the current period (from July to September 2023), approximately 245,000 persons from rural areas in Lesotho face high levels of acute food insecurity (IPC, 2023). An estimated 75% of the population are either poor or vulnerable (Bertelsmann Foundation, 2022a). Poverty is particularly acute in the mountainous areas and other remote areas (United Nations, 2019; 2019a). According to a 2021 World Bank report, the geographical characteristics of Lesotho make it vulnerable to the impacts of climate change. Negative effects of climate change come from the increased frequency of droughts, increased rates of soil erosion and desertification, and reduced soil fertility, which negatively affects agricultural activities vital for food security and livelihoods (World Bank Group, 2021).

The economic modelling results point to no significant changes in the production of agricultural sectors in Lesotho due to the EU-SDC EPA. While very small production increases are calculated by the modelling across all agricultural sectors, with the most prominent increase, of 0.6%, in fibres crops, Lesotho remained a net food importer. According to the African Development Bank, about 80% of the food consumed in Lesotho is imported (African Union, 2023). No further impact of the Agreement has been identified on this right in Lesotho. The EU continued, however, to support Lesotho as one of the main donors to the World Food Programme, bringing the total contributions to €7 million in the period from 2017-2021 (EEAS, 2021).

Mozambique

While the national poverty rate in Mozambique declined from 51.7% in 2008 to 46.1% in 2014 (World Bank, 2023), nearly half of the population remains below the poverty line (WFP, 2023a). A recent country brief of the World Food Programme states that Mozambique is classified as one of the countries in the world most affected by extreme weather hazards. Acute food insecurity has been on the rise in recent years in northern

Mozambique due to conflict and recurring displacement and economic and climate related shocks (WFP, 2023a). The latest Integrated Food Security Phase Classification reports that in the period from November 2022 to March 2023, approximately 3.15 million people in Mozambique were in need of urgent action (IPC, 2023a). Around 38% of children suffer from chronic malnutrition (IFAD, 2023).

The economic modelling results point to no significant changes in production in agricultural sectors in Mozambique as a result of the EU-SDC EPA. Production of agricultural products either did not change or faced a marginal decrease. The most prominent decrease is calculated by the model for the production in the wheat sector (-0.9%). According to the International Fund for Agricultural Development, a specialised agency of the United Nations, Mozambique remains a net importer of food (IFAD, 2023). No further impact of the Agreement has been identified on this right in Mozambique. The EU continued to support the World Food Programme's Mozambique operations as a donor and contributed over €52 million since 2018 to help alleviate hunger. In 2023, the EU contributed €8.6 million to intensify efforts in addressing food security amidst conflict in northern Mozambique (WFP, 2023b).

Namibia

Namibia has been successful in reducing poverty, as the poverty rate halved from 1993 until 2016 (World Bank, 2021a). However, the projected international poverty rate remains high (18.4%) (World Bank, 2023), and many households remain food insecure (United Nations, 2021a; 2021b). According to the 2022 Global Hunger Index, Namibia suffers from a serious level of hunger (78th out of 116 countries) (WFP, no date). A recent update from the IPC (from September 2023) states that around 579,000 people in Namibia (22% of the total population) experience high levels of acute food insecurity (IPC, 2023a).

The economic modelling results show that production in agricultural sectors following the start of application of the EU-SDC EPA has increased in all agricultural sectors except the rice and the oil seeds sectors. Most prominent changes have been recorded in the other grains, vegetables fruit and nuts, and other crops sectors, marking 5%, 5.8% and 4.4% respectively. The FAO reports that the large domestic cereal outturns (other grain sector) in 2021 and 2022 have lessened the import needs in 2022 and 2023 (FAO, 2022). This suggests that increased production in agricultural sectors as a result of the EPA could have contributed to lower food insecurity in Namibia. Even though the prevalence of acute food security is expected to remain, this is not because of insufficient production but because of increased food prices and prices for fuel (FAO, 2022).

8.3 Right to Water

The impact of the EPA on the right to water in SADC EPA States could have materialised through an increase or decrease in production in water-intensive and water-polluting economic sectors (such as mining sectors, various agricultural sub-sector, textiles, apparel, leather, rubber and plastics products, motor vehicles and parts, and others), affecting the availability and quality of water, two criteria from the Availability, Accessibility, Acceptability and Quality (AAAQ) framework defined in the CESCR General Comment No. 15 on the right to water.[107]

Botswana

According to several studies, the fashion industry has three main negative environmental impacts related to water: high water usage, high levels of chemical pollution, and high

[107] The right to water is also related to the right to the highest attainable standard of health (Art. 12(1) ICESCR and the rights to adequate housing and adequate food (Art. 11(1) ICESCR).

levels of physical microfiber pollution (Fair Planet, 2022; Bailey et al., 2022; European Parliament, 2019). The leather sector is also reported to be a highly water-polluting sector as wastewater from tanneries contains chromium which pollutes waterways and groundwater, affecting people's health. Alternatives to chrome tanning and application of eco-friendly techniques were not common in Sub-Saharan African states during most of the EPA period (Oruko et al., 2020).

According to the economic modelling results, the EPA has led to a decrease in production in the textiles (-1.9%), wearing and apparel (-2.4%), and leather (-0.8%) sectors in Botswana, suggesting less water pollution from economic activities in these sectors. These decreases are notable considering that the share of Botswana's textile production that is directly destined to the EU is limited: A large share of textile exports from Botswana (approximately 89%) go to South Africa and other countries in Africa (Textile Infomedia, 2023).

Other major consumers of water have also seen an output decrease in Botswana because of the EPA such as the automotive sector (-1.8%), as well as the rubber and plastics products sector (-0.5%), another water-polluting economic sector in the country (Mmereki, 2019).

Based on the model simulations, the impact of the EPA on these water-intensive and water-polluting economic sectors (and consequently, on the right to water) has been slightly positive. Nevertheless, due to the lack of related data on actual water use and pollution from the concerned sectors in Botswana it is not possible to establish a more detailed level of the impact.

Eswatini

Eswatini faces multiple environmental challenges, mainly land degradation, inadequate quantity and quality of water resources, air pollution, habitat destruction and loss of biodiversity, waste (including toxic waste), natural hazards (mainly recurring droughts) and climate change (including rainfall variability) (WFP, 2022). Prolonged droughts strain water resources and impact water availability for communities and agriculture. Access to water and sanitation is not consistent, and in rural areas access to potable drinking water remains a challenge, especially in dry places in the mountains (Bertelsmann Foundation, 2022).

A small increase in the production of coal (by 0.7%) could have had a minor negative impact on the availability and quality of water. Coal mining can be water-intensive, as water is often used for activities such as dust suppression and coal washing. Moreover, coal mining and processing can lead to water pollution as runoff from coal mines can contain various contaminants, including heavy metals and pollutants, which can seep into local waterways and negatively affect water quality (Yiwei, 2019). The coal sector is not very big in Eswatini but has recently been revived. It is primarily centred in the western part of the country, specifically in the Shiselweni Region, a region with high levels of poverty. More recently, the Mpaka Coal Mine in the Lumbombo region (also a region with high levels of poverty) has been opened (WhyAfrica, 2021). So while the overall impact is minor, it may have had disproportionate effects on the most vulnerable population groups.

The calculated decrease in production in the textile (-1.8%) and apparel (-6.2%) sectors in Eswatini could have led to a minor positive impact on the right to water of communities living in the proximity to production sites. This is despite the fact that textiles (directly9 destined to the EU market constitute a small share of all the textiles produced in the country, with 98% of exports going to South Africa (World Bank, 2021). Similarly, the limited increase in production in the chemicals sector (by 0.7%) is not likely to have led to a substantial impact on the right to water.

Lesotho

Water availability has improved due to the Lesotho Highlands Water Project. However, the World Development Indicators show that only 42.75% of Lesotho's population used at least basic sanitation services. A total of 68.65% of the population use basic drinking water services (Bertelsmann Foundation, 2022a).

The economic modelling results show a minor increase in production (by 1%) in the water-intensive and water-polluting textile sector as a result of the EU-SADC EPA. At the same time, other water-intensive and water-polluting sectors, such as apparel and leather, have faced a decrease in production (by 1.5 and 1.9% respectively). Lesotho garment companies specialise in the production of denim garments – mostly jeans – which requires a large amount of potable water. The MNN (Centre for Investigative Journalism) reports that some of Lesotho's textile factories try to cut operating costs and release toxic wastewater into water courses, including the Mohokare/Caledon River (MNN, 2023).

Due to the mixed effect of the EPA on production in these water-polluting economic sectors and a relatively small degree of the impact, it is not likely that economic activities under the EPA contributed to a significant impact on the right to water in Lesotho.

Mozambique

Mozambique has overall sufficient surface and groundwater resources. However, water is not evenly available across Mozambique, and some regions in the southern part of the country have issues with water availability during times of drought. Regarding water quality, most water pollution in Mozambique comes from gold and coal mining, agriculture, and inadequate sanitation systems. Mozambique also faces transboundary pollution, as about 54% of its freshwater resources come from upstream countries (USAID SWP, 2021).

The results of the economic modelling do not indicate a significant increase in production in the most water-polluting economic sectors in Mozambique (gold and coal mining and agriculture) as a result of the EPA. Production in almost all agricultural sectors saw marginal changes in production. Production of minerals increased by 0.1% and production of coal by 0.4%. Other sectors that can also be water-intensive and water-polluting (ruminant meat, other meat, paper and paper products, rubber and plastics) all saw a decrease in production as a result of the EU-SADC EPA.

Overall, even a cumulative effect from decreased production in these sectors is not likely to lead to any significant impact of the EPA on the right to water in Mozambique, as reports indicate that the total volume of freshwater withdrawn by major economic sectors is only 1.75% (USAID SWP, 2021).

Namibia

Namibia is highly susceptible to water scarcity (IFRC, 2022), and water resources are further vulnerable to pollution from mining and agricultural activities (JNCC & DEFRA, 2022). Mining operations can release pollutants into water bodies. Agricultural sectors use fertilisers, nitrates, and pesticides which can lead to runoff and leaching of chemicals into water sources. Moreover, both industries are also water intensive.

The economic modelling results show an increase in production both in mining and in agriculture because of the EPA. Coal mining has increased by 8.1%, but as noted above in actual fact the coal industry in Namibia is very small (GIZ, 2022). Therefore, the degree of the impact is likely to be minor or even negligible. Production in agricultural sectors has increased most in the wheat (by 3.5%), other grains (by 5%), vegetables, fruit and nuts (by 5.8%), and other crops (by 4.4%) sectors. The agricultural sectors that faced a decrease in production are the rice and the oil seeds sectors (by 1.2 and 1.6%

respectively). While rainfall is an important source of water for agriculture, especially in the northern parts of the country, Namibian farmers also use other water sources, including groundwater and river water (Ihemba & Esterhuyse, 2020; GIZ, 2022). However, rainwater harvesting is also growing popularity among Namibian farmers (Chemonics, 2021). Overall, given the water footprint of agriculture in Namibia, increase in production in these sectors could have had a cumulative impact on water availability and water quality.

South Africa

South Africa has been facing water shortages since 2015 (DBSA, 2023). Water resources are scarce, and there is inequality in access to water and sanitation, especially for children, women, and marginalised communities living in rural areas (United Nations, 2022). During the UN Universal Periodic Review, stakeholders noted that mining companies tend to operate without a water-use licence and draw water from natural resources that are also providing water to communities (United Nations, 2022a), which sometimes leads to depletion of water resources for whole communities (Human Rights Watch, 2019).

The economic modelling results indicate a decrease in production in economic sectors related to mining due to the application of the EU-SADC EPA. This suggests that the negative impact on water from mining cannot be attributed to the EPA. Similarly, due to the decrease in production in the textiles (-0.8%), apparel (-2.8%), and leather (-1.4%) sectors, negative impacts from these sectors on water cannot be attributed to the EPA. An increase in production can be observed, however, in the sugar, automotive, vegetables, fruit and nuts, wheat, other grains, and cattle sectors (by 6.2%, 1.4%, 2.4%, 1.9%, 1% and 2.2% respectively). Given the size of the industries (Government of South Africa, 2022), their water footprint, and the degree of the impact from the EPA, a negative effect on water from increased activity in these sectors cannot be excluded; further research is needed in the remainder of the evaluation.

8.4 Labour Rights: Right to Just and Favourable Conditions of Work, Right to Join and Form Trade Unions, including the Right to Collective Bargaining, Freedom of Discrimination at Work)

Employment changes triggered by trade under the EPA, in particular loss of employment, could be associated with additional pressure on the rights of workers in the affected sectors. However, a clear direct link with the EPA has not been identified yet for any of the SADC EPA States.

Also, while the EPA's TSD Chapter includes provisions that reaffirm the commitments already made by the Parties under the ILO fundamental conventions that they have ratified, it does not entail any binding commitments on labour rights that would go beyond commitments already made in other contexts. Also, labour rights have not been addressed in the meetings of the TDC held so far; accordingly, no evidence could be found that specific developments on labour rights in the SADC EPA States would have been directly linked to the EPA. Indirect (positive) effects could stem from EU consumer expectations and insistence of EU buyers that SADC EPA State exporters comply with certification schemes on labour rights and working conditions, but these effects remain to be further studied by the evaluation team.

Botswana

The 2023 ITUC Global Rights Index ranks Botswana as a country with systematic violations of rights of workers. This ranking has not changed since 2017 when the EPA entered into force (ITUC, 2023). Despite some employment changes triggered by trade under the EPA, it is not likely that this has led to a significant impact on labour rights in Botswana overall. However, programmes aimed at decent work and improved labour standards in export sectors introduced in Botswana after the EPA came into force could have played a role in

the promotion of labour standards in the country. The impact of the EPA through cooperation under the TSD Chapter is covered in section 4.1.

Eswatini

Despite some employment changes triggered by the EPA, it is not likely that this has led to a significant impact on labour rights in Eswatini. According to the 2023 ITUC Global Rights Index, Eswatini has consistently over the years been among the ten worst countries in the world for working people (ITUC, 2023). In the context of a broader cooperation with Eswatini, the EU has launched a programme to support the implementation of the EU-SADC EPA and to promote job creation in Eswatini through the promotion of public private dialogue which could have played a role in promoting labour rights in the country. The programme contained targeted actions to address shortage of skilled labour and empower youth in vulnerable situations "through basic training, informal learning and economic empowerment" (European Commission, 2021). However, the programme has no direct focus on labour rights.

Lesotho

It is not likely that employment changes triggered by the EPA have led to a significant impact on labour rights in Lesotho due to the limited magnitude of the impact identified by the modelling. The ITUC Global Rights Index for Lesotho deteriorated in 2022, following the killing of trade unionists (ITUC, 2022), and remained low for 2023, indicating systematic violations of labour rights in the country (ITUC, 2023). Major incidents were reported in the garment industry in Lesotho, where women face gender-based violence and harassment (Solidarity Center, 2022).

In 2019, Lesotho ratified the Protocol to the Forced Labour Convention. In March 2023, the Government of Lesotho deposited the instruments of ratification of three ILO conventions: the Labour Relations (Public Service) Convention (No. 151), the Promotional Framework for Occupational Safety and Health Convention (No. 187), and the Violence and Harassment Convention (No. 190). These conventions will enter into force for Lesotho in March 2024. While these are major developments regarding labour rights, the implementation of these instruments still remains to be seen, and there is no evidence that the ratification process was driven by the EPA.

Mozambique

The ITUC Global Rights Index ranks Mozambique as a country with regular violations of labour rights (ITUC, 2023). This ranking has not changed since the EPA came into force.

Mozambique ratified several ILO conventions since the EPA started to be applied, such as the Protocol to the Forced Labour Convention (P029), the Safety and Health in Mines Convention (No. 176), and the Maritime Labour Convention (MLC, 2006). However, no evidence has been found yet that would link these developments to the EPA or trade with the EU.

Namibia

Namibia has a legal framework that includes a range of labour rights and protections – the law provides for the right to form and join trade unions, for the right to bargain collectively, to hold strikes. In some sectors (e.g. police), joining unions is not permitted by law. Namibia struggles with high levels of youth unemployment (especially in rural areas), and labour rights in the informal sector are often less protected (World Bank, 2021a; United Nations, 2021a). The 2023 ITUC Global Rights Index ranks Namibia as a country with regular violations of rights of workers, and its rating has deteriorated in 2022 (ITUC, 2023).

Despite some employment changes triggered by the EPA, it is not likely that this has led to a significant impact on labour rights in Namibia.

Namibia ratified several ILO conventions since the EPA started to be applied, such as the Protocol to the Forced Labour Convention (P029), the Labour Inspection Convention (No. 81), the Employment Policy Convention (No. 122), the Work in Fishing Convention (No. 188), the Domestic Workers Convention (No. 189), and the Violence and Harassment Convention (No. 190). However, now evidence could be found to date that would show a contribution of the EPA to these developments.

South Africa

South Africa has a legal framework that includes a range of labour rights and protections, and the country has made significant strides in addressing labour issues and promoting workers' rights since the end of apartheid. South Africa's labour landscape is characterised by a mix of achievements and ongoing challenges. The Government, labour unions, employers, and civil society organisations engage in efforts to address these issues and promote decent work for all. South Africa struggles with high levels of unemployment, especially youth unemployment, and labour rights in the informal sector are often less protected (United Nations, 2022; 2022a). The 2023 ITUC Global Rights Index ranks South Africa as a country with repeated violations of rights of workers; this ranking has not changed since 2017 when the EPA started to be applied (ITUC, 2023). Despite some employment changes triggered by the EPA, it is not likely that this has led to a significant impact on labour rights in South Africa.

South Africa ratified several ILO conventions since the EPA's start of application, such as the Violence and Harassment Convention (No. 190) and amendments to the Maritime Labour Convention (MLC, 2006). However, no evidence could be found that these developments were influenced by the EPA or its implementation.

8.5 Prohibition of Slavery and Forced Labour, including Child Labour

Botswana

Child labour in Botswana is reported to be common in farming including rearing livestock, mending fences and moulding bricks, street work, domestic work and as a result of commercial sexual exploitation, sometimes as a result of human trafficking (US Department of Labor, 2022). Children of the indigenous Basarwa/San peoples were reported to be engaged in child labour on large cattle farms in Gantsi (US Department of Labor, 2022; United Nations, 2023a). Forced labour has been recorded in cattle herding (US Department of Labor, 2022; United Nations, 2023).

Botswana has ratified all key international conventions concerning child labour (the ILO Conventions No. 138 & 182, the CRC and two of its Optional Protocols, and the Palermo Protocol on Trafficking in Persons). The Government has introduced related laws and regulations. However, a significant gap in Botswana's legal framework pertains to the absence of a compulsory education age that aligns with the minimum age for employment. While light work activities are allowed for children at the age of 14, the conditions or types of light work activities permitted for children are not defined. A list of hazardous work activities for children is also not defined. Enforcement of child labour-related laws is sometimes hindered by insufficient human and financial resources of enforcement agencies. In a situation of increased demand in the sectors with forced or child labour, employers might resort to using more forced and child labour to meet that demand, especially if it is cheaper, and labour protection is not sufficiently enforced.

Trade under the EPA has led to a minor increase in production (by 0.8%) in one of the sectors where child labour can be found in Botswana – the cattle sector. However, no

evidence of a causal link between increased production under the EPA and child labour has been identified.

Eswatini

Forced labour and child labour in Eswatini are reported to be common in raising and herding livestock (including cattle, buffalo, goats, swine, horses, and sheep), domestic work, and street work (US Department of Labor, 2022a). Eswatini has ratified all key international conventions concerning child labour (the ILO Conventions No. 138 & 182, the CRC and two of its Optional Protocols, and the Palermo Protocol on Trafficking in Persons). The Government has also introduced related laws and regulations. However, a key gap in Eswatini's legal framework refers to the lack of a compulsory education age that would be consistent with the minimum age of work. Enforcement of the legal framework on child labour is hindered by insufficient human and financial resources (US Department of Labor, 2022a).

Based on the results of the economic modelling undertaken, the EPA has not affected sectors in which forced labour and child labour have been identified: the production increase in the cattle sector amounted to 0.01%. No other causal links have been identified between child labour incidence and the EPA in Eswatini.

Lesotho

Child labour in Lesotho is reported to be common in the cattle sector (herding animals), farming (including planting, applying pesticides, and harvesting), domestic work, street work, and as a result of commercial sexual exploitation (UNICEF, 2021; US Department of Labor, 2022b). Lesotho has ratified all key international conventions concerning child labour (the ILO Conventions No. 138 & 182, the CRC and two of its Optional Protocols, and the Palermo Protocol on Trafficking in Persons). The Government has introduced related laws and regulations. However, a key gap in the legal framework of Lesotho refers to the low compulsory education age, which makes children aged 14 and more vulnerable to child labour because they are not required to go to school by law. Enforcement of the legal framework on child labour is hindered by insufficient human and financial resources (US Department of Labor, 2022b).

Based on the results of the economic modelling, the EPA did not have a significant impact on the sectors where child labour had been found. No other causal links have been identified between child labour incidence and trade under the EPA in Lesotho.

Mozambique

Child labour in Mozambique is reported to be a serious issue in the tobacco sector and in artisanal mining (US Department of Labor, 2022c). Mozambique has ratified all key international conventions concerning child labour (the ILO Conventions No. 138 & 182, the CRC and two of its Optional Protocols, and the Palermo Protocol on Trafficking in Persons). The Government has introduced the related laws and regulations. However, the legal framework of Mozambique does not include minimum age protection for children without formal employment relationships (US Department of Labor, 2022c).

Based on the economic modelling results, the impact of the EPA on labour in the beverages and tobacco sector amounted to 0.5%, in a sector providing employment for 130,000-150,000 people (tobacco only). No evidence has been identified to date to link these jobs to child labour; further research will be carried out. Child labour incidences seem to be common across the whole sector, including companies exporting internationally. Some reports point that child labour (especially children of migrant workers) in the tobacco sector has been found also in supply chain of multinational tobacco companies (PMI, 2021) (see

also social analysis). However, no specific evidence related to the use of child labour in economic activities under the EPA have been identified.

Namibia

Child labour in Namibia has been reported in the farming sector, fishing, domestic work, street work, and in commercial sexual exploitation, sometimes as a result of human trafficking (US Department of Labor, 2022d). Namibia has ratified all key international conventions concerning child labour. The Government has also introduced related laws and regulations. However, one of the gaps in its legislation constitutes the lack of provisions that determine the number of hours that children between 14 and 18 are permitted to work (US Department of Labor, 2022d).

Based on the economic modelling results, the EPA has had a significant impact on the production and employment in agricultural sectors. Production and employment in the fishing sector has also increased. Production has increased by 5.6% and employment has increased by 5.1% for skilled workers and by 5.7% for unskilled workers. In a situation of increased demand in sectors such as fishing and farming, employers might have resorted to using more forced and child labour to meet that demand, especially if it is cheaper, and labour protections are not sufficiently enforced. However, no other causal links have been identified between child labour incidence and trade under the EPA in Namibia.

South Africa

Child labour in South Africa is reported to be common in the farming sector (specifically in the production of maize and fruit), domestic work, and street work (US Department of Labor, 2022e). South Africa has ratified all key international conventions concerning child labour. The Government has introduced related laws and regulations and taken various measure to combat child labour. However, reports state that social programmes are not sufficient to address the scope of child labour (US Department of Labor, 2022e).

Based on the economic modelling results, trade under the EPA has had a minor impact on the production in such sectors as other grains (including maize) and vegetables, fruit and nuts, which increased by 1% and 2.4% respectively. No causal links have been identified between child labour incidence and trade under the EPA in South Africa. Moreover, stakeholders noted that strict mechanisms regarding the use of child labour are in place, and no evidence has been found that the EPA has contributed to the use of child labour.

8.6 Right to Participate in Public Affairs

Stakeholders consulted by the evaluation team so far noted that awareness about the EPA is low among non-state actors in the SADC EPA States. This suggests that the potential to increase civil society participation and involvement in decision making regarding TSD under the EPA has not been used so far.

In this context, the evaluation team notes that compared to other EU trade agreements, the TSD Chapter in the EU-SADC EPA does not include provisions that require the establishment of civil society Domestic Advisory Groups (DAGs), or any regular meetings involving civil society. Article 10(3) of the EPA merely refers to the possible involvement of "relevant stakeholders" in dialogue and cooperation on the TSD Chapter through the TDC. The actual involvement of civil society in the implementation of the EPA has also been limited (see sections 4.1 and 4.11). This points to a causal link from the absence of binding provisions in the EPA on civil society participation to a low level of awareness and an absence of a notable role of civil society in SADC EPA States in the implementation and monitoring of the Agreement, and the chance to foster the right to participate in public affairs has so far been underused with respect to participation in the Partner Countries' trade policies vis-à-vis the EU.

In addition, the conditions for participation in public affairs differ across the SADC EPA States:

- **Botswana** "has long had a reputation of stable and well-established democracy" (EEAS, 2023). Non-governmental organisations (NGOs) in Botswana, including human rights organisations, generally operate without any restrictions (Freedom House, 2023). However, Botswana lacks laws regarding the access to information (Southern Africa Litigation Centre, 2023; Freedom House, 2023), which limits government transparency.
- **Eswatini** lacks laws regarding the access to information, and "there is no culture of proactive disclosure of government information" (Freedom House, 2022). Transparency has been reduced even more since the adoption of the Public Service Act in 2018. Section 8 of the Act bans public officials from providing public information to the media without express permission by the Secretary of the Cabinet (MISA, 2018).
- **Lesotho** lacks laws regarding the access to information (United Nations, 2019). Only selected public documents are publicly available. Government procurement decisions and tenders cannot be accessed online (Freedom House, 2022a).
- A freedom of information law of **Mozambique** was adopted in 2014 (Law No. 34/2014) to protect and promote public participation, transparency, and proactive disclosure of information by both public and private institutions. However, reports state that in practice it is not easy to obtain government information, especially in Cabo Delgado Province (Freedom House, 2022a).
- **Namibia** adopted the Access to Information Law (ATI) in 2022. However, in practice, there are difficulties in accessing some public information (Freedom House, 2023a). Domestic and international human rights organisations generally operate without restrictions from the Government (US Department of State, 2022d).
- The **South Africa**n Constitution guarantees the right to access to information (Section 32(1)) and requires that private institutions release information necessary for the exercise and protection of rights. The 2000 Promotion of Access to Information Act (PAIA) has introduced a framework for access to information procedures in both public and private entities to promote transparency and openness. However, in practice, the procedure of accessing information is laborious and bureaucratic (Freedom House, 2023b).

8.7 Women's rights

In the absence of any particular provisions in the EPA on women and trade, an impact of the EPA on women could have materialised through an increase or decrease in employment in sectors that engage a high share of female workers which can affect their jobs and income, as well as access to social protection. In some cases, factories facing increased competitive pressure may also reduce wages as a cost-cutting measure and exacerbate existing gender wage gaps and make it more difficult for women to support themselves and their families.

Botswana

According to the World Economic Forum's Global Gender Gap Index, Botswana has closed its gender gap on educational attainment, and the country has high scores for the economic participation of women and their access to healthcare. On the other hand, the political empowerment score has remained very low since 2017, as women continue to be underrepresented in the government and in decision-making positions (WEF, 2023). Gender-based violence and domestic violence remain a matter of concern (United Nations, 2023; 2023a), and there is no legal requirement for women to receive equal pay for equal work (US Department of State, 2022).

The economic modelling results indeed indicate a shift of employment away from the country's largest manufacturing employer of women (more than 80% of jobs in the sector

are held by women): the combined textile and apparel sector in Botswana. The EPA's labour effects in these sectors point to a decrease of 1.8% in the textile sector and 2.4% in the apparel sector, suggesting a minor but direct impact on women employed in this sector, affecting their incomes from these jobs and their livelihood. Also, many of the jobs are for low-skilled persons, oriented at youth and women, providing a livelihood for these vulnerable population groups (Euromonitor, 2023).

Eswatini

The 2022 World Economic Forum Global Gender Gap Index reports that Eswatini almost closed its gender gap on educational attainment, and that the country has high scores related to economic participation of women and their access to healthcare. The political empowerment score has however remained very low since 2017, as women continue to be underrepresented in the Government and in decision-making positions (WEF, 2023). Gender-based violence and domestic violence remain matters of concern, and women face discrimination at work and have challenges to retain and exercise their rights to land (US Department of State, 2022a).

An important employer of women in the country is the textile and garments sector. Textile and garment factories are located mainly in the Matsapha Industrial Estate, which is the main business hub in Eswatini. Some factories are also present in Nhlangano and Siphofaneni. The textile industry had been under pressure for years before the application of the EPA, linked primarily to the expiry of the Agreement on Clothing and Textiles in 2004. In 2005, the total number of jobs recorded in the sector dropped to approximately 11,500, compared to 30,000 in 2004 (Madonsela, 2006). Since then, the sector recovered somewhat: in 2020, 20 textile companies in Eswatini employed about 22,000 people, more than 80% of them being women (United Nations, 2020). Nevertheless, jobs in this sector are generally of poor quality (IndustriAll, 2018).

The economic modelling results indicate a negative effect on labour in the textile (-1.8% for unskilled workers and -1.7% for skilled workers) and apparel sectors (-6.2% for skilled workers and -6.1% for skilled workers), despite the limited importance of direct exports to the EU from the sector: about 98% of all textile exports from Eswatini go to South Africa, and only very small share of textile products reaches such EU states as Austria, Germany, Italy, France, Portugal and the Netherlands (World Bank, 2021). Some sources say that textile exports to the EU are "almost non-existent" (Times of Swaziland, 2023). Because the textile and garments sectors employ a high share of female workers, this loss in employment is likely to affect women more than men.

Lesotho

The 2022 World Economic Forum Global Gender Gap Index indicates that Lesotho closed its gender gap on educational attainment and almost closed its gender gap on health and survival indicators. The political empowerment score has remained very low since 2017, as women continue to be underrepresented in government and in decision-making positions, although members of Parliament and local councils are now elected with "special seats" reserved for women. When it comes to wages for similar work, Lesotho is one of the lowest-ranking countries in this dimension (WEF, 2023). Although legislation was approved in 2022 to counter domestic violence, GBV and domestic violence continue to rise, and women "continued to be excluded from participation in the economy and politics, and suffered the triple burden of poverty, unemployment and inequality" (Amnesty International, 2023). Violations of their rights have been reported across economic sectors but also in specific sectors. According to trade unions, women working in the textile sector were only provided six weeks of paid maternity leave instead of the 12 weeks stipulated by law (US Department of State, 2022b).

In 2017, the combined textile, apparel, and footwear manufacturing industry in Lesotho employed around 46,500 workers (Tralac, 2017). Most of its textile exports go to Belgium, South Africa and the United States (IMF, 2022). The textile and apparel sector is the most important source of employment and a key employer of women, who account for 80% of all textile workers in Lesotho (CBS, 2019; Mari-Nelly & Baskaran, 2021).

The economic modelling results point to an increase in employment in the textiles sector (1.7% for both skilled and unskilled workers) and loss of jobs in the wearing and apparel sector (-1.3%). Both sectors employ a high share of female workers. More detailed data disaggregated by sector could not be identified at this stage. Based on the analysis undertaken to date, we preliminarily find that the EPA has had a mixed impact on women. Because the textiles and apparel sectors are related industries that are involved in the production of clothing and textiles, women are likely to move jobs rather than lose them. However, depending on the production processes and tasks involved, there may also be distinct differences in the skills required for these two sectors. For example, skills in the textile sector include knowledge about the properties of different fabrics, knowledge of chemicals and dyes, their properties, application methods, and safety precautions. Skills in the wearing and apparel sector include skills in sewing, design and fashion.

Mozambique

The economic modelling results do not indicate any significant changes in economic sectors with a large share of female workers. As such, it is not likely that the EU-SADC EPA has significantly affected gender equality in Mozambique, either positively or negatively.

Namibia

The World Economic Forum Global Gender Gap Index Report states that Namibia has closed 80% of its gender gap and included the country in the list of top ten countries in the world regarding women's rights. Ranked 8th, Namibia has achieved full parity on both the health and survival and educational attainment indicators (subindexes), although the absolute levels of attainment are low for both women and men. On economic participation and opportunity, it is at 78% parity and holds the 19th rank globally. The score for the political empowerment indicator is the lowest of the four (WEF, 2023). Gender-based violence and domestic violence remain a matter of concern (United Nations, 2021a).

Agriculture is one the most important sectors in Namibia, as around 70% of the population (directly or indirectly) have their income and livelihood from working in agriculture (FAO, no date). The sector generates low-skilled jobs, oriented at youth and women, and provides livelihood for these vulnerable population groups (Kalimbo, 2023). Women are involved in crop cultivation, livestock farming, and subsistence farming. However, the sector is divided into two subsectors: commercial agriculture (capital intensive and fairly well developed) and subsistence agriculture (labour intensive and with limited resources and technology). Subsistence agriculture employs about 60% of the population and has limited access to markets. Commercial agriculture employs only 10% of the population and is export oriented (FAO, no date). An increase in employment due to the EPA is likely to have occurred in the commercial farming sector, leading to a direct but minor impact on women working in there, affecting their incomes and economic independence, and possibly improved access to resources such as healthcare and nutrition for themselves and their families, ultimately improving their overall wellbeing. The extent to which women workers in small-scale (subsistence) farming have benefited from the EPA will be addressed in a case study.

South Africa

The World Economic Forum Global Gender Gap Index indicates that South Africa almost closed its gender gap on educational attainment and health and survival indicators. Scores

for the political empowerment and economic participation indicators are lower, but overall South Africa is ranked 20th out of 146 countries in the world, which is higher than the ranking of France or the Netherlands (WEF, 2023). Gender-based violence (GBV) and domestic violence persist, as South Africa has one of the highest rates of GBV in the world, while levels of prosecution and conviction remain low (Human Rights Watch, 2022).

Textiles are South Africa's third largest employer in the manufacturing sector (Embassy of South Africa in the Netherlands, 2023). The sector is an important employer of women; more than 26% of all female manufacturing workers work in the sector (Jenkin & Hattingh, 2022). The sector generates low-skilled jobs, oriented at youth and women, and provides livelihood for these vulnerable population groups.

A small decrease in employment in these sectors resulting from the EPA, as calculated in the economic modelling, suggests a minor but direct impact on women employed in this sector, affecting their incomes from these jobs and their livelihood.

8.8 Indigenous Peoples' Rights

A potential impact of the EPA on indigenous peoples' rights could so far only be determined for Botswana.

While exact data on the number of indigenous peoples (Basarwa) living in Botswana are not available, some estimates point to a population of approximately 50,000 people. Most Basarwa are reported to work on farms, as small cattle farmers or labourers on small farms cultivating crops and raising livestock. They also sell handicrafts, meat or foraged products, such as thatching grass or firewood (Minority Rights, 2023).

Data limitations do not allow to see how many Basarwa people are employed in agricultural sectors (and in what sectors exactly). Regarding the cattle sector, the economic modelling results show a minor increase in production and employment in this sector (by 0.8% each). It may be possible that they have been positively affected by the EPA due to the job creation in this sector.

Regarding the impact of the EPA on the rights to property of the Basarwa, including land tenure and risk of "land grabbing", no causal link to the EPA has been identified so far. Historically, the Basarwa have faced challenges related to their land rights. Reports, including recent ones, state that the Basarwa communities face land grabbing as a result of wildlife conservation and tourism initiatives, exploration and extraction of minerals (when mining activities encroached on the land traditionally used by them), expansion of the agricultural sector, urban development, and construction of roads and dams (IWGIA, 2004; Molebatsi, 2019; Mbaiwa, 2023).

Based on the economic modelling results, it is not likely that the EPA has had a significant impact on the land rights of indigenous peoples. The EPA's impact on production in the mining and minerals sectors as well as construction has been marginal. Production in agricultural sectors expanded modestly (below 0.5%), except the "other crops" sector which has increased by 1% as a result of the EPA. Moreover, an increase in production in these sectors does not necessarily mean an impact on the land use and violation of land rights. So far, the environmental analysis has not found an increase in land use in Botswana (see chapter 7 of the main report). No further evidence of an impact of the EPA on the land rights of indigenous peoples has been identified.

8.9 Land Rights (Right to Own Property)

Potential effects of the EPA on land rights, respectively the right to own property, have been identified for Mozambique and South Africa only.

Mozambique

Some reports point to the presence of "land grabbing" in Mozambique. Specifically, these practices are reported to be a matter of concern in the extractive sector, i.e. in such sectors as mining, oil, gas, coal (FOEI, 2020; 2022). However, incidents of land grabbing have also been reported in the paper and pulp industry that involved an EU-based paper producer (Environmental Paper Network, 2021).

According to the economic modelling results, production in the paper and paper products sector in Mozambique has declined by 2.2%, suggesting no impact on land grabbing from the activities in this sector triggered by the EPA. For the extractive sectors, while descriptive statistics of trade relations between the EU and Mozambique indicate an increase in bilateral trade in related economic sectors, the economic modelling results suggest no significant impact of the Agreement in these sectors. As a result of the EPA, the increase in production in the oil, coal and gas sectors amounted to 0.3%, 0.4% and 0.5% respectively, suggesting a possible minor impact. A 2020 report published by the Friends of the Earth International (FOEI) finds that gas projects in the Cabo Delgado province have contributed to more militarisation of the region, as the Government opted to protect gas infrastructure by mobilising more armed forces. The report states that:

> "Nothing is being done to act on the root political and social causes of the conflict. On the contrary, the militarisation of the zone and the gas operations help feed the underlying tensions perpetuating the violence. Human rights violations are on the right, as the communities find themselves caught between the insurgents, the army, private security contractors and the gas companies and their subcontractors. Communities are being robbed of their lands, their access to sea and their livelihoods" (FOEI, 2020).

The report links operations in the region to the French company Total. In 2021, TotalEnergies declared force majeure and withdrew all Mozambique Liquefied Natural Gas (LNG) Project personnel from the Afungi site due to security concerns in the north of Cabo Delgado province (TotalEnergies, 2021).

South Africa

Land rights in South Africa have been a complex and contentious issue historically and continue to be a subject of debate and concern. Since the end of apartheid, South Africa has undertaken various measures and reforms to address land ownership and land rights disparities that were a legacy of the apartheid times (Kloppers & Pienaar, 2014).

South Africa has implemented land reform policies aimed at addressing historical injustices related to land ownership (Kloppers & Pienaar, 2014). However, despite these efforts, there have been challenges in the implementation of land reform programmes, and delays, disputes, and issues related to compensation and land use planning have been common. Some South Africans, particularly in rural areas, still lack secure land tenure, which leads to vulnerability, as these people may not have legal protection against eviction or access to productive land for farming. For instance, violations of the right to free, prior, and informed consent of indigenous peoples have been reported regarding land development (United Nations, 2022a), including large scale land acquisitions that often compromise customary subsistence practices (Neudert & Voget-Kleschin, 2021).

The economic modelling results and environmental analysis suggest a slightly increased land use as a result of production increases in the agricultural sectors. Based on this, the overall impact on land rights from the EPA is estimated to have been limited. Further analysis will be carried out by the evaluation team and be reported on in the draft final report.

8.10 Summary

The review of the pre-existing vulnerabilities regarding human rights, as well as the results of the economic modelling indicate that the EU-SADC EPA overall has not had a significant impact on human rights, either in the EU or the SADC EPA States. Sectoral and/or local impacts on specific human rights have been identified from production and employment shifts caused by the EPA according to the CGE modelling results. The most prominent impacts have been noted in Namibia and South Africa.

Changes in employment and production patterns have led to a mixed impact on the right to an adequate standard of living across all SADC EPA States. Increased employment opportunities generally lead to improved income and consequently better access to basic necessities. Labour contraction in a sector, on the contrary, erodes income, making it more challenging to achieve an adequate standard of living. The analysis carried out so far observes a crucial role of effective social policies and safety nets in mitigating adverse impacts on vulnerable population groups. Adverse impacts are more likely to materialise in practice in countries with insufficient implementation of legislative and policy frameworks than in countries that have effective enforcement mechanisms in place (e.g. with respect to child labour in South Africa).

No significant impact has been identified regarding the right to food, as those SADC EPA States that were vulnerable to food security continued to rely on food programmes from international donors. A minor positive impact on food security has been observed for Namibia, where production increased across most agricultural sectors.

A mixed but fairly limited impact of the EU-SADC EPA could be observed for the right to water, linked to production in water intensive and water-polluting economic sectors. When it comes to women's rights, the impact has also been somewhat limited, displaying a mixture of outcomes across different SADC states and various sectors.

Due to the limited provisions regarding civil society participation in the EPA's TSD chapter, an active engagement of civil society on EPA matters has not been consistently promoted across all SADC EPA States. The involvement of civil society in trade-related matters remains limited, often due to a lack of enabling mechanisms, legal frameworks, or political will. As a result, the level of transparency, inclusivity, and accountability in the EPA's implementation regarding labour rights has been limited, underscoring the need for consistent and robust efforts to encourage civil society engagement throughout the region.

The EU has provided support in several areas through development cooperation and as a donor to the UN WFP, for example through specific projects carried out in Mozambique and Lesotho.

The analysis regarding land rights will be extended in the remainder of the evaluation based on stakeholder consultations.

9 RESULTS OF EPA-RELATED DEVELOPMENT COOPERATION

In the EPA, the Parties agreed that development cooperation is a crucial element of their Partnership and an essential factor for the achievement of the objectives of the Agreement. Development cooperation was to be provided by the EU and its Member States, and the establishment of a regional development financing mechanism such as an EPA fund was to be considered.

The evaluation at present only has very preliminary findings to report on the results of EPA-related development co-operation, based on anecdotal information provided about different projects and programmes funded by the EU and EU Member States. A comprehensive overview with key data of all EPA-related interventions could not be obtained by the evaluation team to date. Accordingly, more work on this aspect of the evaluation will be required during the remainder of the evaluation.

Based on the information available, the EU and its Member States have indeed provided assistance and technical support to the SADC EPA States, in various areas, and at both regional and national levels.

At the regional level, the EU has provided support to SADC EPA States since before the EPA was concluded. Thus, the **Regional Economic Integration Support** (REIS) programme, a €20 million programme implemented from 2013 to 2018, assisted Partner States in the negotiation and implementation of the EPA at the regional level (as one of the programme's four result areas). The final evaluation of the REIS programme (Calcopietro/Ihiga, 2016) concluded that it was relevant for supporting the successful conclusion of the EPA negotiations and largely effective – although noting the withdrawal from Angola and the failure to conclude the negotiations on services liberalisation in the EPA. Among other challenges regarding the effectiveness of REIS, the evaluators noted that "the process of undertaking capacity building initiatives through sensitisation and awareness initiatives for stakeholders at the national and regional level has not started, aimed at facilitating effective understanding of the implications of the EU-SADC EPA rules of origin, including possibilities for utilising the EPA cumulation provisions by potential exporters targeting EU markets" (Calcopietro/Ihiga, 2016: 29) and highlighted the importance of strengthening institutions for the activation of the EPA's cumulation provisions. These observations are still relevant today, as findings in other parts of this report have shown.

The REIS programme was complemented by the **SADC Trade Related Facility** (TRF), which ran from 2015 to 2021 (€32 million) and provided support in different areas more at the national level, including upgrading quality infrastructures in SADC countries, as well as the SADC Project Preparation Development Facility (PPDF), which aimed at supporting the SADC countries in developing investment projects.

The TRF was evaluated fairly critically. According to a comprehensive evaluation of EU-SADC cooperation over the period 2013 to 2019 (Ramboll/NIRAS, 2020),[108] the TRF was highly relevant to the SADC regional economic integration agenda and addressing domestic issues related to the SADC Trade Protocol and the EPA. However,

> "its design was rushed, with limited consultation and ownership by local stakeholders; Member States (MS) requested to come up with national projects without an explicit regional focus; projects lacked of business plans defined at MS level, with clear sustainability plans. The effectiveness of the facility was also affected by the low ownership of MS, as evidenced by the fact that Project Management Units (PMU) only in

[108] The main body of the evaluation report was provided to the evaluation team. Page numbers in the final version of the report may differ from those referred to here.

> few cases were integrated into national Ministries, inadequate national commitment and resources affecting the level of domestication. The TRF also evidenced the inadequateness of the synergies with EU Delegations and the EU bilateral cooperation in MS. TRF implemented several useful activities at MS level, but with limited contribution to Regional Integration (as by and large activities had mainly a national focus)" (Ramboll/NIRAS, 2020: 29f).

More recently, a number of regional EU programmes have been implemented. The **SADC Trade Facilitation Programme** (TTFP, €15 million, 2019-2024) is being implemented to address barriers to trade and facilitate the harmonisation and recognition of trade tools with the aim of increasing intra-regional and international trade and reaping the benefits of the EU-SADC EPA. One of the Programme's results areas is specifically dedicated to the implementation of the regional aspects of the EPA, with specific activities being undertaken with regard to:

- Monitoring and evaluating the EPA's impact on SADC stakeholders (manufacturers, exporters, importers, farmers, vulnerable groups like women and youth, etc.) using the Monitoring and Evaluation Mechanism developed under the GIZ CESARE programme;
- Implementation of the visibility and communication Strategy of the EU-SADC EPA;
- Capacity-building, training and mentoring at regional level for the SADC EPA States and non-state actors in relevant provisions of the EPA (rules of origin, safeguards, SPS and TBT matters, agriculture partnership, etc.);
- Establishment of EU-SADC EPA implementation structures at regional and national levels; and
- Enhanced dialogue of public and private sectors, and non-state actors on EPA opportunities and other aspects of the EPA.

A mid-term evaluation of the Trade Facilitation Programme was carried out in 2022, but the corresponding evaluation report remains to be made available to the evaluation team.

Other EU support programmes are also relevant for the EPA but only appear to have an indirect link and very limited EPA-related actions. These include:

- Support towards Industrialisation and the Productive Sectors (SIPS) in the SADC Region (€18 million), which includes as the only immediately EPA-linked activity a review of the EPA's rules of origin to assess to what extent these are benefiting regional value chains.
- Support to Improving the Investment and Business Environment (SIBE) in the SADC Region (€14 million), which has no specific EPA-related activities.
- The SADC Dialogue Facility (€3 million), which also has no specific EPA-related activities.
- Support towards the Operationalisation of the SADC Regional Agricultural Policy Project (€9 million). Although this could in principle be a very relevant project in relation to the EPA, the Action Document for the Programme does not refer to the EPA at all.

Evaluations of these projects have not been obtained by the evaluation team to date. However, the comprehensive evaluation of EU-SADC cooperation over the period 2013 to 2019 concluded that this cooperation had "been effectively contributing to results of regional integration." Based mainly on an assessment of REIS, TRF, PPDF and the cross-regional Transport and Transit Facilitation Programme, that evaluation concluded that the programmes "delivered an impressive number of activities, products and services, supporting a notable amount of results across different areas of regional integration, particularly related to trade, transport, transit, finance and EPA" (Ramboll/NIRAS, 2020: 25). At the same time, it notes a number of challenges:

> "Areas where results were below expectations include: overall trade facilitation and trade related outcomes, EPAs (viewed as too slow), policy dialogue and harmonisation, citizens awareness, capacities at all levels, private sector involvement and support, civil society

> involvement and support, governance mechanisms, mobilisation of FDI. In general results at level of Member State have been appraised by external evaluations as low" (Ramboll/NIRAS, 2020: 25).

In the remainder of the evaluation, a review of the more recent regional programmes, as well as the relevant EU Member States' programmes – such as the GIZ's CESARE programme – remains to be done.

At the national level, the EU also has been providing technical assistance to SADC EPA States, such as the *Promove Comércio* Programme in Mozambique, and programmes aimed at supporting various SADC EPA States in the implementation of their national EPA implementation plans. A closer review of these projects remains to be done.

Despite the support provided, stakeholders in SADC EPA States interviewed so far by the evaluation team have noted that more extensive, more targeted (in terms of focussing on SADC EPA States rather than SADC overall) and stronger technical support was required in various areas, including productive capacity, customs, or SPS issues (this is already being addressed through the support programmes for the national EPA implementation plans).

A dedicated regional financing mechanism, as envisaged in the EPA text, has not so far been established.

PART C: UPDATE ON THE EVALUATION PLAN

10 REMAINDER OF EVALUATION WORK

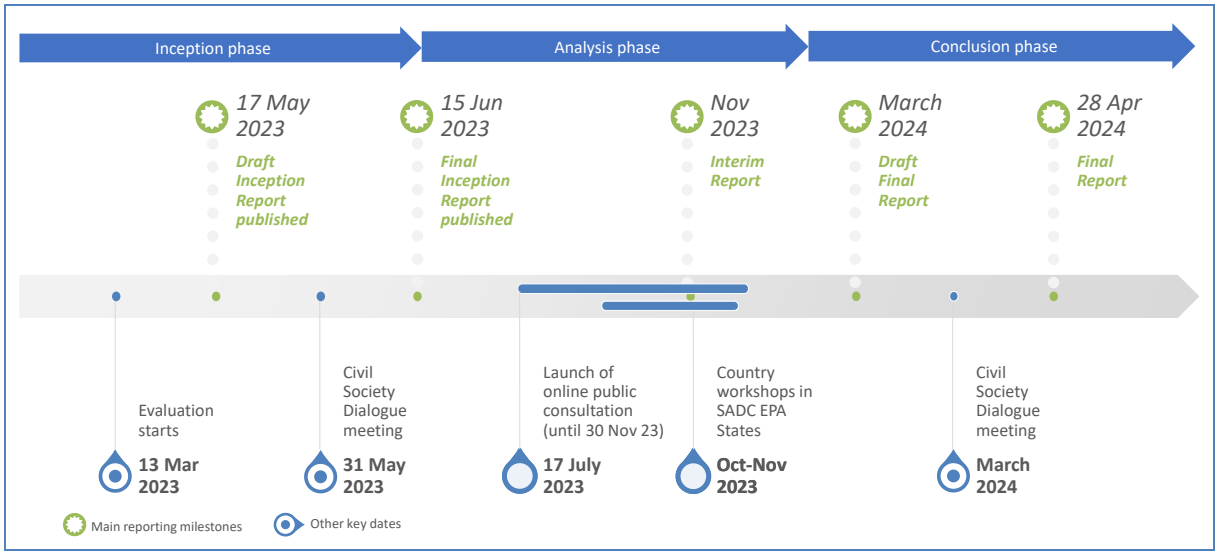
Work on the evaluation started in March 2023, with a planned duration of 14 months. The inception report was published in draft form in May 2023, and the final version in June 2023. Following this interim report, one major deliverable remains to be prepared, i.e. the final report, which is due in draft in February 2024, and the final version in April 2024. These dates are as originally planned.

The remaining work to be done consists of:

- The finalisation of the ongoing analyses of the EPA implementation as well as the EPA's economic and sustainable development impact (evaluation findings);
- The finalisation of ongoing consultations activities – notably the online public consultation that is open until 30 November 2023 and the workshops in partner countries being held in October and November 2023, as well as complementary interviews with stakeholders both in the EU and the SADC EPA States;
- The preparation of four case studies;
- Providing succinct responses to the evaluation questions and drawing conclusions and recommendations from the evaluation findings;
- Preparing the draft final and final reports, as well as presenting and discussing them with the Sterring Committee and stakeholders in a civil society dialogue (CSD) meeting to be held following the publication of the draft final report (planned for March 2024).

The updated evaluation schedule is presented in Figure 16, indicating the due dates for the main deliverables (reports) as well as other key milestones.

Figure 16: Evaluation schedule overview



The following sections provide more information about the case studies and the ongoing consultations.

10.1 Case Studies

Four sector- or issue-specific case studies will be prepared as part of the evaluation. The purpose of the case studies will be to illustrate some of the more general findings as well as to address issues which are not very suitable to be analysed at an economy-wide or sectoral level. The inception report had presented a list of potential case study topics,

which have been considered further based on the findings obtained to date. Table 27 summarises the results of the more detailed screening and the selection decisions taken.

Table 27: Case study topics considered and decisions for selection

Case study topic	Explanation of selection decision
1. Impact of the EPA on the automotive sector	**Selected**. See more details below the table.
2. Trade Defence measures on frozen poultry from the EU	**Selected** with broadened scope. See more details below the table.
3. Geographical indications	Not selected – addressed as part of the overall analysis. Data availability constraints prevent any more detailed analysis going beyond the overall analysis.
4. SPS measures and limited fill rates of agricultural TRQs	Not selected – addressed as part of the overall analysis. Although many SPS issues were raised, a nexus between these and the fill rates of TRQs could not be found. SPS issues and TRQ utilisation are addressed separately as part of the overall analysis. Note that citrus fruit and poultry were considered as potential case studies with SPS relevance, but ultimately the EPA's impact on the sugar sector is more evident, and the issues addressed in that case study more comprehensive.
5. EPA and export diversification in the agricultural sector: trade in indigenous products/cannabis/medicinal plants	Not selected – no notable and systematic effect of the EPA on export diversification could be established. Anecdotal evidence is presented as part of the overall analysis.
6. Export diversification and new opportunities created by the Agreement	Partly addressed as part of the case study on renewable energy and the effect (if any) on trade in climate change-mitigating goods.
7. Contribution of the EPA to regional value chain creation (value chain to be identified)	Addressed as part of the case study on the automotive sector (see number 1 above). Because of the late activation of diagonal cumulation, there is not much to report on an EPA contribution to regional value chain contribution during the evaluation period.
8. Effect of the EPA on investment in a specific sector, e.g. renewable energy	**Selected in the form of a case study focusing on renewable energy**, and covering both trade and investment effects. See more details below the table. Generally difficult to establish a causal link between the EPA and investment due to the Agreement's focus on goods trade.
9. Impact on MSMEs and the informal sector	Addressed as part of the case studies on sugar and poultry. Detailed analysis of other effects on the informal sector difficult due to lack of data not only about MSMEs and informal businesses in general but also about their involvement in international trade.
10. The cost of non-implementation: effects of the non-activation of diagonal cumulation	Addressed as part of the case study on the automotive sector (see number 1 above).
11. Spatial effects of the Agreement in terms of regions benefitting and being negatively affected by the Agreement (both in partner countries and the EU)	Not selected – lack of data on geographical distribution of EPA effects (and limited scale of EPA effects).
12. Impact of TSD chapter on a specific sector/topic in Partner countries	Not selected – the findings to date show that the generality of the TSD chapter do not allow to identify any specific impact of the chapter on any sector.
13. Biodiversity	Addressed in part in the case studies on the sugar and poultry sectors; a further separate case study dedicated to biodiversity issues not selected due to limited environmental effects of the EPA
14. Climate change	Addressed as part of the case study on renewable energy (see number 8 above).
15. TSD chapter implementation	Not selected – addressed as part of the overall analysis of EPA implementation and effects. The limited degree of specificity of the TSD chapter makes it difficult to do any more detailed analysis.
16. Role played by civil society in the implementation and monitoring of the EPA through the mechanisms established under the Agreement	Not selected – addressed as part of the overall analysis of EPA implementation.
17. Possible impact of the EPA on the right to food	Addressed as part of the case study on the sugar sector (see number 19 below).

Case study topic	Explanation of selection decision
18. Possible impact of the EPA on land rights	Addressed as part of the case study on the sugar sector (see number 19 below).
19. Impact of the EPA on the sugar sector	**Selected.** Not listed in the inception report, but provides the opportunity to address various issues that were listed as potential case studies.

The following case studies have been selected, applying the selection criteria described in the inception report:

- **Impact of the EPA on automotive sectors in the EU and the SADC EPA States**. Apart from the sector being economically important both in the EU and South Africa, the CGE results show that it is one of the most affected sectors, both ways. The study will thus allow to analyse how the EPA contributed to increasing trade in both directions and to what extent this strengthened value chains between the parties, but also regional value chains; for example, we note that Lesotho produces textile and leather covers for car seats (and some other components) and exports them to South Africa. It will also look into some potential missed opportunities in the sector during the evaluation period, including the late activation of diagonal cumulation (facilitating the use of inputs from other countries in South Africa's preferential exports of automotive products to the EU), and the exclusion of electric vehicles from the liberalisation in SACU countries. The main focus of the case study will be on economic effects, although environmental (notably in relation to the non-coverage of electric vehicles), social (employment, reduction of poverty and informality) and human rights effects will also be addressed, as required.

- **Impact of the EPA on the sugar sectors in the EU and the SADC EPA States.** Next to trade in the automotive sector, sugar and sugar products are another sector in which trade and other economic variables, according to the CGE results, have been influenced relatively strongly across the Parties. In addition, sugar is an important sector in several of the Parties and interest in the sector is high, both among EU (including Outermost Regions) and selected SADC stakeholders. In addition, a case study of the sugar sector also allows addressing a number of potential non-economic effects of the EPA. For example, it will also address effect on various human rights issues. With regard to the right to food, it is noted that sugar production for domestic consumption is an important food security policy issue in some SADC EPA States, such as Mozambique. It also touches upon land rights, especially where large commercial farms are created for export purposes or, conversely, where land is distributed to smallholder sugar farmers; in Eswatini and South Africa, smallholder farmers represent more than 90% of all sugar cane growers.

- **The EPA and renewable energy – trade and investment effects.** The EPA has no specific provisions to facilitate trade in products important for climate change mitigation and adaptation, or foster investments in related sectors. Nevertheless, the preliminary research undertaken to date indicates that it may have contributed, e.g. through tariff preferences granted by the EU to SADC EPA States for hydrogen-based products, to some investment decisions in renewable energy projects in SADC EPA States. On the other hand, some provisions in the EPA, such as the exclusion of electric vehicles from SACU's tariff preferences for the EU may have been a missed opportunity to utilise the EPA as a tool in the Parties' transition to net-zero, and more specifically the need to decarbonise the energy sector in South Africa.

- **Impact of the EPA on the poultry sectors in the EU and the SADC EPA States.** The economic modelling analysis has shown that the EPA's tariff liberalisation had a clear impact on trade in poultry products; however, the economic modelling only captures the tariff liberalisation under the EPA and assumes that this liberalisation takes place and trade is not affected by other measures and developments. Analysing the effects of the EPA on the poultry sector in a case study allows shedding light on a range

of other such measures and issues affecting trade in poultry products, including trade defence instruments (bilateral safeguards and anti-dumping duties), SPS issues (outbreaks of avian influenza and market re-opening, country authorisation for export of animal products to the EU), or industrial policy considerations. The case study will also address social issues, notably effects on food prices and the dual market structure in some SADC countries, with a small number of large, vertically integrated firms and a multitude of smallholder farmers, and analyse to what extent the EPA has led to changing production patterns for smallholder farmers.

10.2 Consultations

Consultation activities are taking place as planned. Across the five pillars, the following activities have been implemented so far, respectively are planned for the remainder of the evaluation:

Pillar 1: Meetings with EU civil society (civil society dialogue, CSD, meetings)

The first of two planned meetings, to present and discuss the draft evaluation methodology, took place on 31 May 2023, in virtual form. More information about the meeting is available on the evaluation website or at https://policy.trade.ec.europa.eu/eu-trade-meetings-civil-society/civil-society-dialogue-meeting-evaluation-eu-sadc-economic-partnership-agreement-epa-draft-inception-2023-05-31_en

Remaining work: The second meeting, dedicated to the presentation and discussion of the draft final report is still tentatively scheduled for March 2024.

Pillar 2: Online public consultation

The online public consultation (OPC) was launched in July 2023 with an end date of 20 November 2023. Due to a rescheduling of one of the country workshops in SADC EPA States, the end date for the OPC was moved to 30 November 2023 to allow participants of the last workshop to also submit their responses.

Given a slow response rate over the summer, the workshops are being used as an opportunity to promote the OPC among stakeholders in the Partner countries; also, another newsletter will be circulated to stakeholders, to remind them of the OPC. Once completed, the responses will be evaluated and incorporated into the draft final evaluation report, with a separate report on the OPC results also to be prepared as an annex to the final report.

Pillar 3: Targeted consultation tools, in particular workshops in partner countries and interviews and meetings with stakeholders in the EU and partner countries

So far, the main focus of interviews has been on stakeholders in the SADC EPA Partner States, where most meetings have been held physically during field missions to all six countries (Botswana, Namibia and South Africa in June 2023, Eswatini in August 2023, Lesotho in September 2023, and Mozambique in September and October 2023). These have been complemented with virtual meetings with stakeholders both in the EU and partner countries. To date, interviews have been held with some 190 persons from close to 120 institutions and companies (see Appendix F), well in line with the target set in the inception report.[109]

[109] The inception report established targets of 40 interviews across EU stakeholders and 15-30 stakeholders per SADC-EPA State.

Remaining work: Further interviews, with a stronger focus on EU stakeholders, notably in the identified priority countries in the EU (see inception report) as well as in relation to the case study work will continue to be held during the remainder of the evaluation.

Regarding the country workshops, these are currently being implemented, with only some minor changes in dates compared to the original plan; these data changes were necessary due to conflicting other events. The dates for the workshops are:

- Mozambique: 26 October 2023 (as planned)
- South Africa (also covering Eswatini and Lesotho): 8 November 2023 (postponed by one week upon request by the EU Delegation)
- Namibia: 16 November 2023 (postponed by one week as a consequence of the shift in South Africa)
- Botswana: 28 November 2023 (postponed from mid-October upon request by the EU Delegation).

The workshops for Botswana, Mozambique and Namibia were converted to half-day workshops considering the relatively limited effects of the EPA as well as the need to ensure wider stakeholder participation. In addition, the possibility of virtual participation in workshops has been foreseen in some countries to allow the participation of interested persons from remote regions that could not be sponsored or would not have the time to travel to the workshop.

Remaining work: The team is presently organising and preparing for the remaining workshops. Workshop reports will be prepared and shared with the participants, as well as provided as appendices to the final evaluation report. Findings from the workshops will be incorporated into the evaluation report as well.

Pillar 4: Consultations with EU institutions

Consultations with EU institutions have taken place on a regular basis, both with regard to substantive and organisational matters. This will continue throughout the remainder of the evaluation. The next ISG meeting to be held is to discuss the interim report.

Pillar 5: Digital engagement with stakeholders and interested persons in general, through website and electronic communication channels

The evaluation website (http://eu-sadc.fta-evaluation.eu) was established during the inception phase and has been updated continuously, notably with information on preliminary findings and on the country workshops. Electronic newsletters have also been sent to the stakeholders in the database to inform them of major developments. Both of these activities will continue during the whole evaluation.

REFERENCES

ACMS, African Centre for Migration and Society (2020), Fact sheet on foreign workers in South Africa overview based on statistics South Africa data (2012-2017): http://www.migration.org.za/wp-content/uploads/2020/05/Fact-Sheet-On-Foreign-Workers-In-South-Africa-Overview-Based-On-Statistics-South-Africa-Data-2012-2017.pdf

Adebola, Titilayo. 2023. 'The Legal Construction of Geographical Indications in Africa'. The Journal of World Intellectual Property 26 (1): 3–29. https://doi.org/10.1111/jwip.12255.

AfDB, African Development Bank (2012), A Comparison of Real Household Consumption Expenditures and Price Levels in Africa: https://www.afdb.org/fileadmin/uploads/afdb/Documents/Publications/Household%20Consumption%20Report.pdf

Africa Press (2021), Spotlight on women cross border traders, https://www.africa-press.net/lesotho/all-news/spotlight-on-women-cross-border-traders#:~:text=Female%20cross%20border%20traders%20face%20specific%20challenges%20such,the%20fact%20that%20they%20are%20a%20disadvantaged%20gender

African Union (2023). Lesotho: country food and agriculture delivery compact: https://www.afdb.org/sites/default/files/documents/publications/lesotho_country_food_and_agriculture_delivery_compact.pdf

AfricaPortal, (2021), Women without borders: What the AfCFTA can do for Botswana's informal cross border traders, https://africaportal.org/feature/women-without-borders-what-the-afcfta-can-do-for-botswanas-informal-cross-border-traders/

AfroNews (2021), Namibia: Trade Openness Can Empower Women – Schultz, https://afro.news/2021/05/14/namibia-trade-openness-can-empower-women-schultz/

Aga, G. et al. (2019), Informal firms in Mozambique: status and potential: https://documents1.worldbank.org/curated/en/275211562775522380/pdf/Informal-Firms-in-Mozambique-Status-and-Potential.pdf

Agricultural Partnership (2022), Report from the 3rd meeting, November 2022: https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/30f8aa55-122c-4476-a910-44200f579c84/details

AllAfrica, (2021), Namibia: Paving Ways for Women in Trade Through AfCFTA, https://allafrica.com/stories/202107191013.html

Allenbach-Ammann, J. (2022), EU minimum wage directive gets final stamp of approval: https://www.euractiv.com/section/economy-jobs/news/eu-minimum-wage-directive-gets-final-stamp-of-approval/

Amnesty International (2023). The state of the world's human rights: https://www.amnesty.org/en/documents/pol10/5670/2023/en/

Anti-Slavery International (no date), Products of Slavery and Child Labour: https://www.antislavery.org/wp-content/uploads/2016/11/products_of_slavery_and_child_labour_2016.pdf

April W., (2021), Youth Entrepreneurship and SME Challenges – Namibia in the COVID-19 Scenario, University of Namibia, https://www.researchgate.net/publication/349366507_Youth-Entrepreneurship-and-SME-Challenges_-Namibia-in-the-COVID-19-Scenario

April, W., I. (2022), Women Entrepreneurs in Namibia: https://www.researchgate.net/publication/361483322_Women_Entrepreneurs_in_Namibia

ATUSWA (the Amalgamated Trade Union of Swaziland) (2022), ATUSWA welcomes the intervention by the Labour Advisory Board on the garment dispute: https://www.atuswa.com/2022/04/29/atuswa-welcomes-the-intervention-by-the-labour-advisory-board-on-the-garment-dispute/

Automotive World (2014). Water, water, everywhere in vehicle manufacturing: https://www.automotiveworld.com/articles/water-water-everywhere-vehicle-manufacturing/

Bailey, K., Basu, A. & S. Sharma (2022). The environmental impact of fast fashion on water quality: a systematic review: https://www.mdpi.com/2073-4441/14/7/1073

Balchin, N. et al. (2017), Economic transformation and job creation in Mozambique: https://set.odi.org/wp-content/uploads/2017/10/Economic-transformation-and-job-creation-in-Mozambique-Full-Synthesis-Paper_Oct-2017.pdf

Bastida, M. (2021), Women's entrepreneurship and self-employment, including aspects of gendered Corporate Social Responsibility: https://www.europarl.europa.eu/RegData/etudes/STUD/2021/694301/IPOL_STU(2021)694301_EN.pdf

Bertelsmann Foundation (2022). Eswatini country report, https://bti-project.org/en/reports/country-report/SWZ

Bertelsmann Foundation (2022a). Lesotho country report: https://bti-project.org/en/reports/country-report/LSO

BEUC (2018), The consumer checklist for a positive EU-New Zealand trade agreement: https://www.beuc.eu/sites/default/files/publications/beuc-x-2018-052_joint_eu_nz_recommendations_long_version_final.pdf

BEUC (2022), EU-New Zealand trade agreement. BEUC reaction to the concluded agreement: https://www.beuc.eu/sites/default/files/2022-08/BEUC-X-2022-084_BEUC_reaction_to_the_EU-New_Zealand_Trade_Agreement_0.pdf

Bimha, H., Sridhar, P. (2018), Challenges faced by women entrepreneurs in Small and Medium Enterprises in Swaziland: https://pdfs.semanticscholar.org/5e03/a76966b9d8c6fe307a7ea33d4b5a94533309.pdf

BKP (2021), Sustainability Impact assessment (SIA) in support of trade negotiations with Angola for EU-SADC EPA accession: https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/c882a126-4621-423f-82f6-4115d0c7123b/details

Blessing, J. (2017), EGP Project on Women and Mining in Mozambique: https://goxi.org/blog/egp-project-on-women-and-mining-in-mozambique

Bobek V. (2022), The Impact of Women's Economic Empowerment on the Rise of Female Entrepreneurship in Namibia, https://www.researchgate.net/publication/366513121_The_Impact_of_Women's_Economic_Empowerment_on_the_Rise_of_Female_Entrepreneurship_in_Namibia

British American Tobacco (2017), Enabling the farmers we work with to thrive. Sustainable agriculture and farmer livelihoods focus report 2017: https://spcommreports.ohchr.org/TMResultsBase/DownLoadFile?gId=34141

Brixiová, Z., Kangoye, T. (2015), Gender and Constraints to Entrepreneurship in Africa: New Evidence from Swaziland: https://www.researchgate.net/publication/286639318_Gender_and_constraints_to_entrepreneurship_in_Africa_New_evidence_from_Swaziland

Brixiová, Z., Kangoye, T. (2018), Skills as a Barrier to Women's Start Ups: A Model with Evidence from Eswatini: https://custom.cvent.com/4E741122FD8B4A1B97E483EC8BB51CC4/files/f926b35b38fd4ec189e321b0399b71a3.pdf

Brixiová, Z., Kangoye, T. (2019), Networks, Start-Up Capital, and Women's Entrepreneurial Performance in Africa: Evidence from Eswatini: https://docs.iza.org/dp12198.pdf

BTI (2022), Eswatini Country Report 2022: https://bti-project.org/en/reports/country-report/SWZ

Buenos Aires Declaration on Women and Trade, (2017): https://www.wto.org/english/news_e/news17_e/mc11_12dec17_e.htm

Bureau of Statistics, Lesotho (2009), Population and Housing Census 2006: [.pdf file]

Bureau of Statistics, Lesotho (2018), Continuous Multipurpose Survey 2014-2015: https://catalog.ihsn.org/catalog/8291/related-materials

Bureau of Statistics, Lesotho (2018a), Population and Housing Census 2016: https://catalog.ihsn.org/catalog/8293/related-materials

Bureau of Statistics, Lesotho (2019), Multiple Indicator Cluster Survey 2018: https://mics-surveys-prod.s3.amazonaws.com/MICS6/Eastern%20and%20Southern%20Africa/Lesotho/2018/Survey%20findings/Lesotho%202018%20MICS%20Survey%20Findings%20Report_English.pdf

Bureau of Statistics, Lesotho (2019a), Lesotho Labour Force Survey 2019 Indicators: https://www.bos.gov.ls/New%20Folder/Copy%20of%20Demography/Lesotho_Labour_Force_Survey_2019_Indicators.pdf

Business (2020), Lesotho, SA agree to establish cross-border benefit pact: https://maserumetro.com/news/business/lesotho-sa-agree-to-establish-cross-border-benefit-pact/

Business in South Africa (no date): https://www.businessinsa.com/mvo/

Capacity4dev (2018), Mining, displacement and empowerment: Working with resettled women in Mozambique: https://capacity4dev.europa.eu/articles/mining-displacement-and-empowerment-working-resettled-women-mozambique_en

CAS (2018), Record of proceedings: https://www.ilo.org/wcmsp5/groups/public/---ed_norm/---normes/documents/publication/wcms_643937.pdf

CAS (Committee on the Application of Standards) (2021), Record of proceedings: https://www.ilo.org/wcmsp5/groups/public/---ed_norm/---normes/documents/publication/wcms_824686.pdf

CBS (2019). Lesotho: The garment industry in its economic, political and social context: https://research-api.cbs.dk/ws/portalfiles/portal/58520054/Country_Background_Lesotho_04.06.19.pdf

CCTC (Cape Clothing and Textile Cluster) (no date), Sector profile: https://capeclothingcluster.org.za/sector-profile/

CEACR (2013), Annual Report: https://www.ilo.org/public/libdoc/ilo/P/09661/09661(2013-102-1A).pdf

CEACR (2016), Annual Report: https://www.ilo.org/public/libdoc/ilo/P/09661/09661(2016-105-1A).pdf

CEACR (2017), Annual Report: https://www.ilo.org/public/libdoc/ilo/P/09661/09661(2017-106-1A).pdf

CEACR (2018), Annual Report: https://ilo.primo.exlibrisgroup.com/discovery/delivery/41ILO_INST:41ILO_V2/1251899630002676

CEACR (2019), Annual Report: https://ilo.primo.exlibrisgroup.com/discovery/delivery/41ILO_INST:41ILO_V2/1258339380002676

CEACR (2021), Annual Report: https://ilo.primo.exlibrisgroup.com/discovery/delivery/41ILO_INST:41ILO_V2/1266929950002676

CEACR (2022), Annual Report: https://ilo.primo.exlibrisgroup.com/discovery/delivery/41ILO_INST:41ILO_V2/1288107040002676

CEACR (Committee of Experts on the Application of Conventions and Recommendations) (2023), Annual Report: https://www.ilo.org/global/about-the-ilo/newsroom/news/WCMS_868021/lang--en/index.htm

CEDEFOP (no date), Temporary employment 2020: https://www.cedefop.europa.eu/en/tools/skills-intelligence/temporary-employment?year=2020&country=EU#1

CEFS (2023), EU sugar. CEFS statistics 2021-2022 : https://cefs.org/wp-content/uploads/2023/04/CEFS-European-Sugar-Statistics-Report-for-the-marketing-year-2021-22.pdf

CEFS and CIBE (2023), CEFS / CIBE views on the draft Inception Report on SIA in support of the FTA and IPA negotiations between EU and India [position shared with the study team]

CEFS and EFFAT (2022), A Transforming European Sugar Industry: New and Better Jobs in a Competitive, Innovative and Sustainable Industry: https://effat.org/wp-content/uploads/2022/02/Final-report-joint-EFFAT-CEFS-Sugar-Project-EN.pdf

Central Statistical Office, Eswatini (2016), Labour Force Survey 2016: https://www.ilo.org/surveyLib/index.php/catalog/5246/related-materials

Central Statistical Office, Eswatini (2019), The 2017 Population and Housing Census. Volume 3. Internal and international migration: https://www.gov.sz/images/FinanceDocuments/Volume-3.pdf

Central Statistical Office, Eswatini (2019a), The 2017 Population and Housing Census. Volume 5. Literacy and education, economic activity, and youth: https://www.gov.sz/images/FinanceDocuments/Volume-5.pdf

Central Statistical Office, Eswatini (2019b), The 2017 Population and Housing Census. Volume 6. Disability: https://www.gov.sz/images/FinanceDocuments/Volume-6.pdf

Central Statistical Office, Eswatini and UNICEF (2011), Swaziland Multiple Indicator Cluster Survey 2010. Final Report: https://reliefweb.int/report/swaziland/swaziland-multiple-indicator-cluster-survey-2010-final-report

Central Statistical Office, Swaziland (2014), Swaziland Multiple Indicator Cluster Survey 2014. Key Findings: https://www.gov.sz/images/mikfr.pdf

Centre for Human Rights, University of Pretoria (no date), Repository on disability rights in Africa (RODRA): http://www.rodra.co.za/

Cernat, L., Gerard, D., Guinea, O., Isella, L. (2018), European Commission, DG TRADE, Consumer benefits from EU trade liberalisation: How much did we save since the Uruguay Round? http://trade.ec.europa.eu/doclib/docs/2018/february/tradoc_156619.pdf

CGA (South African Citrus Growers' Association) (2016), Annual Report: https://www.citrusresourcewarehouse.org.za/home/document-home/internal-citrus-industry-organisation-publications/annual-reports/cga-annual-reports/3835-cga-annual-report-2016/file

Chemonics (2021). Climate change with conservation agriculture, https://chemonics.com/impact-story/namibian-farmers-fight-effects-of-climate-change-with-conservation-agriculture/

Cherchi & Kirkwood (2019), Crossovers in Botswana: Women Entrepreneurs Who Operate in Male Dominated Sectors - Output for Women Entrepreneurship Study (P164089), https://documents1.worldbank.org/curated/en/290451565250128807/pdf/Crossovers-in-Botswana-Women-Entrepreneurs-Who-Operate-in-Male-Dominated-Sectors-Output-for-Women-Entrepreneurship-Study.pdf

Club of Mozambique (2022), Women entrepreneurs in Mozambique debate old and new challenges in the post-pandemic era: https://clubofmozambique.com/news/women-entrepreneurs-in-mozambique-debate-old-and-new-challenges-in-the-post-pandemic-era-213754/

Correia Nhancale, C. and Velasco, P. (2021), Participação de Mulheres e de Jovens nos Processos de Tomada de Decisão sobre a Utilização das Receitas Destinadas ao Desenvolvimento das Comunidades Locais Afectadas pela Exploração dos Recursos Minerais: https://paane.co.mz/wp-content/uploads/2021/07/Participacao-da-Mulher-e-Jovens-Uso-2.75-00000002.pdf

Costa, C. (2019), The cashew value chain in Mozambique: https://documents1.worldbank.org/curated/en/397581559633461087/pdf/The-Cashew-Value-Chain-in-Mozambique.pdf

Council of the EU (2020), EU Action Plan on Human Rights and Democracy 2020-2024: https://www.consilium.europa.eu/media/46838/st12848-en20.pdf

Council of the EU (no date), Adequate minimum wages in the EU: https://www.consilium.europa.eu/en/policies/adequate-minimum-wages/

DBSA (2023). How can South Africa overcome its water challenges and avoid the African water crisis? https://www.dbsa.org/article/how-can-south-africa-overcome-its-water-challenges-and-avoid-african-water-crisis#:~:text=According%20to%20ESI%20Africa%2C%20%22South,we%20can%20avoid%20Africa's%20water

deVere Acuma, (2022), Botswana has highest number of female entrepreneurs, https://devere-acuma.co.bw/news/Botswana-has-highest-number-of-female-entrepreneurs

DG Internal Market, Industry, Entrepreneurship and SMEs (no date), Support tools and networks for women: https://single-market-economy.ec.europa.eu/smes/supporting-entrepreneurship/women-entrepreneurs/support-tools-and-networks-women_en

DTDA, Danish Trade Union Development Agency (2017), Labour market profile. Mozambique: https://www.ulandssekretariatet.dk/wp-content/uploads/2020/03/Mozambique_lmp_2017.pdf

ECLT (2018), Collaboration between the ECLT Foundation and the Government of Mozambique: https://www.eclt.org/en/news/collaboration-with-mozambique-to-fight-against-child-labour

ECLT (no date), ECLT is committed to fight child labour in Mozambique: https://www.eclt.org/impact/projects/eclt-in-mozambique#introduction

EEAS (2021). The European Union continues to support those facing food insecurity through the World Food Programme: https://www.eeas.europa.eu/delegations/lesotho/european-union-continues-support-those-facing-food-insecurity-through-world-food-programme_en

EEAS (2023). EU Annual Report on Human Rights and Democracy in the World 2022. Country Updates, https://www.eeas.europa.eu/sites/default/files/documents/2023/230629%202022%20EU%20Annual%20Human%20Rights%20and%20Democracy%20Country%20Reports_1.pdf

Egger, E.-M. et al. (2021), The socioeconomic impact of coal mining in Mozambique: https://www.econstor.eu/bitstream/10419/243434/1/wp2021-108.pdf

EIGE (no date), Women's entrepreneurship: https://eige.europa.eu/thesaurus/terms/1435?lang=en

EIGE, European Institute for Gender Equality (2016), Gender impact assessment, Gender mainstreaming toolkit: https://eige.europa.eu/publications/gender-impact-assessment-gender-mainstreaming-toolkit

EITI (2015), Sexto Relatório da ITIEM – Anos de 2013 e 2014. ITIE Moçambique Iniciativa de Transparência na Indústria Extractiva: https://eiti.org/sites/default/files/attachments/2013-2014_mozambique_eiti_report_portugese.pdf

EITI (2022), Mozambique. Independent Report of the Extractive Industry Transparency Initiative. Year: 2020: https://eiti.org/sites/default/files/2023-01/ITIE%20Moc%CC%A7ambique_10o%20Relato%CC%81rio_ENG_1.pdf

EITI (2022a), Anexos - Décimo Relatório ITIE: https://www.itie.org.mz/download/anexos-decimo-relatorio-itie/

Embassy of South Africa in the Netherlands (2023). Textiles, clothing and footwear: https://zuidafrika.nl/trade-investment/ks-textiles/

Environmental Paper Network (2021). The capture of policy-making by the pulp and paper industry is driving mega-fires in Portugal and land grabbing in Mozambique: https://environmentalpaper.org/2021/01/the-capture-of-policy-making-by-the-pulp-and-paper-industry-is-driving-mega-fires-in-portugal-and-land-grabbing-in-mozambique/

Eswatini Positive News (2022), Eswatini Gender Inclusive Finance Roadmap launched: https://eswatinipositivenews.com/2022/08/04/eswatini-gender-inclusive-finance-roadmap-launched/

ETUC (2022), Red card for EU countries over failure to support for workplace safety as fundamental right: https://www.etuc.org/en/pressrelease/red-card-eu-countries-over-failure-support-workplace-safety-fundamental-right

EU (December 2020), EU contribution to the upcoming thematic report on the 10th anniversary of the UN Guiding Principles on Business and Human Rights:

https://www.ohchr.org/sites/default/files/Documents/Issues/Business/UNGPsBHRnext10/inputs/states-igos/EU.pdf

EU Chamber of Commerce and Industry in Southern Africa (2022) *Investment Climate in South Africa. The Views of EU Business – 2022*. EU Chamber of Commerce and Industry in Southern Africa.

EU Council (2023), Council takes action to strengthen social dialogue in the EU: https://ec.europa.eu/social/main.jsp?langId=en&catId=89&furtherNews=yes&newsId=10606

EU Guidelines for the Promotion and Protection of the Rights of the Child: https://violenceagainstchildren.un.org/sites/violenceagainstchildren.un.org/files/documents/political_declarations/europe/eu_guidelines_rights_of_child_0.pdf

Eurofound (2012), Working conditions in Mozambique: https://www.eurofound.europa.eu/sites/default/files/ef_publication/field_ef_document/ef1094en.pdf

Euromonitor (2023). Botswana: pathways to gender-inclusive economic development in Sub-Saharan Africa: A sectoral analysis: https://www.euromonitor.com/contentassets/6a05a3e6f90d42359fd83f627894fb65/pathways-gender-study---botswana-executive-summary-19-jun-23.pdf

European Commission (2012), EU Strategy towards the Eradication of Trafficking in Human Beings 2012-2016: https://ec.europa.eu/anti-trafficking/sites/antitrafficking/files/eu_strategy_towards_the_eradication_of_trafficking_in_human_beings_2012-2016_1.pdf

European Commission (2013), Draft Joint Employment Report: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52013DC0801&from=en

European Commission (2013a), Commission Staff Working Document, Trade and Worst Forms of Child Labour, SWD (2013) 173: https://www.europarl.europa.eu/RegData/docs_autres_institutions/commission_europeenne/swd/2013/0173/COM_SWD(2013)0173_EN.pdf

European Commission (2015), Guidelines on the analysis of human rights impacts in impact assessments for trade-related policy initiatives: http://trade.ec.europa.eu/doclib/docs/2015/july/tradoc_153591.pdf

European Commission (2015). Guidelines on the analysis of human rights impacts in impact assessments for trade-related policy measures: https://circabc.europa.eu/ui/group/7fc51410-46a1-4871-8979-20cce8df0896/library/991d8e1d-dbaa-49d6-8582-bb3aab2cab48/details

European Commission (2015a), Joint Employment Report: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52015DC0700&from=en

European Commission (2016), Joint Employment Report: https://ec.europa.eu/social/main.jsp?pager.offset=10&advSearchKey=joint+employment+report&mode=advancedSubmit&catId=22&policyArea=0&policyAreaSub=0&country=0&year=0

European Commission (2017), Joint Employment Report 2018: http://ec.europa.eu/social/main.jsp?langId=en&catId=101

European Commission (2017a), European Semester factsheet: Women in the labour market: https://ec.europa.eu/info/sites/info/files/european-semester_thematic-factsheet_labour-force-participation-women_en_0.pdf

European Commission (2017b), Commission Communication: Reporting on the follow-up to the EU Strategy towards the Eradication of trafficking in human beings and identifying further concrete actions: https://ec.europa.eu/home-affairs/sites/homeaffairs/files/e-library/documents/policies/organized-crime-and-human-trafficking/trafficking-in-human-beings/docs/20171204_communication_reporting_on_follow-up_to_the_eu_strategy_towards_the_eradication_of_trafficking_in_human_beings.pdf

European Commission (2018), Employment and Social Developments in Europe 2018: https://ec.europa.eu/social/main.jsp?langId=en&catId=89&newsId=9150

European Commission (2018a), Commission Staff Working Document. Individual reports and info sheets on implementation of EU Free Trade Agreements covering period from 1 January 2017 to 31 December 2017: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52018SC0454&from=en

European Commission (2018b), Draft Joint Employment Report 2019: https://ec.europa.eu/info/sites/info/files/file_import/2019-european-semester-draft-joint-employment-report_en_1.pdf

European Commission (2018c), Report on equality between women and men in the EU: [pdf document]

European Commission (2019), Commission Staff Working Document. Corporate Social Responsibility, Responsible Business Conduct, and Business & Human Rights. Overview of Progress: https://ec.europa.eu/docsroom/documents/34963

European Commission (2019a), Employment and Social Developments in Europe 2019: https://ec.europa.eu/commission/presscorner/detail/en/IP_19_3412

European Commission (2019b), Staff Working Document SWD (2019) 143, Corporate Social Responsibility, Responsible Business Conduct, and Business & Human Rights: Overview of Progress: https://ec.europa.eu/docsroom/documents/34482

European Commission (2019c), Commission Staff Working Document. Individual reports and info sheets on implementation of EU Free Trade Agreements covering period from 1 January 2018 to 31 December 2018: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52019SC0370&from=GA

European Commission (2020), New Consumer Agenda. Strengthening consumer resilience for sustainable recovery: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52020DC0696&from=EN

European Commission (2020a), Joint Employment Report 2020: https://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=8270

European Commission (2020b), Gender equality strategy (2020-2025): https://ec.europa.eu/info/policies/justice-and-fundamental-rights/gender-equality/gender-equality-strategy_en

European Commission (2020c), Annex to the Proposal for a Council Decision on guidelines for the employment policies of the Member States: https://eur-lex.europa.eu/resource.html?uri=cellar:8bfc0644-5940-11ea-8b81-01aa75ed71a1.0003.02/DOC_2&format=PDF

European Commission (2020d), Commission Staff Working Document. Individual reports and info sheets on implementation of EU Free Trade Agreements covering period from 1 January 2019 to 31 December 2019: https://ec.europa.eu/transparency/documents-register/detail?ref=COM(2020)705&lang=en

European Commission (2020e), A new industrial strategy for Europe: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52020DC0102&from=IT

European Commission (2020f), Commission Recommendation No. 2020/1563 of 14 October 2020 on energy poverty: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32020H1563&from=EN

European Commission (2021), Sustainable finance package: https://finance.ec.europa.eu/publications/sustainable-finance-package_en

European Commission (2021). Kingdom of Eswatini. Multi-annual Indicative Programme 2021-2027: https://international-partnerships.ec.europa.eu/system/files/2022-10/mip-2022-c2022-7325-eswatini-annex_en.pdf

European Commission (2021a), Joint Employment Report: https://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=8351&furtherPubs=yes

European Commission (2021b), Employment and Social Developments in Europe 2021: https://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=8402&furtherPubs=yes

European Commission (2021c), Guide to fostering women's entrepreneurship: https://eismea.ec.europa.eu/system/files/2022-01/a%20guide%20for%20fostering%20women%27s%20entrepreneurship.pdf

European Commission (2021d), Commission proposes action to uphold child rights and support children in need: https://ec.europa.eu/social/main.jsp?langId=en&catId=1428&furtherNews=yes&newsId=9968

European Commission (2021e), EU Strategy on Combatting Trafficking in Human Beings 2021- 2025: https://home-affairs.ec.europa.eu/system/files_en?file=2021-04/14042021_eu_strategy_on_combatting_trafficking_in_human_beings_2021-2025_com-2021-171-1_en.pdf

European Commission (2021f), Union of Equality: European Commission presents Strategy for the Rights of Persons with Disabilities 2021-2030: https://ec.europa.eu/commission/presscorner/detail/en/ip_21_810

European Commission (2021g), Commission Staff Working Document. Individual reports and info sheets on implementation of EU Free Trade Agreements covering period from 1 January 2020 to 31 December 2020: https://www.eerstekamer.nl/bijlage/20211029/commission_staff_working_document/document3/f=/vlngm55eoxxy.pdf

European Commission (2021h), EU strategy on the rights of the child: https://commission.europa.eu/system/files/2021-09/ds0821040enn_002.pdf

European Commission (2022), Joint Employment Report: https://ec.europa.eu/social/main.jsp?catId=738&langId=en&pubId=8476&furtherPubs=yes

European Commission (2022a), Just and sustainable economy: Commission lays down rules for companies to respect human rights and environment in global value chains: https://ec.europa.eu/commission/presscorner/detail/en/ip_22_1145

European Commission (2022b), Employment and Social Developments in Europe 2022: https://ec.europa.eu/social/main.jsp?langId=en&catId=89&newsId=10330

European Commission (2022c), Commission moves to ban products made with forced labour on the EU market: https://ec.europa.eu/commission/presscorner/detail/en/ip_22_5415

European Commission (2022d), Commission holds consultation with social partners on the forthcoming social dialogue communication: https://ec.europa.eu/social/main.jsp?langId=en&catId=329&furtherNews=yes&newsId=10247

European Commission (2022e), Commission holds a second consultation with social partners on the forthcoming EU initiative to support social dialogue: https://ec.europa.eu/social/main.jsp?langId=en&catId=329&furtherNews=yes&newsId=10286

European Commission (2022f), Commission Staff Working Document. Individual reports and info sheets on implementation of EU Free Trade Agreements covering period from 1 January 2021 to 31 December 2021: https://ec.europa.eu/transparency/documents-register/detail?ref=COM(2022)730&lang=en

European Commission (2022g), Proposal for EU Joint Employment Report (2023): https://commission.europa.eu/system/files/2022-11/COM_2022_783_1_EN.pdf

European Commission (2022h), European Union's actions to end child labour and support sustainable value chains: https://euagenda.eu/upload/publications/eu-side-event-18-may-child-labour-value-chain-programme-en.pdf

European Commission (2022i), Trafficking in human beings: Commission proposes stronger rules to fight the evolving crime: https://ec.europa.eu/commission/presscorner/detail/en/ip_22_7781

European Commission (2022j), Report on the progress made in the fight against trafficking in human beings (Fourth Report): https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52022DC0736&from=EN

European Commission (2023), Communication: Strengthening social dialogue in the European Union: harnessing its full potential for managing fair transitions: https://ec.europa.eu/commission/presscorner/detail/en/ip_23_290

European Commission (2023a), Proposal for a Recommendation on strengthening social dialogue in the European Union: https://ec.europa.eu/commission/presscorner/detail/en/ip_23_290

European Commission (2023b), Corporate sustainability reporting: https://finance.ec.europa.eu/capital-markets-union-and-financial-markets/company-reporting-and-auditing/company-reporting/corporate-sustainability-reporting_en#review

European Commission (2023c), 2023 report on gender equality in the EU: https://commission.europa.eu/system/files/2023-03/annual_report_GE_2023_web_EN_0.pdf

European Commission (no date), Conflict Minerals Regulation: https://policy.trade.ec.europa.eu/development-and-sustainability/conflict-minerals-regulation_en

European Commission (no date, a), EU action for equal pay: https://ec.europa.eu/info/policies/justice-and-fundamental-rights/gender-equality/equal-pay/eu-action-equal-pay_en

European Commission (no date, b), European Child Guarantee: https://ec.europa.eu/social/main.jsp?catId=1428&langId=en

European Commission (no date, c), European Pillar of Social Rights: https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/economy-works-people/jobs-growth-and-investment/european-pillar-social-rights_en

European Commission (no date, d), Energy poverty in the EU: https://energy.ec.europa.eu/topics/markets-and-consumers/energy-consumer-rights/energy-poverty-eu_en

European Commission (no date, e), Deforestation-free products: https://environment.ec.europa.eu/topics/forests/deforestation/regulation-deforestation-free-products_en

European Commission and International Trade Centre (2019), From Europe to the world: understanding challenges for European businesswomen: http://www.intracen.org/uploadedFiles/intracenorg/Content/Publications/From%20Europe%20to%20World%20Women%20EU_final_web.pdf

European Commission and International Trade Centre (2022), Making Mandatory Human Rights and Environmental Due Diligence Work for All Guidance on designing effective and inclusive accompanying support to due diligence legislation: https://international-partnerships.ec.europa.eu/system/files/2022-07/making-mandatory-human-rights-and-environmental-due-diligence-work-for-all_en.pdf

European Commission, (2014), Report – Statistical Data on Women Entrepreneurs in Europe: http://ec.europa.eu/growth/content/study-statistical-data-women-entrepreneurs-europe-0_en

European Commission, (2017c), Progress Report on the implementation of the European Disability Strategy (2010 - 2020): http://ec.europa.eu/social/main.jsp?catId=1137

European Commission, EEAS (2017), Joint communication to the European Parliament and the Council for a renewed impetus of the Africa-EU Partnership: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=JOIN:2017:17:FIN&from=EN

European Commission. 2017. 'Commission Staff Working Document. Country Reports and Info Sheets on Implementation of EU Free Trade Agreements. Accompanying the Document Report from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on Implementation of Free Trade Agreements 1 January 2016 - 31 December 2016'. SWD(2017) 364 final. Brussels: European Commission.

European Commission. 2020. 'Commission Staff Working Document. Individual Reports and Info Sheets on Implementation of EU Free Trade Agreements. Accompanying the Document Report from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on Implementation of EU Trade Agreements 1 January 2019 - 31 December 2019'. SWD(2020) 263 final. Brussels: European Commission.

European Commission. 2021. 'Commission Staff Working Document. Individual Information Sheets on Implementation of EU Trade Agreements. Accompanying the Document Report from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on Implementation and Enforcement of EU Trade Agreements'. SWD(2021) 297 final. Brussels: European Commission.

European Commission. 2022. 'Commission Staff Working Document. Individual Information Sheets on Implementation of EU Trade Agreements. Accompanying the Document Report from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions on Implementation and Enforcement of EU Trade Agreements'. SWD(2022) 730 final. Brussels: European Commission.

European Parliament (2018), The EU sugar sector: https://www.europarl.europa.eu/RegData/etudes/BRIE/2020/652040/EPRS_BRI(2020)652040_EN.pdf

European Parliament (2019). Environmental impact of the textile and clothing industry: https://www.europarl.europa.eu/RegData/etudes/BRIE/2019/633143/EPRS_BRI(2019)633143_EN.pdf

European Parliament (2023), Equal pay for equal work between men and women: Pay transparency and enforcement mechanisms: https://www.europarl.europa.eu/thinktank/en/document/EPRS_BRI(2022)698934

European Platform tackling undeclared work (2017), Member State Factsheets: https://ec.europa.eu/social/main.jsp?catId=1322&langId=en

European Platform tackling undeclared work (2022), Work Programme 2021-2022: https://www.ela.europa.eu/sites/default/files/2022-05/UDW%20Platform%20Work%20Programme%202021-2022%20%20%282022%29_0.pdf

EUROSTAT (2021), Disability statistics - poverty and income inequalities: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Disability_statistics_-_poverty_and_income_inequalities&oldid=561947

EUROSTAT (2022b), Employment – annual statistics: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Employment_-_annual_statistics#Employment_rate_by_level_of_education

EUROSTAT (2022c), Living conditions in Europe - poverty and social exclusion: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Living_conditions_in_Europe_-_poverty_and_social_exclusion&oldid=575050

EUROSTAT (no date a), More people in work: https://ec.europa.eu/eurostat/cache/digpub/european_economy/bloc-1d.html?lang=en

EUROSTAT (no date), EU Labour Force Survey : https://ec.europa.eu/eurostat/web/lfs/data/database

EUROSTAT, (2022), Hours of work - annual statistics: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Hours_of_work_-_annual_statistics

EUROSTAT, (2022a), Accidents at work - statistics by economic activity: https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Accidents_at_work_-_statistics_by_economic_activity#Developments_over_time

EU-SADC Joint Council (2019), Joint Communiqué 1st Meeting of the Joint Council of the EU-SADC Economic Partnership Agreement (EPA) Cape Town, South Africa: https://trade.ec.europa.eu/doclib/docs/2019/february/tradoc_157698.pdf

Fair Planet (2022). How the fashion industry pollutes our water: https://www.fairplanet.org/story/how-the-fashion-industry-pollutes-our-water/

FAO (2017), Formalization of informal trade in Africa. Trends, experiences and socio-economic impacts: https://globalinitiative.net/wp-content/uploads/2018/01/FAO-Formalization-of-informal-trade-in-Africa.pdf

FAO (2017). Building Resilience to Drought in Lesotho: https://www.fao.org/3/CA0143EN/ca0143en.pdf

FAO (2022). Namibia country brief: FAO GIEWS Country Brief on Namibia –

FAO (no date). FAO in Namibia: Namibia at a glance, https://www.fao.org/namibia/fao-in-namibia/namibia-at-a-glance/en/

FAOLEX database (2019), Botswana. Employment Act: https://www.fao.org/faolex/results/details/en/c/LEX-FAOC188885/

FES, ACMS (no date), Fact sheet on foreign workers in South Africa: https://southafrica.fes.de/fileadmin/user_upload/documents/Fact_sheet_on__foreign_workers_for_unionists.pdf

FinMark Trust (2017), FinScope. Micro, Small and Medium Enterprise Survey. Eswatini 2017 Report: https://finmark.org.za/system/documents/files/000/000/214/original/FinScope_MSME_Report_Eswatini_2017.pdf?1601980048

Focus2move (2018), Swaziland Vehicles Industry. New market study release: https://www.focus2move.com/swaziland-vehicles-2017/

FOEI (2020). Gas in Mozambique: A windfall for the industry, a curse for the country: https://www.foei.org/publication/gas-in-mozambique-a-windfall-for-the-industry-a-curse-for-the-country/

Fontana, M. (2000), Modelling the impacts of trade liberalisation on women, at work and at home: https://assets.publishing.service.gov.uk/media/57a08d5840f0b652dd0018fe/R7240.pdf

Fontana, M. (2004), Modelling the effects of trade on women, at work and at home, comparative perspectives: https://www.researchgate.net/publication/4816018_Modelling_the_Effects_of_Trade_on_Women_at_Work_and_at_Home_Comparative_Perspectives

Fontana, M. (2009), Gender justice in trade policy. Gender effects of Economic Partnership Agreements (EPAs): http://oneworldaction.org.uk/GendJustTrad.pdf

Fontana, M. (2020), Guidance note on data analysis for gender and trade assessments: https://www.genderandtrade.com/_files/ugd/c947e9_cc421bda0bd5423eb7e957b685845ebd.pdf

Freedom House (2022). Eswatini country report, https://freedomhouse.org/country/eswatini/freedom-world/2022

Freedom House (2022a). Lesotho country report: https://freedomhouse.org/country/lesotho/freedom-world/2022

Freedom House (2023). Botswana: Freedom in the World report, https://freedomhouse.org/country/botswana/freedom-world/2023

Freedom House (2023a). Mozambique country report, https://freedomhouse.org/country/mozambique/freedom-world/2023

Freedom House (2023a). Namibia: Freedom in the World 2023 country report: https://freedomhouse.org/country/namibia/freedom-world/2023

Freedom House (2023b). South Africa: Freedom in the World 2023 country report: https://freedomhouse.org/country/south-africa/freedom-world/2023

Friedrich Naumann Foundation (2022), COVID-19 impact on women informal cross border traders. A look at Southern Africa: https://www.freiheit.org/sub-saharan-africa/covid-19-impact-women-informal-cross-border-traders#:~:text=About%2093%25%20of%20traders%20in%20Eswatini%20complained%20that,and%20sexual%20abuse%20by%20border%20authorities%20and%20middlemen

Friends of the Earth International (FOEI) (2022). Fueling the crisis in Mozambique: https://www.foei.org/publication/fuelling-the-crisis-in-mozambique/

Fumagalli, L. and Martin, T. (2023), Child labor among farm households in Mozambique and the role of reciprocal adult labor: https://www.sciencedirect.com/science/article/pii/S0305750X22002856

Garises, J.-Ch (2022), Standard Bank Buy-A-Brick project up and running again: https://namibiadailynews.info/standard-bank-buy-a-brick-project-up-and-running-again/

GEM (2019), Women's Entrepreneurship 2018/2019: https://www.gemconsortium.org/report/gem-20182019-womens-entrepreneurship-report

GEM (2020), Country Profile – Mozambique: https://gemconsortium.org/economy-profiles/mozambique-2/policy

GEM (2021), Women's Entrepreneurship 2020/2021: https://www.gemconsortium.org/reports/womens-entrepreneurship

GIZ (2022). Sector Brief Namibia: Renewable Energies, https://www.giz.de/en/downloads/giz2022-en-sector-brief-namibia-renewable-energy.pdf

Global Africa Network (2022), Attractive opportunities in the manufacturing sector available in Lesotho: https://www.globalafricanetwork.com/sadc/invest-in-lesotho/

Global G.A.P. (no date): https://database.globalgap.org/globalgap/indexJSF.faces

Global Slavery Index (2018): https://www.globalslaveryindex.org/

Global Slavery Index (2018a): Africa. Region highlights: https://www.globalslaveryindex.org/2018/findings/regional-analysis/africa/

Global Tobacco Index (2021), Mozambique. 2021 Tobacco industry interference index: [.pdf file]

Government of Eswatini (2021), The Government of the Kingdom of Eswatini, Eswatini pledges to Review and adopt the Action Programme on Combating Child Labour: https://endchildlabour2021.org/wp-content/uploads/2021/06/The-Government-of-the-Kingdom-of-Eswatini.pdf

Government of South Africa (2022). https://www.statssa.gov.za/?p=15991

Human Rights Watch (2019). "We know our lives are in danger". Environment fear in South Africa's mining-affected communities: https://www.hrw.org/report/2019/04/16/we-know-our-lives-are-danger/environment-fear-south-africas-mining-affected

Human Rights Watch (2023). World Report 2023: https://www.hrw.org/world-report/2023

IFAD (2023). Food security and nutrition receive a boost in Mozambique, https://www.ifad.org/en/web/latest/-/food-security-and-nutrition-receive-a-boost-in-mozambique

IFC, International Finance Corporation (2007), Survey on the status of businesswomen in Mozambique: https://www.ifc.org/wps/wcm/connect/topics_ext_content/ifc_external_corporate_site/sustainability-at-ifc/publications/publications_report_surveymozambique__wci__1319578465724

IFC, International Finance Corporation (2022), Country private sector diagnostic. Creating markets in Eswatini. Strengthening the Private Sector to Grow Export Markets and Create Jobs: https://www.ifc.org/content/dam/ifc/doc/mgrt/cpsd-eswatini.pdf

IFRC (2022). Namibia drought assessment report: https://www.ifrc.org/sites/default/files/2022-08/Namibia-drought-assessment-report-2022.pdf

Ihemba S. & S. Esterhuyse (2020). Assessing the sustainability of permitted irrigation from groundwater in the Grootfontein-Tsumeb-Otavi Subterranean Water Control Area in Namibia, https://www.sciencedirect.com/science/article/abs/pii/S2352801X18302327

Ikweli, J. (2021), IMD quer mais mulheres na indústria extractiva em Moçambique: https://ikweli.co.mz/2021/06/23/imd-quer-mais-mulheres-na-industria-extractiva-em-mocambique/

ILO (2009), National Profile of Working Conditions in Mozambique: https://www.ilo.org/wcmsp5/groups/public/---ed_protect/---protrav/---travail/documents/publication/wcms_119345.pdf

ILO (2010), Swaziland. Decent Work Country Programme 2010-2014: https://www.ilo.org/wcmsp5/groups/public/---ed_mas/---program/documents/genericdocument/wcms_561068.pdf

ILO (2011), Mozambique. Decent Work Country Programme 2011-2015: https://www.ilo.org/wcmsp5/groups/public/---africa/---ro-abidjan/---ilo-lusaka/documents/genericdocument/wcms_313040.pdf

ILO (2011a), The enabling environment for women in growth enterprises in Mozambique: https://www.ilo.org/wcmsp5/groups/public/@ed_emp/@emp_ent/@ifp_seed/documents/publication/wcms_184769.pdf

ILO (2012), Good practices and lessons learned on direct interventions for the elimination of the worst forms of child labour in Botswana: https://www.ilo.org/ipec/Informationresources/WCMS_IPEC_PUB_22675/lang--en/index.htm

ILO (2012a), Good practices and lessons learned on the elimination of the worst forms of child labour in Namibia: [.pdf document]

ILO (2013), Estudo sobre a aplicação das Convenções n.° 138 e n.° 182 da OIT e suas recomendações na legislação nacional dos países da CPLP: https://trabalhoinfantil.cplp.org/media/2218/palop_studies_mozambique_pt_web.pdf

ILO (2014), El empleo informal en México: situación actual, políticas y desafíos: http://www.ilo.org/wcmsp5/groups/public/---americas/---ro-lima/documents/publication/wcms_245619.pdf

ILO (2015), Políticas para la formalización de las micro y pequeñas empresas en América Latina: http://www.ilo.org/wcmsp5/groups/public/---americas/---ro-lima/---sro-santiago/documents/publication/wcms_368329.pdf

ILO (2018), Lesotho. Decent Work Country Programme 2018/2019-2022/2023: https://www.ilo.org/wcmsp5/groups/public/---ed_mas/---program/documents/genericdocument/wcms_734419.pdf

ILO (2018a), South Africa. Decent Work Country Programme 2018-2023: https://www.ilo.org/wcmsp5/groups/public/---ed_mas/---program/documents/genericdocument/wcms_674579.pdf

ILO (2019), Namibia, Decent Work Country Programme 2019-2023: https://www.ilo.org/wcmsp5/groups/public/---ed_mas/---program/documents/genericdocument/wcms_774550.pdf

ILO (2019a), Women in business and management: the business case for change. Country snapshots: https://www.ilo.org/wcmsp5/groups/public/---dgreports/---dcomm/---publ/documents/publication/wcms_702188.pdf

ILO (2020a), Botswana, Decent Work Country Programme 2020-2024: https://www.ilo.org/wcmsp5/groups/public/---ed_mas/---program/documents/genericdocument/wcms_754724.pdf

ILO (2022), Eswatini Decent Work Country Programme 2022-2025: https://www.ilo.org/africa/countries-covered/swaziland/WCMS_862507/lang--en/index.htm

ILO (2023), ILO Governing Body, 347th session, March 2023. Report on the status of pending representations submitted under article 24 of the ILO Constitution: https://www.ilo.org/wcmsp5/groups/public/---ed_norm/---relconf/documents/meetingdocument/wcms_869574.pdf

ILO (no date a), Social protection. Eswatini: https://www.social-protection.org/gimi/gess/ShowCountryProfile.action;jsessionid=st_D7VsJ1uTfZgC2wTYJdVuG5vITs6qoPFZblMe1iOFuu76bZ0_b!203667844?iso=SZ

ILO (no date b), ILO indicators of forced labour: https://www.ilo.org/wcmsp5/groups/public/---ed_norm/---declaration/documents/publication/wcms_203832.pdf

ILO (no date), Overview of the informal economy in the European Union: https://www.ilo.org/wcmsp5/groups/public/---europe/---ro-geneva/---sro-budapest/documents/genericdocument/wcms_751319.pdf

ILO NORMLEX (no date): https://www.ilo.org/dyn/normlex/en/f?p=1000:10015:::NO:10015:P10015_DISPLAY_BY,P10015_CONVENTION_TYPE_CODE:1,U

ILOSTAT (no date), Statistics on union membership: https://ilostat.ilo.org/topics/union-membership/

IMF (2016), IMF Working Paper. South Africa: Labor Market Dynamics and Inequality: https://www.imf.org/external/pubs/ft/wp/2016/wp16137.pdf

IMF (2019), IMF Working Paper. Explaining the Shadow Economy in Europe: Size, Causes and Policy Options: [.pdf file]

IMF (2021), IMF Working Paper. Labor Market Reform Options to Boost Employment in South Africa: [.pdf document]

IMF (2022). Kingdom of Lesotho: Selected Issues: https://www.elibrary.imf.org/view/journals/002/2022/162/article-A009-en.xml

IndustriAll (2018). eSwatini: Workers protest textile companies' refusal to increase wages: https://www.industriall-union.org/eswatini-workers-protest-textile-companies-refusal-to-increase-wages

INE (2004), Inquérito integrado à força de trabalho. Relatório final 2004-2005: http://www.ine.gov.mz/operacoes-estatisticas/inqueritos/inquerito-integrado-a-forca-de-trabalho/inquerito-integrado-a-forca-de-trabalho-iftrab-2004-05.pdf/view

INE (2006), Resultados do primeiro inquérito nacional ao sector informal (INFOR – 2004): http://www.ine.gov.mz/operacoes-estatisticas/inqueritos/inqueritos-ao-sector-informal/inquerito-ao-sector-informal-infor-2004/view

INE (2009), Inquérito de Indicadores Múltiplos 2008: https://mics-surveys-prod.s3.amazonaws.com/MICS3/Eastern%20and%20Southern%20Africa/Mozambique/2008/Final/Mozambique%202008%20MICS_Portuguese.pdf

INE (2017), Populacão com deficiência por tipo de deficiência, segundo sexo, área de residência e idade com que contraiu a deficiência. Moçambique, 2017: http://www.ine.gov.mz/iv-rgph-2017/mocambique/05-deficiencias/quadro-14a-populacao-com-deficiencia-por-tipo-de-deficiencia-segundo-sexo-area-de-residencia-e-idade-com-que-contraiu-a-deficiencia-mocambique-2017.xlsx/view

INE (2019), IV recenseamento geral da população e habitação 2017: http://www.ine.gov.mz/iv-rgph-2017/mocambique/censo-2017-brochura-dos-resultados-definitivos-do-iv-rgph-nacional.pdf/view

INE (2021), Inquérito ao Sector Informal - INFOR 2021 - Relatório Final: http://www.ine.gov.mz/operacoes-estatisticas/inqueritos/inqueritos-ao-sector-informal/inquerito-ao-sector-informal_infor_2021.pdf

IPC (2023). Lesotho: Acute Food Insecurity Situation for July – September and Projection for October – March 2023: https://www.ipcinfo.org/ipc-country-analysis/details-map/en/c/1156570/

IPC (2023a). Mozambique: Acute Food Insecurity Situation November 2022-March 2023, https://www.ipcinfo.org/ipc-country-analysis/details-map/en/c/1155848/

IPC (2023a). Namibia: Acute Food Insecurity Situation for July-September 2023 – March 2024 and April – June 2024, https://www.ipcinfo.org/ipc-country-analysis/details-map/en/c/1156545/?iso3=NAM

Iris Group for Management Systems International (report for US Aid) (2019), Gender assessment for USAID/Mozambique country development cooperation strategy: https://pdf.usaid.gov/pdf_docs/PA00WGW3.pdf

ITC Trade Map: https://www.trademap.org/Index.aspx

ITC, International Trade Centre (2020), Mainstreaming Gender in Free Trade Agreements: https://www.intracen.org/uploadedFiles/intracenorg/Content/Publications/ITC%20Mainstream%20Gender_FTA_20200707_web.pdf

ITUC (2022). The 2022 ITUC Global Rights Index: https://files.mutualcdn.com/ituc/files/2022-ITUC-Rights-Index-Exec-Summ-EN_2022-08-10-062736.pdf

ITUC (2023). The 2023 ITUC Global Rights Index: https://www.ituc-csi.org/IMG/pdf/2023_ituc_global_rights_index_en.pdf

ITUC and TUC (2021), Holding eSwatini to Account: Assessing the Country's Compliance with the Commonwealth Charter: https://www.ituc-csi.org/holding-eswatini-to-account

IWGIA (2004). Indigenous peoples' rights in Southern Africa: https://www.iwgia.org/images/publications/0119_SouthernAfricaDoc110Complete.pdf

Jauch, H., Friedrich Ebert Stiftung (2018), Namibia's trade union movement: an overview: https://www.studocu.com/row/document/university-of-namibia/labour-law/nambia-trade-union-movement/24981942

Jenkin N. & E. Hattingh (2022). Designing climate-compatible industrial strategies for South Africa: The textiles value chain, https://www.tips.org.za/images/TIPS_Designing_climate-compatible_industrial_strategies_for_South_Africa_-_The_textiles_value_chain_August_2022.pdf

JNCC & DEFRA (2022). Namibia state of pollution report: https://data.jncc.gov.uk/data/09d2032d-0108-48b6-99ae-a4617ab72fc4/rptp-namibia-evidence-report-state-of-pollution.pdf

Joint Council (2019), Joint Communiqué, the EU-SADC Joint Council meeting in 2019: https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/6235a510-ace6-44c2-87b4-e007fa8a548a/details

Jones, S., Santos, R., Xirinda, G. (2019), Final Report on the Survey of School-to-Work Transitons of University Students: https://www.wider.unu.edu/news/study-reveals-mismatch-between-qualifications-and-market-needs-mozambique

Kalimbo (2023). Inside the gender pay gap: what explains disparities in gender pa in Namibia? https://www.npc.gov.na/wp-content/uploads/2023/06/Gender-Pay-Gap-Policy-Brief-2018.pdf

Kanyenze, G., Lapeyre, F. (2012), ILO Employment Working Paper No. 81. Growth, employment and decent work in Namibia: A situation analysis: https://www.ilo.org/wcmsp5/groups/public/---ed_emp/---emp_policy/documents/publication/wcms_175303.pdf

Karjiker, Sadulla. 2020. 'Geographical Indications : The Cuckoo in the IP Nest'. South African Law Journal 137 (4): 763–91. https://doi.org/10.10520/ejc-jlc_salj-v137-n4-a9.

Kaufmann, F., Simons-Kaufmann, C. (2016), Corporate Social responsibility in Sub-Saharan Africa. Mozambique: https://www.researchgate.net/publication/300123565_Corporate_Social_Responsibility_in_Mozambique

Keeping Children Safe, Child Safeguarding Standards and how to implement them: https://ec.europa.eu/info/sites/info/files/standards_child_protection_kcsc_en_1.pdf

Kiaga, A., Leung, V. (2020), The Transition from the Informal to the Formal Economy in Africa: https://www.ilo.org/wcmsp5/groups/public/---ed_emp/documents/publication/wcms_792078.pdf

Kiratu S. & Roy S., (2010), The Gender Implications of Trade Liberalization in Southern Africa, https://www.iisd.org/system/files/publications/beyond_barriers_gender_south_africa.pdf

Klerk, Mike de. 2019. 'The South African Broiler Industry in the Context of the Relationship between South Africa and the European Union: Competitiveness, Trade and Alternatives for Growth and Development'. PI/2018/399500. Pretoria: EU Delegation in South Africa.

Kloppers H.J. & G.J. Pienaar (2014). The historical context of land reform in South Africa and earl policies, https://www.saflii.org/za/journals/PER/2014/20.html

Korinek et al. (OECD, 2021), Trade and Gender. A framework for analysis: https://www.oecd-ilibrary.org/trade/trade-and-gender_6db59d80-en;jsessionid=Ho7adTgMknZLtJ--r6r33MgQRDxw3cGV5N0ndZZk.ip-10-240-5-11

Kutlina-Dimitrova, Z., Rueda-Cantuche J., M. (2021), More important than ever: employment content of extra-EU exports: https://circabc.europa.eu/ui/group/50a0487d-086a-4a75-a1ff-92bdd2ec2c4b/library/628961d7-1870-4113-9724-ed2bbf19ea84/details

Kutlina-Dimitrova, Z., Rueda-Cantuche, J., M., Piñero, P. (2022), Gender patterns of EU exports: jobs and wage differentials: https://circabc.europa.eu/ui/group/50a0487d-086a-4a75-a1ff-92bdd2ec2c4b/library/14db7b04-99cd-43d6-8465-cb53a3804a61/details

Lassman, A., Mulder, N. (2021), Gender Gaps, Services Trade and Policy Tools to Contribute to Gender Equality: https://www.genderandtrade.com/_files/ugd/c947e9_02555df77ac045f7af679614a587e994.pdf

Lubinga, Moses Herbert, Simphiwe Ngqangweni, Stephanie Van der Walt, Yolanda Potelwa, Bonani Nyhodo, Lucius Phaleng, and Thandeka Ntshangase. 2020. 'Geographical Indications in the Wine Industry: Does It Matter for South Africa?' International Journal of Wine Business Research 33 (1): 47–59. https://doi.org/10.1108/IJWBR-06-2019-0041.

Lucentlands Media (2023), Preparing for 260 million cartons by 2033- The South African Citrus Industry takes stock and looks ahead: https://www.linkedin.com/pulse/preparing-260-million-cartons-2033-south-african-citrus-?utm_source=share&utm_medium=member_ios&utm_campaign=share_via

Madonsela W.S. (2006) The Textile and Clothing Industry in Swaziland, Friedrich-Ebert Stiftung publication: https://library.fes.de/pdf-files/iez/03796/17swaziland.pdf

Malavoloneque M. et al. (2023), Making trade safer for women cross-border traders in Mozambique and Malawi: https://blogs.worldbank.org/trade/making-trade-safer-women-cross-border-traders-mozambique-and-malawi

Maloma Colliery Limited: https://malomacolliery.africa/#services

Mandipaka, F., (2014), Overview of women entrepreneurs in South Africa: https://www.researchgate.net/publication/293317495_Overview_of_Women_Entrepreneurs_in_South_Africa

Maphosa, F. (2021), Corporate Social Responsibility and Strategic Business Planning in Botswana: https://www.researchgate.net/publication/353553107_Corporate_Social_Responsibility_and_Strategic_Business_Planning_in_Botswana

Marenga, R., Kakujaha-Matundu, O. (2019), Sustainable Development and Corporate Social Responsibilities of Foreign Investors in Namibia: Is there a Need for a Mercantile Refocus? https://www.researchgate.net/publication/338140318_Sustainable_Development_and_Corporate_Social_Responsibilities_of_Foreign_Investors_in_Namibia_Is_there_a_Need_for_a_Mercantile_Refocus

Marie-Nelly, M. F., Baskaran, G. (2021), Revitalizing the competitiveness of Lesotho's export manufacturing sector: https://blogs.worldbank.org/africacan/revitalizing-competitiveness-lesothos-export-manufacturing-sector

Marie-Nelly, M.F. & G. Baskaran (2021). Revitalising the competitiveness of Lesotho's export manufacturing sector: https://blogs.worldbank.org/africacan/revitalizing-competitiveness-lesothos-export-manufacturing-sector

Mashilo, A. (2022), Auto manufacturing is changing: how South Africa can adjust to protect workers and jobs: https://theconversation.com/auto-manufacturing-is-changing-how-south-africa-can-adjust-to-protect-workers-and-jobs-188004

Mastercard (2021), Women entrepreneurs are making progress in South Africa, but challenges persist – Mastercard Index, https://www.mastercard.com/news/eemea/en/newsroom/press-releases/press-releases/en/2021/march/women-entrepreneurs-are-making-progress-in-south-africa-but-challenges-persist-mastercard-index/

Mastercard (2022), Mastercard Index of Women Entrepreneurs: https://www.mastercard.com/news/media/phwevxcc/the-mastercard-index-of-women-entrepreneurs.pdf

Mavundla, S., D., Centre for Human Rights, University of Pretoria (2019), Repository on disability rights in Africa (RODRA). Eswatini. Revised country report: http://www.rodra.co.za/eswatini-country-reports/31-countries/eswatini/80-revised-country-report-eswatini-swaziland

Mavundla, S., D., Centre for Human Rights, University of Pretoria (2015), Repository on disability rights in Africa (RODRA). Swziland. Country report: http://www.rodra.co.za/swaziland

Mbaiwa (2023). Basarwa communities, access to ancestral land and user rights: https://www.ngamitimes.co.bw/basarwa-communities-access-to-ancestral-land-and-user-rights/

Mbingo, B. (2023), Maloma declares E200 million dividend, additional 500 jobs: http://new.observer.org.sz/details.php?id=20863

McCaig, B., McMillan, M. (2020), Trade Liberalisation and Labour Market Adjustment in Botswana: https://academic.oup.com/jae/article-abstract/29/3/236/5661656?login=false

Media Institute of Southern Africa (MISA) (2018). Eswatini Transparency Assessment 2018, https://misa.org/wp-content/uploads/2018/09/Eswatini-final.pdf

Migration Data Portal (2021), Migration Data in the Southern African Development Community (SADC): https://www.migrationdataportal.org/regional-data-overview/southern-africa

Ministry of Home Affairs, Lesotho (2022), Launch of Lesotho Migration and Development Policy: https://www.homeaffairs.gov.ls/launch-of-lesotho-national-migration-and-development-policy/

Ministry of Labour and Home Affairs, Botswana (2008), Action Programme towards the elimination of child labour in Botswana 2008-2012: https://www.ilo.org/ipec/Informationresources/WCMS_IPEC_PUB_13395/lang--en/index.htm

Ministry of Labour, Industrial Relations and Employment Creation, Namibia (2017), Namibia informal economy. Case study report 2016-2017: https://mol.gov.na/documents/53329/69995/Informal+Case+Study+Report.pdf/3669c455-1fce-2276-70b6-10ad07df1d6b

Ministry of Labour, Industrial Relations and Employment Creation, Namibia (2010), Namibia Child Activities Survey 2010: https://mol.gov.na/documents/53329/69983/Namibia+Child+Activity+Survey+2010.pdf/ea09b88b-1e8e-7a8c-d6a2-4e4bbd0d2cfe

Minority Rights (2023). Botswana: Basarwa, https://minorityrights.org/minorities/basarwa/#:~:text=Most%20Basarwa%20work%20on%20farms,work%20in%20the%20tourist%20industry.

MiWORC, Migrating for Work Research Consortium (2013), Labour migration by numbers: South Africa's foreign and domestic data.: https://www.ilo.org/wcmsp5/groups/public/---ed_protect/---protrav/---migrant/documents/publication/wcms_379443.pdf

Mlangeni, N. – UNDP (23 May 2020), Digital solutions for business continuity of Eswatini's informal sector: https://www.undp.org/eswatini/blog/digital-solutions-business-continuity-eswatini%E2%80%99s-informal-sector

Mlangeni, N. – UNDP (24 September 2020), Business Growth and Policy Development for Eswatini's Informal Sector: https://eswatini.un.org/en/92442-business-growth-and-policy-development-eswatinis-informal-sector

Mmereki, D. (2016). Status of waste tires and management practice in Botswana: https://www.tandfonline.com/doi/full/10.1080/10962247.2017.1279696

Mncayi, P. (2021), Factors affecting labour absorption in South Africa: https://www.researchgate.net/publication/349560969_Factors_affecting_labour_absorption_in_South_Africa

MNN (2023). Factories leave trail of faeces, chemically polluted water in two major towns: https://lescij.org/2023/02/08/factories-leave-trail-of-faeces-chemically-polluted-water-in-two-major-towns/

Molebatsi, C. (2019). Land grabbing in Botswana: Modern era dispossession: https://www.scielo.org.za/scielo.php?script=sci_arttext&pid=S2415-04952019000200007

Morris, M. et al. (2021), Value Chains and Industrial Development in South Africa: https://commerce.uct.ac.za/sites/default/files/content_migration/commerce_uct_ac_za/869/files/PRISM%2520Working%2520Paper%25202021-3%2520-%2520Morris.pdf

Mosomi, J., Wittenberg, M. (no date), The labor market in South Africa, 2000–2017: https://wol.iza.org/articles/the-labor-market-in-south-africa/long

Moyo, K. (2021), South Africa Reckons with Its Status as a Top Immigration Destination, Apartheid History, and Economic Challenges: https://www.migrationpolicy.org/article/south-africa-immigration-destination-history

Mulaudzi M. & Schachtebeck C., (2022), Challenges faced by female entrepreneurs: The case of the South African learner transport industry: https://www.researchgate.net/publication/361660241_Challenges_faced_by_female_entrepreneurs_The_case_of_the_South_African_learner_transport_industry

Muller, P., Ladher, R., Booth, J., Mohamed, S., Gorgels, S., Priem, M., Blagoeva, T., Martinelle, A., and Milanesi, G. (2022), Annual Report on European SMEs, 2021/22: SMEs and environmental sustainability: https://single-market-economy.ec.europa.eu/smes/sme-strategy/sme-performance-review_en

Naidoo, J. (2023), Clothing and textile industry under attack, says union, as over 120,000 jobs lost since 2005: https://www.iol.co.za/news/south-africa/clothing-and-textile-industry-under-attack-says-union-as-over-120000-jobs-lost-since-2005-e207276d-d6c0-470e-8aa0-c126a474c59d

Nambiar Y. et al. (2019), The stakeholder ecosystem of women entrepreneurs in South African townships, Development Southern Africa, Volume 37 2020 – Issue 1: https://www.tandfonline.com/doi/full/10.1080/0376835X.2019.1657001

Namibia Statistics Agency (2013), Namibia Labour Force Survey. 2012 report: https://d3rp5jatom3eyn.cloudfront.net/cms/assets/documents/p19dmnb3g84n115kkcch9bvsk1.pdf

Namibia Statistics Agency (2014), Namibia Labour Force Survey. 2013 report: https://nsa.nsa.org.na/wp-content/uploads/2021/05/Namibia_Labour_Force_Survey_report_2013.pdf

Namibia Statistics Agency (2016), Namibia 2011 census. Disability report: https://cms.my.na/assets/documents/Namibia_2011_Disability_Report.pdf

Namibia Statistics Agency (2017), Namibia Inter-censal Demographic Survey 2016 Report: https://cms.my.na/assets/documents/NIDS_2016.pdf

Namibia Statistics Agency (2019), Namibia Labour Force Survey. 2018 report: https://www.ilo.org/surveyLib/index.php/catalog/6860/related-materials

Nantege, M., Centre for Human Rights, University of Pretoria (2019), Repository on disability rights in Africa (RODRA). South Africa. Updated country report: http://www.rodra.co.za/country-report-zar/30-countries/south-africa/77-updated-country-report-south-africa

Navarra, C. (2019), Contract Farming in Mozambique: Implications for Gender Inequalities Within and Across Rural Households: https://onlinelibrary.wiley.com/doi/full/10.1111/saje.12222

Ndzinge-Makhamisa, T., Centre for Human Rights, University of Pretoria (2019), Repository on disability rights in Africa (RODRA). Botswana. Updated country report: http://www.rodra.co.za/countries/botswana-all/48-countries/botswana/180-revised-country-report-botswana

Neudert R. & L. Voget-Kleschin (2021). What are the effects of large-scale land acquisition in Africa on selected economic and social indicators: https://www.misereor.org/fileadmin/user_upload_misereororg/publication/en/foodsecurity/study-LSLA.pdf

NISO, FES (2021), Code of Conduct for the Namibian Informal Economy. Breaking new grounds: https://library.fes.de/pdf-files/bueros/namibia/18938.pdf

Ntinda, R., Centre for Human Rights, University of Pretoria (2019), Repository on disability rights in Africa (RODRA). Namibia. Updated country report: http://www.rodra.co.za/index.php/countries/namibia/21-countries/namibia/60-updated-country-report

Nzima, A. (2021), Protect imported motor vehicle industry: http://www.times.co.sz/business/133852-protect-imported-motor-vehicle-industry%E2%80%93sarfed.html

OEC (no date), Raw tobacco in Mozambique: https://oec.world/en/profile/bilateral-product/raw-tobacco/reporter/moz

OECD (2022), Integrating value chains in Southern Africa and the automotive industry: https://www.oecd-ilibrary.org/docserver/86322210-en.pdf?expires=1698417686&id=id&accname=guest&checksum=61DDBB7982C0FEEDDD76FD920621393E

OECD (no date), Trade union dataset: https://stats.oecd.org/Index.aspx?DataSetCode=TUD

Okyere, F. (2019), Drivers of Business Social Responsibity in Lesotho SMMEs: Evidence from Small Manufacturing Firms in the Thetsane Industrial Estate in Maseru: https://www.researchgate.net/publication/336578394_Drivers_of_Business_Social_Responsibity_in_Lesotho_SMMEs_Evidence_from_Small_Manufacturing_Firms_in_the_Thetsane_Industrial_Estate_in_Maseru

Oruko, R.O., Selvarajan, R., Ogola, H.J.O, Edokpayi, J.N. & J.O. Odiyo (2020). Contemporary and future direction of chromium tanning and management in sub Saharan Africa tanneries: https://www.sciencedirect.com/science/article/abs/pii/S0957582019304082

Oxfam (2022), The Crisis of Extreme Inequality in SADC. Fighting austerity and the COVID-19 pandemic: https://policy-practice.oxfam.org/resources/the-crisis-of-extreme-inequality-in-sadc-fighting-austerity-and-the-pandemic-621370/

Parshotam, Asmita. 2021. 'South Africa's International Economic Relations'. In International Economic Law: (Southern) African Perspectives and Priorities, edited by Kholofelo Kugler and Franziska Succker, 57–110. Juta.

Pirio, G., Pittelli, R., Adam, Y. (2020), Corporate Social Responsibility in Mozambique Requires Proven Development Methodologies: https://jpt.spe.org/corporate-social-responsibility-mozambique-requires-proven-development-methodologies

PMI (2021). Assessing human rights impacts in our tobacco supply chain in Mozambique: https://www.pmi.com/sustainability/case-studies-and-market-stories/assessing-human-rights-impacts-in-our-tobacco-supply-chain-in-mozambique

Ranchhod, V., and Che Daniels, R. (2021), Labour Market Dynamics in South Africa at the Onset of the COVID-19 Pandemic: https://www.ncbi.nlm.nih.gov/pmc/articles/PMC8014306/

Rantso, T. (2022), Women Entrepreneurs in Lesotho: https://www.researchgate.net/publication/361418486_Women_Entrepreneurs_in_Lesotho

Republic of Botswana (2021), National Employment Policy for Botswana: https://www.ilo.org/wcmsp5/groups/public/---africa/---ro-abidjan/---ilo-pretoria/documents/publication/wcms_834826.pdf

Republic of Namibia (2017), Namibia's 5th National Development Plan: https://www.ilo.org/wcmsp5/groups/public/---africa/---ro-abidjan/---sro-harare/documents/genericdocument/wcms_744312.pdf

República de Moçambique (2012), Plano Nacional da Área da Deficiência – PNAD II 2012 – 2019: https://www.un.org/development/desa/disabilities/wp-content/uploads/sites/15/2019/10/Mozambique_National-Plan-of-Action-for-the-Area-of-Disability-%E2%80%93-PNAD-II-2012-2019.pdf

ROSC, Forúm da Sociedade Civil para os Direitos da Criança (2015), Protecção da Criança contra o Trabalho Infantil: https://www.rosc.org.mz/index.php/documentos/policy-brief/4-documento-de-trabalho-nr-5-proteccao-da-crianca-contra-o-trabalho-infantil-2015/file

Rudhumbu, N., Du Plessis, E., Maphosa, C., (2020), Challenges and opportunities for women entrepreneurs in Botswana: revisiting the role of entrepreneurship education: https://www.researchgate.net/publication/341207630_Challenges_and_opportunities_for_women_entrepreneurs_in_Botswana_revisiting_the_role_of_entrepreneurship_education

SADC EPA Outreach (2017). Civil Society Forum 2017: https://sadc-epa-outreach.com/civil-society-forum

SADC. 2020. 'Impact of COVID-19 on SADC Economy'. Vol. 1. Gaborone: SADC. https://www.sadc.int/files/8015/8988/3255/COVID-19_SADC_Economy_Report.pdf.

SADC-EU EPA, Civil Society Forum 2017: https://sadc-epa-outreach.com/civil-society-forum

SARS. 2021. 'Export Duty on Scrap Metal'. South African Revenue Service. https://www.sars.gov.za/wp-content/uploads/Ops/Guides/LAPD-CE-G03-Export-Duty-on-Scrap-Metal.pdf.

SASA (no date), Cane growing in South Africa: https://sasa.org.za/

SASA (South African Sugar Association) (2013), The South African sugar industry and potential expansion of its product chain: https://static.pmg.org.za/150513SASA.pdf

SATI (South African Table Grapes Industry) (2017), Statistics of table grapes in South Africa: https://www.satgi.co.za/statistics-booklet/

SATI (South African Table Grapes Industry) (2023), Statistics of table grapes in South Africa: https://www.satgi.co.za/statistics-booklet/

Sekatane M. (2017), Home Challenges to African Entrepreneurship in the 21st Century Chapter South African Women Entrepreneurs: Challenges and Coping Strategies: https://link.springer.com/chapter/10.1007/978-3-319-61000-9_4

Semente E., (2019), Women Entrepreneurship in Namibia: Challenges and Prospects, IGI Global, https://www.igi-global.com/gateway/article/232736#pnlRecommendationForm

SEPARC, Swaziland Economic Policy Analysis & Research Centre (2018), Industry labour force skills gap investigation, a focus on the automotive, electrical engineering, and ICT industries in Swaziland: https://www.separc.co.sz/wp-content/uploads/2018/04/TVET-Enhancement-Project-Report.pdf

Shale, I., Centre for Human Rights, University of Pretoria (2019), Repository on disability rights in Africa (RODRA). Lesotho. Revised country report: http://www.rodra.co.za/countries/lesotho-documents/51-countries/lesotho/210-lesotho-revised-country-report

Soko, Mills, and Mzukisi Qobo. 2017. 'Economic, Trade and Development Relations between South Africa and the European Union: The End of a Strategic Partnership? A South African Perspective'. South African Journal of International Affairs 24 (2): 137–57. https://doi.org/10.1080/10220461.2017.1338162.

Solidarity Center (2022). Lesotho garment workers stand up to gender violence at work, communities: https://www.solidaritycenter.org/lesotho-garment-workers-stand-up-to-gender-violence-at-work-transform-unions-communities/

Southern Africa Litigation Centre (2023). Botswana High Court ignores Constitution and rules: https://www.southernafricalitigationcentre.org/2023/09/26/botswana-high-court-ignores-constitution-and-rules-there-is-no-right-to-access-information-without-legislation/

Special Committee on Geographical Indications and Trade in Wine and Spirits (2022): Report from the sixth meeting: https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/5592e733-0ccc-4322-9adb-9cad61200e39/details

Special Committee on Geographical Indications and Trade in Wine and Spirits (2021): Report from the fifth meeting: https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/55b773e8-602d-4b92-847d-dbf5287d0b41/details

Special Committee on Geographical Indications and Trade in Wine and Spirits (2020): Report from the fourth meeting [document on file, shared with the study team]

Special Committee on Geographical Indications and Trade in Wine and Spirits (2019): Report from the third meeting [document on file, shared with the study team]

Special Committee on Geographical Indications and Trade in Wine and Spirits (2018): Report from the second meeting [document on file, shared with the study team]

Special Committee on Geographical Indications and Trade in Wine and Spirits (2017): Joint Outcome of the first meeting [document on file, shared with the study team]

Standard Bank (2021), Environmental, Social and Governance Report 2021: https://www.standardbank.com.na/static_file/Namibia/About/Investor%20relations/Reports/2022%20Reports/SBN-ESG.pdf

Statistics Botswana (2008), Labour Force Report 2005-2006:
https://www.statsbots.org.bw/sites/default/files/2005LabourFS_Report_Feb_20_2008.pdf

Statistics Botswana (2009), 2007 Informal sector survey report:
https://www.statsbots.org.bw/sites/default/files/2007informalsectorsurvey_report%281%29.pdf

Statistics Botswana (2014), Population and housing census 2011. Analytical report:
https://www.statsbots.org.bw/sites/default/files/publications/Population%20%26%20Housing%20Census%20Dissemination%20analytical%20report%20.pdf

Statistics Botswana (2015), Labour statistics report 2011:
https://www.statsbots.org.bw/sites/default/files/publications/2011%20Labour%20Statistics%20Report%20.pdf

Statistics Botswana (2017), Multi-topic household survey 2015-2016. Economic Activity Stats Brief:
https://www.statsbots.org.bw/sites/default/files/publications/BMTHS%20Economic%20Activity%20Stats%20Brief%20Aug%2015%202017.pdf

Statistics Botswana (2018), Botswana demographic survey report 2017:
https://www.statsbots.org.bw/sites/default/files/publications/Botswana%20Demographic%20Survey%20Report%202017.pdf

Statistics Botswana (2022), Quarterly Multi-Topic Survey (QMTS), Q4 2021:
https://www.statsbots.org.bw/sites/default/files/publications/Quarterly%20Multi-Topic%20Survey%20Report%20Q4%2C%202021.pdf

Statistics Botswana (2023), Quarterly Multi-Topic Survey (QMTS), Q4 2022:
https://www.statsbots.org.bw/sites/default/files/publications/Quarterly%20Multi-Topic%20Survey%20Quarter%204%2C%202022_0.pdf

Statistics South Africa (2011), Survey of Activities of Young People 2010:
https://www.ilo.org/surveyLib/index.php/catalog/1292/related-materials

Statistics South Africa (2012), Quarterly Labour Force Survey, Q1 2012:
https://www.statssa.gov.za/publications/P0211/P02111stQuarter2012.pdf

Statistics South Africa (2012a), Census 2011. Statistical release:
http://www.statssa.gov.za/census/census_2011/census_products/Census_2011_Statistical%20release.pdf

Statistics South Africa (2021), Survey of Activities of Young People 2019:
http://www.statssa.gov.za/publications/P0212/P02122019.pdf

Statistics South Africa (2022), Quarterly Labour Force Survey, Q1 2022:
https://www.statssa.gov.za/publications/P0211/P02111stQuarter2022.pdf

Statistics South Africa (2022a), South Africa's youth continues to bear the burden of unemployment:
https://www.statssa.gov.za/?p=15407

Statistics South Africa (2023), Three facts about the manufacturing industry (2021):
https://www.statssa.gov.za/?p=16493

Steenkamp, N., C. (2023), Reigniting mining in eSwatini – land of Swazis:
https://www.africanmining.co.za/2023/06/01/reigniting-mining-in-eswatini-land-of-the-swazis/

Stevens, Chris, and Jane Kennan. 2007a. 'Analysis of the Economic and Social Effects of Namibia's Potential Loss of Current Preference to the European Union'. London: Overseas Development Institute.
https://odi.org/en/publications/analysis-of-the-economic-and-social-impacts-of-namibias-potential-loss-of-current-preferences-to-the-european-union/.

Stevens, Chris, and Jane Kennan. 2007b. 'Analysis of the Economic and Social Effects of Botswana's Loss of Preferential Market Access for Beef Exports to the European Union. Final Study'. London: Overseas Development Institute. https://odi.org/en/publications/analysis-of-the-economic-and-social-effects-of-botswanas-loss-of-preferential-market-access-for-meat-exports-to-the-european-union/.

TDC, Trade and Development Committee meeting (February 2018), Annotated agenda:
https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/16a0b1da-3f9c-4074-9236-8d5b58690f39/details

TDC, Trade and Development Committee meeting (February 2019), Annotated agenda:
https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/4fb93961-1d90-4d13-806a-60fdefb676cd/details

TDC, Trade and Development Committee meeting (February 2020), Annotated agenda:
https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/1ca39be3-ec9c-4f8b-b440-f936dd09aa2c/details

TDC, Trade and Development Committee meeting (February 2020a), Joint Communiqué:
https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/e691dd3c-ff13-49f8-b474-194cd3497051/details

TDC, Trade and Development Committee meeting (February 2021), Joint operational conclusions: https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/e1c812e2-06a7-4fdc-84a9-50541dc4a4ed/details

TDC, Trade and Development Committee meeting (November 2018), Annotated agenda: https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/77e8d908-f4c6-4e4d-b823-1d36761e05ff/details

TDC, Trade and Development Committee meeting (November 2021), Joint operational conclusions: https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/24c587c4-55ba-4a99-a67a-122a3694828b/details

TDC, Trade and Development Committee meeting (November 2022), Joint operational conclusions: https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/cd307c6f-f6ed-4afa-bb33-a677e79d8083/details

TechnoServe (2022), How One Woman is Challenging Gender Roles in Mozambique: https://www.technoserve.org/blog/how-one-woman-is-challenging-gender-roles-in-mozambique/

Textile Infomedia (2023). Textile industry in Botswana: https://www.textileinfomedia.com/textile-industry-in-botswana#BotswanaTextileExporter

TFEU (2012), Treaty on the Functioning of the European Union (TFEU), OJ 326 C of 26.10.2012: http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:12012E/TXT

The Bridge (2022), Maloma Colliery: transformation and impact redefined: https://swazibridge.com/article/index.php?iywtrre=flau

The Danish Institute for Human Rights (2023), National Action Plans on Business and Human Rights. South Africa: https://globalnaps.org/country/south-africa/

The Danish Institute for Human Rights (no date a), Signatories for United Nations Guiding Principles on Business and Human Rights: https://sdg.humanrights.dk/en/instrument/signees/16

The Danish Institute for Human Rights (no date), National Action Plans on Business and Human Rights. Mozambique: https://globalnaps.org/country/mozambique/

The World Bank, (2011), Promoting Entrepreneurship in Botswana: Constraints to Micro Business Development: https://documents1.worldbank.org/curated/en/172391468013142290/pdf/599160ESW0P1180mality0survey0and0TA.pdf

The World Bank, (2021f), Women, Business, and the Law 2021, https://www.worldbank.org/content/dam/sites/wbl/documents/2021/02/WBL_Dissemination_Toolkit.pdf

Times of Eswatini (2022), Turning Maloma into "World Class" mine: https://www.pressreader.com/eswatini/times-of-eswatini/20220123/281625308681782

Times of Swaziland (2023). EU's E339M potential for Eswatini textile industry: http://www.times.co.sz/business/141108-eu%E2%80%99s-e339m-potential-for-eswatini-textile-industry.html

Tizora, P. (2021), Women in the SADC economy: Livelihoods upended, but resilience and collaboration shine through: https://finmark.org.za/knowledge-hub/blog/women-in-the-sadc-economy-livelihoods-upended-but-resilience-and-collaboration-shine-through?entity=blog

TotalEnergies (2021). Press release: Total declares force majeure on Mozambique LNG Project: https://mzlng.totalenergies.co.mz/en/press-releases/total-declares-force-majeure-mozambique-lng-project

Trade Forward Southern Africa (2022), Pioneering Mozambican Women in Trade: https://www.tfsouthernafrica.org/pioneering-mozambican-women-in-trade/

Tralac (2017). Lesotho's textiles, apparel and footwear manufacturing industry: https://www.tralac.org/news/article/11501-lesotho-s-textiles-apparel-and-footwear-manufacturing-industry.html

Uassuzo Lopes, E., C., Centre for Human Rights, University of Pretoria (2014), Repository on disability rights in Africa (RODRA). Mozambique. Country report: http://www.rodra.co.za/mozambique

UN (2017), Lesotho. Country analysis: https://minio.dev.devqube.io/uninfo-production-main/794be451-28bb-4e71-8800-5a964d7be664_Lesotho_CCA_Final_22_September_2017.pdf

UN Global Compact (no date): https://www.unglobalcompact.org/what-is-gc

UN OHCHR (no date), National action plans on business and human rights: https://www.ohchr.org/en/special-procedures/wg-business/national-action-plans-business-and-human-rights

UN Women (2020), Eswatini: https://data.unwomen.org/country/eswatini

UN Women (2021), Covid-19 Rapid Gender Assessment – Eswatini: https://data.unwomen.org/sites/default/files/documents/Publications/Eswatini%20RGA.pdf

UNCTAD (2012), Who is benefiting from trade liberalization in Lesotho? A gender perspective: https://unctad.org/system/files/official-document/osg2012d2_en.pdf

UNCTAD (2017), Trade and Gender Toolbox: http://unctad.org/en/PublicationsLibrary/ditc2017d1_en.pdf

UNCTAD (2018), Trade and gender linkages: an analysis of the Southern African Development Community: https://unctad.org/system/files/official-document/ditc2018d1_en.pdf

UNCTAD (2023), Women in Informal Cross-Border Trade in Botswana: A Small- Scale Trader's Guide to Trade Rules and Procedures: https://unctad.org/system/files/information-document/ICBTguide_botswana_01_web.pdf

UNCTAD, (2023a), Training workshop for women small-scale and informal cross-border traders in Mozambique (First), https://unctad.org/meeting/training-workshop-women-small-scale-and-informal-cross-border-traders-mozambique-first

UNCTAD. 2019. 'International Classification of Non-Tariff Measures. 2019 Version'. UNCTAD/DITC/TAB/2019/5. Geneva: United Nations. https://unctad.org/system/files/official-document/ditctab2019d5_en.pdf.

UNDP (2021), The Botswana National Informal Sector Recovery plan launched- Opportunity to build-back-better, https://www.undp.org/botswana/news/botswana-national-informal-sector-recovery-plan-launched-opportunity-build-back-better

UNDP (2021a), Namibia, Multidimensional poverty index report 2021: https://www.unicef.org/esa/media/9041/file/UNICEF-Namibia-Multidimensional-Poverty-Index-2021.pdf

UNDP (2022), UN Staff Submit Views on Marriage and Matrimonial Property Bills: https://www.undp.org/eswatini/news/un-staff-submit-views-marriage-and-matrimonial-property-bills

UNDP (2023), Briefing note for countries on the 2023 Multidimensional Poverty Index. Botswana: https://hdr.undp.org/sites/default/files/Country-Profiles/MPI/BWA.pdf

UNDP (2023a), Briefing note for countries on the 2023 Multidimensional Poverty Index. Eswatini: https://hdr.undp.org/sites/default/files/Country-Profiles/MPI/SWZ.pdf

UNDP (2023b), Briefing note for countries on the 2023 Multidimensional Poverty Index. Lesotho: https://hdr.undp.org/sites/default/files/Country-Profiles/MPI/LSO.pdf

UNDP (2023c), Briefing note for countries on the 2023 Multidimensional Poverty Index. Mozambique: https://hdr.undp.org/sites/default/files/Country-Profiles/MPI/MOZ.pdf

UNDP (2023d), Briefing note for countries on the 2023 Multidimensional Poverty Index. South Africa: https://hdr.undp.org/sites/default/files/Country-Profiles/MPI/ZAF.pdf

UNDP et al. (2021), Botswana National Informal Sector Recovery Plan: https://www.undp.org/botswana/publications/botswana-national-informal-sector-recovery-plan

UNDP, (2022a), Unlocking Opportunities for Basotho Women to Sustain Women-led Enterprises and Job Creation, https://www.undp.org/lesotho/blog/unlocking-opportunities-basotho-women-sustain-women-led-enterprises-and-job-creation

UNDP, (2022b), Capacity Building for Women-led Enterprises in Lesotho, https://www.undp.org/lesotho/speeches/capacity-building-women-led-enterprises-lesotho

UNECA (2018), Informality and Inequality in Africa: Exploring the Linkages: https://repository.uneca.org/handle/10855/24456

UNECA (2019), STEPS Eswatini 2018: Structural transformation, employment, production, and society: https://repository.uneca.org/handle/10855/43140

UNECA (2020), Recent economic and social conditions in Southern Africa: https://repository.uneca.org/bitstream/handle/10855/47538/b12000309.pdf?sequence=1&isAllowed=y

UNECA (2023), Measuring informal cross-border trade is key to monitoring intra-African Trade: https://www.uneca.org/stories/measuring-informal-cross-border-trade-is-key-to-monitoring-intra-african-trade

UNECA, NKC African Economics (2021), Best practices in job creation. Lessons from Africa: https://repository.uneca.org/bitstream/handle/10855/47560/b12000929.pdf?sequence=1&isAllowed=y

UNICEF (2021). Lesotho Child Poverty Report: https://www.unicef.org/esa/media/10666/file/UNICEF-Lesotho-Child-Poverty-Report-2021.pdf

United Nations (2019). Compilation on Lesotho. Report of the Office of the United Nations High Commissioner for Human Rights, UN Doc. A/HRC/WG.6/35/LSO/2.

United Nations (2019a). Lesotho: Tens of thousands 'one step away from famine' as drought impacts harvests and UN launches flash appeal: https://news.un.org/en/story/2019/12/1054081

United Nations (2020). Textile company changes production to COVID-19 Protective gears: https://eswatini.un.org/en/40832-textile-company-changes-production-covid-19-protective-gears

United Nations (2021), Eswatini. Annual results report 2021: https://minio.dev.devqube.io/uninfo-production-main/7f74b433-9c7e-43a3-ba67-3431232ee65a_Eswatini_UNSDCF_Results_report_2021.pdf

United Nations (2021). Compilation on Eswatini, Report of the Office of the United Nations High Commissioner for Human Rights, UN Doc. A/HRC/WG.6/39/SWZ/2.

United Nations (2021a), Eswatini - UN, AfCFTA, Government support women cross border traders, https://eswatini.un.org/en/136273-un-afcfta-government-support-women-cross-border-traders#:~:text=Eswatini%20is%20among%20the%2054%20of%20the%2055,and%20services%2C%20including%20tourism%20and%20other%20business%20services.

United Nations (2021a). Compilation on Namibia. Report of the Office of the United Nations High Commissioner for Human Rights, UN Doc. A/HRC/WG.6/38/NAM/2.

United Nations (2021b). Summary of stakeholders' submissions on Namibia, UN Doc. A/HRC/WG.6/38/NAM/3.

United Nations (2022). South Africa. Compilation of information prepared by the Office of the United Nations High Commissioner for Human Rights, UN Doc. A/HRC/WG.6/41/ZAF/2.

United Nations (2022a). Summary of stakeholders' submissions. Report of the Office of the United Nations High Commissioner for Human Rights, UN Doc. A/HRC/WG.6/41/ZAF/3.

United Nations (2023). Botswana. Compilation of information prepared by the Office of the United Nations High Commissioner for Human Rights, UN Doc. A/HRC/WG.6/43/BWA/2.

United Nations (2023a). Summary of stakeholders' submissions on Botswana*, UN Doc. A/HRC/WG.6/43/BWA/3.

University of Manchester (2022), Shifting South: Regional garment value chains and decent work in Southern Africa: http://blog.gdi.manchester.ac.uk/shifting-south-regional-garment-value-chains-and-decent-work-in-southern-africa/

UNODC (2021), Typical issues in trafficking in persons cases. Regional case digest Southern Africa: https://www.unodc.org/documents/southernafrica/Publications/CriminalJusticeIntegrity/TraffickinginPersons/Regional_Case_Digest_Southern_Africa_-_English.pdf

UNODC (United Nations Office on Drugs and Crime) (2017), Trafficking in Persons in the SADC Region. Statistical report 2014-2016: https://www.unodc.org/documents/southernafrica//Publications/CriminalJusticeIntegrity/TraffickinginPersons/EN_-_TIP_Statistical_Report.pdf

US Department of Labor (2013), Findings on the worst forms of child labor (South Africa): https://www.dol.gov/sites/dolgov/files/ILAB/child_labor_reports/tda2013/southafrica.pdf

US Department of Labor (2013a), Findings on the worst forms of child labor (Namibia): https://www.dol.gov/sites/dolgov/files/ILAB/child_labor_reports/tda2013/namibia.pdf

US Department of Labor (2014), Findings on the worst forms of child labor (Botswana): https://www.dol.gov/sites/dolgov/files/ILAB/child_laor_reports/tda2014/botswana.pdf

US Department of Labor (2014a), Findings on the worst forms of child labor (Lesotho): https://www.dol.gov/sites/dolgov/files/ILAB/child_labor_reports/tda2014/lesotho.pdf

US Department of Labor (2016), Findings on the worst forms of child labor (Eswatini): https://www.dol.gov/sites/dolgov/files/ILAB/child_labor_reports/tda2016/Swaziland2016Report.pdf

US Department of Labor (2019), Findings on the worst forms of child labor (Botswana): https://www.dol.gov/sites/dolgov/files/ILAB/child_labor_reports/tda2019/botswana.pdf

US Department of Labor (2019), Findings on the worst forms of child labor (Eswatini): https://www.dol.gov/sites/dolgov/files/ILAB/child_labor_reports/tda2019/Eswatini.pdf

US Department of Labor (2021), Findings on the worst forms of child labor (Botswana): https://www.dol.gov/agencies/ilab/resources/reports/child-labor/botswana

US Department of Labor (2021a), Findings on the worst forms of child labor (Namibia): https://www.dol.gov/agencies/ilab/resources/reports/child-labor/namibia

US Department of Labor (2021b), Findings on the worst forms of child labor (Eswatini): https://www.dol.gov/agencies/ilab/resources/reports/child-labor/eswatini

US Department of Labor (2021c), Findings on the worst forms of child labor (South Africa): https://www.dol.gov/agencies/ilab/resources/reports/child-labor/south-africa

US Department of Labor (2021d), Findings on the worst forms of child labor (Lesotho): https://www.dol.gov/agencies/ilab/resources/reports/child-labor/lesotho

US Department of Labor (2022), List of Goods Produced by Child Labor or Forced Labor: https://www.dol.gov/agencies/ilab/reports/child-labor/list-of-goods-print

US Department of Labor (2022). Botswana report: https://www.dol.gov/agencies/ilab/resources/reports/child-labor/botswana

US Department of Labor (2022a). Eswatini report: https://www.dol.gov/agencies/ilab/resources/reports/child-labor/eswatini

US Department of Labor (2022b). Lesotho country report: https://www.dol.gov/agencies/ilab/resources/reports/child-labor/lesotho

US Department of Labor (2022c). Mozambique country report: https://www.dol.gov/agencies/ilab/resources/reports/child-labor/mozambique

US Department of Labor (2022d). Namibia report: https://www.dol.gov/agencies/ilab/resources/reports/child-labor/namibia

US Department of Labor (2022e). Child labour in South Africa: https://www.dol.gov/agencies/ilab/resources/reports/child-labor/south-africa

US Department of State (2022), Trafficking in persons report 2022: https://www.state.gov/reports/2022-trafficking-in-persons-report/

US Department of State (2022). Botswana country report: https://www.state.gov/reports/2022-country-reports-on-human-rights-practices/botswana/

US Department of State (2022a), Trafficking in persons report 2022. Botswana: https://www.state.gov/reports/2022-trafficking-in-persons-report/botswana/

US Department of State (2022a). Eswatini country report: https://www.state.gov/reports/2022-country-reports-on-human-rights-practices/eswatini/

US Department of State (2022b), Trafficking in persons report 2022. Eswatini: https://www.state.gov/reports/2022-trafficking-in-persons-report/eswatini/

US Department of State (2022b). Lesotho country report: https://www.state.gov/reports/2022-country-reports-on-human-rights-practices/lesotho/

US Department of State (2022c), Trafficking in persons report 2022. Lesotho: https://www.state.gov/reports/2022-trafficking-in-persons-report/lesotho/

US Department of State (2022d), Trafficking in persons report 2022. Mozambique: https://www.state.gov/reports/2022-trafficking-in-persons-report/mozambique/

US Department of State (2022d). Namibia report, https://www.state.gov/wp-content/uploads/2023/02/415610_NAMIBIA-2022-HUMAN-RIGHTS-REPORT.pdf

US Department of State (2022e), Trafficking in persons report 2022. Namibia: https://www.state.gov/reports/2022-trafficking-in-persons-report/namibia/

US Department of State (2022f), Trafficking in persons report 2022. South Africa: https://www.state.gov/reports/2022-trafficking-in-persons-report/south-africa/

US Embassy in Botswana (2021), Notice of Funding Opportunity – Gaborone Child Labor ARDF Grant: https://bw.usembassy.gov/notice-of-funding-opportunity-gaborone-child-labor-ardf-grant/

US ITA (International Trade Administration) (2021), Lesotho. Country Commercial Guide. Manufacturing: https://www.trade.gov/country-commercial-guides/lesotho-manufacturing

USAID SWP (2021). Mozambique country profile: https://winrock.org/wp-content/uploads/2021/08/Mozambique_Country_Profile-Final.pdf

USDA (US Department of Agriculture) (2023), Annual sugar report. Eswatini: https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Sugar%20Annual_Pretoria_Eswatini_SZ2023-0001.pdf

Vandome, Ch., Vines, A. (2021), Mozambique and the Voluntary Principles on Security and Human Rights: https://www.chathamhouse.org/2021/11/mozambique-and-voluntary-principles-security-and-human-rights/security-business-and-human

Velaphe, N. (no date), Water, textile industry and SACU – the main sources of Lesotho's revenue: https://www.gov.ls/water-textile-industry-sacu-main-source-of-lesothos-revenue-report/

Verité (no date a), Trafficking Risk in Sub-Saharan African Supply Chains. Botswana: https://verite.org/africa/explore-by-country/botswana/

Verité (no date b), Trafficking Risk in Sub-Saharan African Supply Chains. Swaziland: https://verite.org/africa/explore-by-country/swaziland/

Verité (no date c), Trafficking Risk in Sub-Saharan African Supply Chains. Lesotho: https://verite.org/africa/explore-by-country/lesotho/

Verité (no date d), Trafficking Risk in Sub-Saharan African Supply Chains. Mozambique: https://verite.org/africa/explore-by-country/mozambique/

Verité (no date), Trafficking Risk in Sub-Saharan African Supply Chains. South Africa: https://verite.org/africa/explore-by-country/south-africa/

Walk Free (2018), Eradicating modern slavery. An assessment of Commonwealth governments' progress on achieving SDG Target 8.7: https://cdn.walkfree.org/content/uploads/2020/10/12034833/Walk-Free-Eradicating-Modern-Slavery.pdf

Walk Free (2023), Regional findings. Africa: https://www.walkfree.org/global-slavery-index/findings/regional-findings/africa/

Wang K., (2012), The Informal Business Sector: A Survival Strategy for Female Urban Dwellers in Gaborone, Botswana: https://ubrisa.ub.bw/bitstream/handle/10311/1370/Batsalelwang..pdf?sequence=1

WEF (2023). Global Gender Gap Report 2023, https://www.weforum.org/publications/global-gender-gap-report-2023/

WFP (2022). Eswatini. Annual Country report 2022: docs.wfp.org/api/documents/WFP-0000147990/download/?_ga=2.206431760.2040171211.1698661398-825114744.1697380593

WFP (2023). Eswatini country page, https://www.wfp.org/countries/eswatini

WFP (2023a). WFP Mozambique, Country Brief, September 2023: docs.wfp.org/api/documents/WFP-0000153435/download/?_ga=2.5177843.1104558570.1699594875-825114744.1697380593

WFP (2023b). European Union and WFP join hands to tackle hunger amidst conflict in Northern Mozambique, https://www.wfp.org/news/european-union-and-wfp-join-hands-tackle-hunger-amidst-conflict-northern-mozambique#:~:text=The%20European%20Union%20has%20been,of%20people%20affected%20by%20crisis.

WFP (no date). Namibia: https://www.wfp.org/countries/namibia

WhyAfrica (2021), Coal mining brought back to life in Eswatini: https://www.whyafrica.co.za/coal-mining-brought-back-to-life-in-eswatini/

WhyAfrica (2021). Coal mining brought back to life in Eswatini: https://www.whyafrica.co.za/coal-mining-brought-back-to-life-in-eswatini/

Windhoek Observer (2020), Standard Bank relaunched the Buy-a-Brick Footprint: https://www.observer24.com.na/standard-bank-relaunched-the-buy-a-brick-footprint/

WomenConnect (2023), Facilitating cross border trade for women in Eswatini: https://www.womenconnect.org/web/swaziland/cross-border-trade

Wood, Christopher. 2014. 'Why Should the SADC EPA Allow Export Taxes?' Bridges Africa 3 (2). https://www.tralac.org/news/article/5541-why-should-the-sadc-epa-allow-export-taxes.html.

World Bank (2013), Female headed households (% of households with a female head) – Namibia: https://data.worldbank.org/indicator/SP.HOU.FEMA.ZS?locations=NA

World Bank (2014), Botswana Labor Market Signals on Demand for Skills: https://openknowledge.worldbank.org/handle/10986/21077

World Bank (2016), Business Survey. Lesotho country profile: https://openknowledge.worldbank.org/handle/10986/25907

World Bank (2018), Overcoming Poverty and Inequality in South Africa. An Assessment of Drivers, Constraints and Opportunities: https://openknowledge.worldbank.org/handle/10986/29614

World Bank (2018a), Mozambique Poverty Assessment: https://documents1.worldbank.org/curated/en/377881540320229995/pdf/131218-WP-P162550-PUBLIC-FRI-OCT-26-7AM-DC-DIGITAL-Mozambique-Poverty-Assessment-2018.pdf

World Bank (2019), Lesotho Poverty Assessment. Progress and Challenges in Reducing Poverty: https://openknowledge.worldbank.org/handle/10986/33030

World Bank (2020), Poverty and Shared Prosperity 2020. Reversals of Fortune: https://openknowledge.worldbank.org/handle/10986/34496

World Bank (2020a), The Kingdom of Eswatini Toward Equal Opportunity. Accelerating Inclusion and Poverty Reduction. Systematic Country Diagnostic: https://openknowledge.worldbank.org/handle/10986/34970

World Bank (2020b), Women and Trade: The Role of Trade in Promoting Women's Equality: https://www.worldbank.org/en/topic/trade/publication/women-and-trade-the-role-of-trade-in-promoting-womens-equality

World Bank (2021), Lesotho: A New Social Protection Assessment Aims to Help Strengthen Policies and Programs for the Poor: https://www.worldbank.org/en/news/press-release/2021/07/05/lesotho-a-new-social-protection-assessment-aims-to-help-strengthen-policies-and-programs-for-the-poor

World Bank (2021). Eswatini Textiles and Clothing exports by country in US$ Thousand 2021: https://wits.worldbank.org/CountryProfile/en/Country/SWZ/Year/LTST/TradeFlow/Export/Partner/by-country/Product/50-63_TextCloth

World Bank (2021a), Business Survey. South Africa 2020, country profile: https://www.enterprisesurveys.org/content/dam/enterprisesurveys/documents/country/South-Africa-2020.pdf

World Bank (2021a). Poverty and Equity Brief. Namibia, April 2021: https://databankfiles.worldbank.org/public/ddpext_download/poverty/987B9C90-CB9F-4D93-AE8C-750588BF00QA/AM2020/Global_POVEQ_NAM.pdf

World Bank (2021c), Lesotho, https://genderdata.worldbank.org/countries/lesotho/

World Bank (2021d), Women, Business and The Law 2021. Eswatini : https://wbl.worldbank.org/content/dam/documents/wbl/2021/snapshots/Eswatini.pdf

World Bank (2021e), Women, Business, and the Law 2021. Mozambique: https://wbl.worldbank.org/content/dam/documents/wbl/2021/snapshots/Mozambique.pdf

World Bank (2022), Breaking Barriers: Female Entrepreneurs Who Cross Over to Male-Dominated Sectors: https://openknowledge.worldbank.org/handle/10986/36940

World Bank (2022a), Trade facilitation and gender dimensions in South Africa: survey findings and recommendations: https://www.worldbank.org/en/topic/trade/publication/trade-facilitation-and-gender-dimensions-in-south-africa

World Bank (2022b), Unemployment, total (% of total labor force) (modeled ILO estimate) – Mozambique: https://data.worldbank.org/indicator/SL.UEM.TOTL.ZS?locations=MZ

World Bank (2023), The World Bank in Eswatini. Overview: https://www.worldbank.org/en/country/eswatini/overview

World Bank (2023). Namibia: https://thedocs.worldbank.org/en/doc/bae48ff2fefc5a869546775b3f010735-0500062021/related/mpo-nam.pdf

World Bank (2023). Poverty and equity brief. April 2023. Mozambique, https://databankfiles.worldbank.org/public/ddpext_download/poverty/987B9C90-CB9F-4D93-AE8C-750588BF00QA/current/Global_POVEQ_MOZ.pdf

World Bank (2023). South Africa overview, https://www.worldbank.org/en/country/southafrica/overview#:~:text=Inequality%20remains%20among%20the%20highest,slightly%20below%20its%20pandemic%20peak.

World Bank (2023a), The World Bank in Mozambique. Overview: https://www.worldbank.org/en/country/mozambique/overview

World Bank (no date a), Poverty and Inequality Platform. Botswana: https://pip.worldbank.org/country-profiles/BWA

World Bank (no date b), Poverty and Inequality Platform. Eswatini: https://pip.worldbank.org/country-profiles/SWZ

World Bank (no date c), Poverty and Inequality Platform. Lesotho: https://pip.worldbank.org/country-profiles/LSO

World Bank (no date d), Poverty and Inequality Platform. Mozambique: https://pip.worldbank.org/country-profiles/MOZ

World Bank (no date e), Poverty and Inequality Platform. Namibia: https://pip.worldbank.org/country-profiles/NAM

World Bank (no date f), Poverty and Inequality Platform. South Africa: https://pip.worldbank.org/country-profiles/ZAF

World Bank (no date), Poverty and Inequality Platform: https://pip.worldbank.org/home

World Bank Group (2015), Botswana Poverty Assessment: https://openknowledge.worldbank.org/handle/10986/23577

World Bank Group (2021). Climate risk country profile: Lesotho, https://climateknowledgeportal.worldbank.org/sites/default/files/2021-08/15930-WB_Lesotho%20Country%20Profile-WEB.pdf

World Bank, (2020c), Lesotho: https://genderdata.worldbank.org/countries/lesotho/

World Bank, (2020d), Women, Business, and the Law 2020, https://wbl.worldbank.org/content/dam/documents/wbl/2020/sep/Lesotho.pdf

World Bank, (2021b), Women, Business, and the Law 2021. Botswana: https://wbl.worldbank.org/content/dam/documents/wbl/2021/snapshots/Botswana.pdf

World Bank, (2021g), Women, Business, and the Law 2021 – Namibia, https://wbl.worldbank.org/content/dam/documents/wbl/2021/snapshots/Namibia.pdf

World Inequality Database (no date): https://wid.world/

WTO Secretariat. 2016. 'Trade Policy Review: Southern African Customs Union. Report by the Secretariat'. WT/TPR/S/324/Rev.1. Geneva: WTO.

WTO Secretariat. 2023a. 'Trade Policy Review: European Union. Report by the Secretariat'. WT/TPR/S/442. Geneva: WTO.

WTO Secretariat. 2023b. 'Trade Policy Review: Southern African Customs Union. Report by the Secretariat'. WT/TPR/S/447. Geneva: WTO.

Yager, T. (2021), The mineral industry of Mozambique: https://d9-wret.s3.us-west-2.amazonaws.com/assets/palladium/production/s3fs-public/atoms/files/myb3-2016-mz.pdf

Yiwei G. (2019). Three ways coal is depleting the world's water resources, Greenpeace publication: https://www.greenpeace.org/international/story/21524/3-ways-coal-is-depleting-the-worlds-water-resources/

Zwane, S., Phungwayo, P. (2023), TUCOSWA: LAB agree on five labour issues: http://www.times.co.sz/news/139963-tucoswa-lab-agree-on-5-labour-issues.html

HOW TO OBTAIN EU PUBLICATIONS

Free publications:

- one copy:
  via EU Bookshop (http://bookshop.europa.eu);

- more than one copy or posters/maps:
  from the European Union's representations (http://ec.europa.eu/represent_en.htm);
  from the delegations in non-EU countries
  (http://eeas.europa.eu/delegations/index_en.htm);
  by contacting the Europe Direct service (http://europa.eu/europedirect/index_en.htm)
  or calling 00 800 6 7 8 9 10 11 (freephone number from anywhere in the EU) (*).

  (*) The information given is free, as are most calls (though some operators, phone boxes or hotels may charge you).

Priced publications:

- via EU Bookshop (http://bookshop.europa.eu).

Priced subscriptions:

- via one of the sales agents of the Publications Office of the European Union
  (http://publications.europa.eu/others/agents/index_en.htm).

[Catalogue number]

Publications Office