

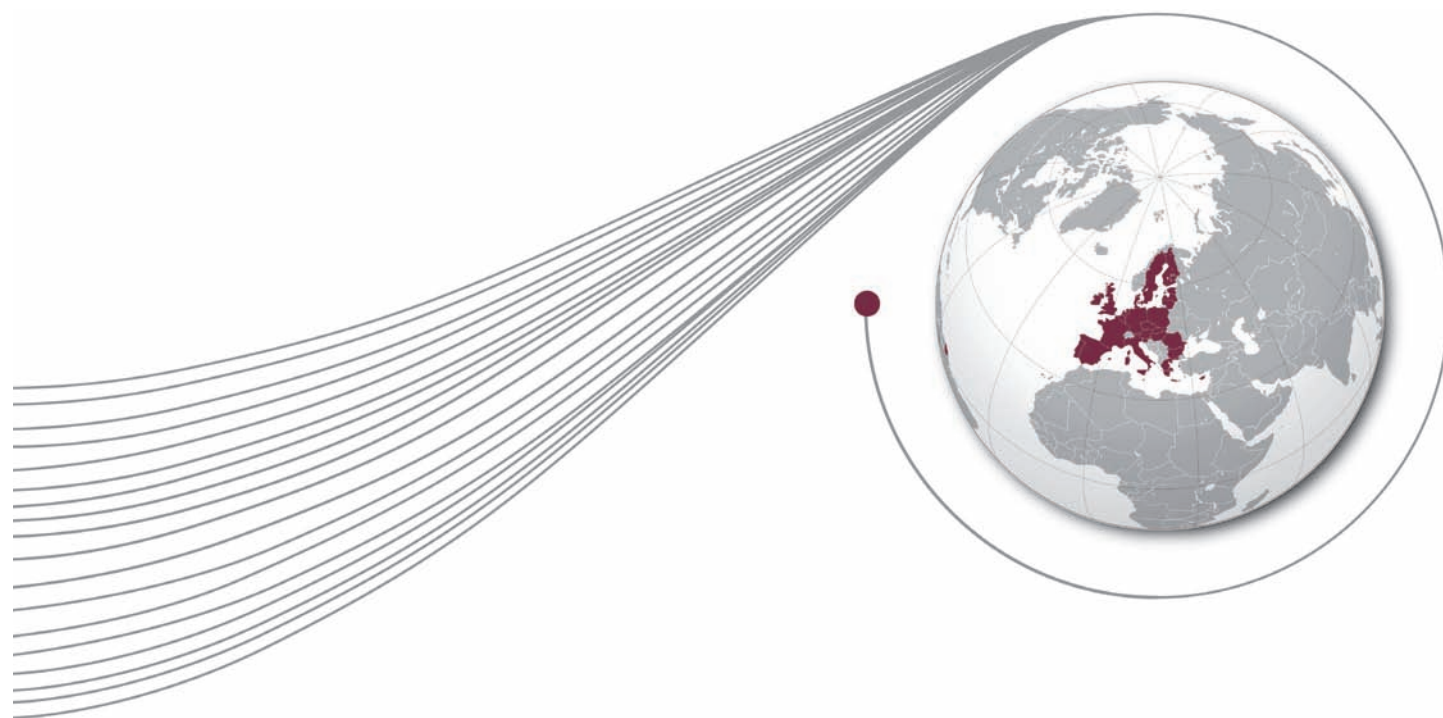
Mapping EU Strategic Partnerships

Giovanni Grevi (ed.) with Gauri Khandekar

FRIDE
A EUROPEAN
THINK TANK FOR GLOBAL ACTION

Index

Foreword	5
Introduction	6
Brazil	10
Canada	14
China	18
India	22
Japan	26
Mexico	30
Russia	34
South Africa	38
South Korea	42
United States	46
Comparative Indicators	50
List of Abbreviations	56



About the Authors

Giovanni Grevi is a senior researcher at FRIDE and head of FRIDE's Brussels office.

Gauri Khandekar is a junior researcher at FRIDE.

About FRIDE

FRIDE is an independent think-tank based in Madrid, focused on issues related to democracy and human rights; peace and security; and humanitarian action and development. FRIDE attempts to influence policy-making and inform public opinion, through its research in these areas.

Foreword

This publication provides a snapshot of the ten so-called EU strategic partnerships. Drawing on an extensive collection of statistical data and other indicators across a variety of policy areas, it offers the first comparative overview of the ten global and regional powers that feature in this distinctive, if ill-defined, category.

Individual country briefs assess the state-of-play of the EU's bilateral relations with each partner, outlining their strengths and weaknesses, priorities and outlook. Experts from FRIDE and other organisations have contributed as follows:

- Brazil (Susanne Gratius)
- Canada (Giovanni Grevi)
- China (Jonathan Hoslag, Free University of Brussels/Vrije Universiteit Brussel)
- India (Gauri Khandekar)
- Japan (Giovanni Grevi and Elena Atanassova-Cornelis, University of Antwerp and Catholic University of Leuven)
- Mexico (Susanne Gratius)
- Russian Federation (Natalia Shapovalova)
- South Africa (Oladiran Bello)
- South Korea (Gauri Khandekar)
- United States (Giovanni Grevi)

Such deliberately compact analyses are accompanied by factual information on each of the ten countries and relevant EU data to complete the picture. An overall introduction framing the issue of the EU's strategic partnerships precedes the ten country briefs, outlining the main questions and

insights that emerge from the mapping exercise. A separate introduction to the comparative table included at the end of this publication also highlights some of the main findings therein.

Data has been drawn from a variety of authoritative sources, including the United Nations, the World Bank, the International Monetary Fund, the Organisation for Economic Cooperation in Europe, the International Energy Agency, the US Energy Information Administration as well as, of course, the EU. Non-governmental sources include the World Economic Forum, INSEAD Business School, Gallup, Transparency International as well as think tanks such as the Stockholm International Peace Research Institute (SIPRI), the International Institute for Strategic Studies (IISS), the Centre for Transatlantic Relations of the Johns Hopkins University and the Egmont Institute. Where available, figures for the EU are taken from the same sources as those used for its strategic partners, in addition to public EU datasets (Eurostat) and think tanks such as the EU Institute for Security Studies.

The purpose of this exercise is not to provide comprehensive coverage of all relevant statistical information, and even less so a conclusive analysis of the politics and perspectives of each strategic partnership. 'Mapping EU strategic partnerships' seeks, rather, to capture some of the salient features of each partnership and of the respective partners as key international actors, thereby paving the way for more consistent and regular scrutiny of these important bilateral relations. This publication aims to help foster a truly strategic debate on bilateral partnerships that will contribute to defining, in different ways, the role and influence of the EU in a changing global context.

Introduction

Strategic partnerships: smart grid or talking shops?

Bilateral partnerships between major global and regional power centres are an emerging feature of international relations. As power grows more diffuse, those countries holding large shares of it and able to connect with one another see their international role enhanced. There are fewer constraints on their influence and the demand for their leadership increases. Like-mindedness between pivotal players will be a valued asset in an increasingly competitive global market of ideas. Conversely, when diverging interests drive multilateral negotiations to gridlock, structured bilateral relations will be critical to facilitate mutual understanding and rapprochement. As responsibility for the provision of global public goods such as an open trade system and a stable monetary order risks being diluted, bilateral partnerships can generate initiatives that attract others, or boost multilateral efforts to address shared challenges.

These partnerships are not the only, or even the predominant, level of engagement in a pluralist international system that features multiple networks of state and non-state actors and formats for cooperation. However, their relative importance is arguably on the rise. They offer a critical political infrastructure to address tensions, pursue mutual interests and pave the way for collective action. The connection between overlapping bilateral partnerships can be regarded as constituting a ‘smart grid’ for global politics. Yet activating such a grid will be a gradual and contested process, as the experience of strategic partnerships in general, and of those of the EU in particular, shows.

The EU has tapped into this trend by establishing strategic partnerships with ten countries of systemic importance at the global or regional level.

Some of these partnerships go back to the early 1990s, while most were set up or upgraded over the last decade. This dimension of EU foreign policy gained new prominence in 2010, when the President of the European Council and other EU leaders stressed the importance of strategic partnerships for the prosperity and security of the Union. This clearly resonated with the perspective of a multi-partner world which US Secretary of State Clinton outlined in 2009 as a driving objective of US foreign policy.

Since the September 2010 European Council dedicated to this issue, work on strategic partnerships has advanced in a discontinuous way alongside the laborious set-up of the European External Action Service, while the political focus of the EU and its member states shifted to the dramatic events unfolding in North Africa and the Middle East. One year on, amid weakening international consensus on a deepening global economic crisis, the political cohesion of the Union faces a severe test. Its credibility as an international actor is questioned within and outside the EU. Mobilising critically important bilateral relations is essential for the Union to reverse this trend, achieve its strategic goals and confirm its status as a global actor in its own right.

The mapping exercise that this publication offers provides relevant insights and raises important political questions concerning the state-of-play and the future of the EU’s strategic partnerships.

- First, it highlights the heterogeneity of the countries commonly defined as strategic partners, and of the EU’s relationships with them. Some are

broadly like-minded partners (e.g. the US, Canada and Japan) while others feature a significantly different set of value systems and therefore priorities (e.g. Russia and China). Some partners are global players (e.g. the US and China) while others are important regional powers (e.g. Mexico, South Africa and South Korea), with extra-regional influence in some policy areas. Some are advanced countries (e.g. Canada, Japan and the US) while some are rapidly approaching the level of middle-income countries (e.g. Brazil and China). Yet others are rising powers still affected by big developmental challenges (e.g. India and South Africa) and Russia is arguably a country in socio-economic decline. All strategic partners are geographically distant from the EU, except Russia, which is its biggest neighbour.

The very diversity of these countries challenges the pertinence of the all-encompassing notion of strategic partners. The list of strategic partnerships clearly exposes a degree of diplomatic discretion, dictated by political cycles and convenience; Mexico is included, for example, but Turkey is not. But the lack of a clear definition is not an adequate reason to question the notion's relevance, since it captures an important dimension of contemporary foreign policy.

Instead of entering endless semantic debates, we part from the premise that EU strategic partnerships are structured bilateral relations with (some of) those countries whose choices and priorities will contribute to shaping the global context that impacts the EU. Strategic partnerships encompass not only partnerships of choice, where priorities converge naturally, but also partnerships of necessity, where achieving and sustaining convergence with relevant countries is critically important. Lasting divergence and alienation among these partners would affect EU interests and weaken international cooperation. In practice, most partnerships feature a varying mix of 'choice' and 'necessity'.

- Second, shared values do not necessarily result in common action or identity of purpose. Normative discourse and policy practice appear closely

connected in relations with Japan, Canada and South Korea. Yet while vast normative overlap with the US creates ample common ground in foreign policy, some inconsistent approaches to shared challenges persist due to the different nature and resources of the two parties. Normative proximity with democracies like India, Brazil and South Africa does not necessarily translate into a convergence of policy priorities or mutual expectations, given the very different stages of development amongst the partners and discrepancies in their appreciation of issues of fairness in addressing trade or climate change negotiations, for example.

Conversely, a normative disconnect in relations with Russia and China substantially complicates bilateral relations, yet it does not prevent cooperation on selected important issues such as non-proliferation, Iran or Afghanistan. Nor does it rule out socialisation in multilateral frameworks where high-level bilateral dialogues can help narrow divides, such as with China on climate change.

A broader point is that many EU strategic partners feature multiple identities at once, for example as both developing and emerging countries (India), as status quo and yet revisionist powers (Russia), as part of the global 'South' but also protagonists of the globalised economy (Brazil), and as both proud democracies and guardians of national sovereignty (India and South Africa). This makes distinctions centred on shared or different values an important, but not decisive yardstick to assess perspectives for cooperation. Various other variables come into play too.

- Third, in an international system of growing complexity, strategic partnerships are a flexible and multi-purpose foreign policy instrument in the EU's toolbox. At one level, they are essential to the EU's pursuit of its economic interests since they seek to advance a more open trade system, market access and reciprocity. At another level, they pave the way for cooperation on transnational issues and challenges, from development to state fragility or fostering green technologies. In political terms, strategic partnerships enhance the EU's visibility in regions where its economic footprint is not matched by political engagement, such as in the Asia-Pacific theatre. They may also provide an opportunity for both the EU and its partners to diversify their foreign policy and increase their margin of manoeuvre, as in the case of South Korea, Japan and Canada. This also begs the question of whether the EU should enhance its partnership with other actors too, such as Indonesia and Nigeria.

Strategic partnerships also help the EU connect with countries that may not be major global powers but perform, or will perform, a lynchpin role between different groupings of states or on specific issues. South Korea, Mexico and, increasingly, Brazil are positioned at the interface between the 'South' and the 'North' in elaborating new models for sustainable growth and development cooperation. This makes them valued partners of the Union in exploring ways of bridging traditionally distant agendas. The experience and capacity for political mediation in volatile crises shown by countries like Canada and, sometimes controversially, South Africa offers potential for more engagement with the EU in crisis prevention and management.

Furthermore, although it is proving hard to achieve, these partnerships can provide a stepping stone to narrow differences and develop joint initiatives in multilateral settings where some partners play increasingly important roles. Aside from the three EU strategic partners that are permanent members of the UN Security Council, Japan and Brazil served as non-permanent members for 20 years, India for 14 and Canada for 12. All the EU's strategic partners are members of the G20 and of the Major Economies Forum group

on climate change issues. They are also regular hosts of major multilateral summits, which gives them a special responsibility to shape their agendas and provides the EU with a key entry point to channel its priorities. Suffice it to recall the G20 summits in Toronto and Seoul as well as the conference of the parties to the UNFCCC in Cancun in 2010; the upcoming climate change summit in Durban in 2011; the G20 in Mexico, the Nuclear Security Summit in South Korea and the Rio+20 Conference in Brazil in 2012.

- Fourth, strategic partnerships require constant adjustment to match the priorities of the parties and their changing profile on the global stage. The standard format of strategic partnerships comprises annual summits between leaders, but this risks evolving from an asset to a liability as the gap between grand statements and modest deliverables widens. Summits are useful to steer a course and deliver critical messages to internal and external audiences, but they must gain in substance and their timing must be fine-tuned, with an agenda adapted to different partners.

EU partnerships traditionally based on development cooperation, such as those with India, Brazil and South Africa, have been progressively upgraded to encompass dialogues and initiatives on the full range of transnational challenges. The EU concluded a free trade agreement (FTA) and a framework political agreement with South Korea in 2010; it is pursuing a comprehensive trade and investment agreement with India; it is negotiating a comprehensive economic and trade agreement and a framework political deal with Canada; and it has launched preparations for parallel negotiations on trade and political agreements with Japan. The EU and China started high-level annual economic and strategic dialogues at ministerial level in 2010 and are negotiating a new Partnership and Cooperation Agreement (PCA), although the latter process is slow-moving, as also occurred with the launch of a new PCA with Russia. The Transatlantic Economic Council with the US acquired a new focus in 2010, alongside the EU-US Energy Council (2009), while in 2011 the EU and Brazil have adopted a new, ambitious joint action plan.

The EU's approach to update and upgrade its strategic partnerships appears driven by the somewhat contradictory goal of achieving comprehensiveness yet selecting key priorities, and the imperative to inject real political leadership into otherwise rather technical dealings. Important new initiatives are underway or in the pipeline, but more focus and consistency will be necessary to make these partnerships truly strategic. Notably, much of the current momentum behind deepening bilateral relations, whether with the US, Canada, India or Japan, seems confined to economic and trade matters, while the political and the security dimensions of the EU's strategic partnerships remain at a mainly rhetorical level. The depth of the partnerships across different policy areas therefore seems directly proportional to the credibility, competences and resources of the Union as an international actor, which are uneven.

- Finally, the dark clouds gathering over international politics and economics, alongside domestic turmoil in the EU and in many of its partners, narrow the scope for cooperation. This will test the strategic value of the EU's partnerships, as the Eurozone debt crisis and the negotiations on emerging countries financing Europe's rescue fund strikingly demonstrate. The global economic crisis, with instability now spreading primarily from Europe, and geopolitical turbulence in key regions make these partnerships more important just as the resources and political capital for mutual engagement are shrinking.

Rising tensions in East and South Asia expose the limited strategic projection of the EU beyond its neighbourhood, while the EU was divided on military intervention in Libya. Meanwhile, slow economic growth and acrimonious intra-EU politics over how to address the debt crisis have seriously damaged the image and attractiveness of the Union in the eyes of its partners.

The viability of the Union as a strategic partner may be in doubt, but the leadership of other key actors is also open to question. 'Sound partnerships require solid partners', as this publication points out. From this standpoint, many of the EU's major partners such as Russia, Japan, China and the US

face domestic political, social and economic challenges that may detract from their bilateral and multilateral commitments. It may be less a question of who is rising or declining on the global stage than of which actors are going to be willing and able to take responsibility for the management of interdependence beyond their short-term interests. Effective strategic partnerships that are consistently pursued are one of the instruments that can help avert a world of inadequate, introverted powers.

EU strategic partnerships are a work in progress, just like those that other major global and regional actors seek to establish. However, the EU needs to overcome distinct challenges that stem from its own position as a collective international actor with uneven competences across the policy spectrum. In particular, deepening EU strategic partnerships will require much closer links between the European and the national level. Many EU member states have developed their own bilateral relations, some of which go back decades. This could be a powerful asset to enhance EU influence, but only subject to adequate coordination. Disjointed engagement would undermine the authority of the Union vis-à-vis its partners.

Foreign policy is inevitably driven by events and so EU relations with key partners will not always top the agenda. Nonetheless, a strategic approach to foreign policy requires a consistent pursuit of key interests and objectives over and above shock events requiring immediate attention. To this extent, strategic partnerships are likely to be a permanent feature of the EU's foreign policy, and of those of its main interlocutors.

Giovanni Grevi



JUSTO RUIZ / FLICKR PHOTOS

Brazil

Trade and investment are the most dynamic components of the EU-Brazil strategic partnership, which is rooted in extensive historical and cultural linkages. Brazil is a major destination for European capital: the EU investment stock in the country is more than twice as large as that in China. Brazil is also increasing its investment flows to Europe via Portugal and Spain. In 2008, the EU accounted for 6 percent of FDI from Brazil. The EU is Brazil's main merchandise trade partner, accounting for 22.9 percent of its total imports and exports, while Brazil's share of EU trade in goods is just over 2 percent, making it rank tenth among the EU's trade partners.

Growing economic ties with Brazil contrast with a sense of fatigue in inter-regional trade negotiations. EU-MERCOSUR talks on establishing a free trade agreement, which started in 1999, went dormant for the best part of the last decade before being re-launched in 2009. Yet so far they have made little progress and are unlikely to be concluded soon. The process seems to have reached a deadlock: the EU is reluctant to open up its agricultural market to competitive Brazilian products while Brasilia opposes a substantial reduction of tariffs on manufactures and services.

The strategic partnership, established in 2007 under the Portuguese EU presidency, reflected a shift from an inter-regional EU-MERCOSUR perspective to an upgrading of bilateral relations. It marked a clear recognition by the EU of Brazil's increasing global role. The two parties' bedrock of shared values, including democracy, peace and development, provided an important incentive to deepen bilateral links. Nonetheless, different voting behaviour at the UN on important issues such as the Iranian nuclear dossier and the recent intervention in Libya showed the limits of common ground for global action. The main discrepancy stems

from the Brazilian commitment to the principles of non-interference in internal affairs and its self-image as part of the global South.

Nonetheless, Brazil perceives the EU as a major normative power that shares its interests in building global governance around rules and norms. Moreover, the EU is still seen as an important inspiration for Brazil's own regional integration project articulated through MERCOSUR and UNASUR. That said, supranational integration is not envisaged in the context of MERCOSUR or accepted by Brazil.

The bilateral policy agenda prioritises renewable energy issues, where considerable potential is yet to be fulfilled. The Brazilian ethanol-based biofuel market is particularly attractive to the EU, while Brazil could benefit from EU assistance with alternative technologies (solar energy, wind power) to help satisfy its increasing energy demands. On climate change, the Copenhagen Summit in 2009 evidenced that differences based on a north-south divide still prevail over consensus. Finally, the global economic crisis, both parties' participation in the G20 summits and the recent debates in Washington on the scope for Brazil and other emerging economies to support the euro (for example, by providing additional funds to the IMF), might entail opportunities for closer cooperation on crucial financial issues.

The Joint Action Plan 2012-2014, approved at the last EU-Brazil summit in October 2011, introduced an upgrading of relations towards a comprehensive strategic partnership and the deepening of cooperation on a broad range of bilateral, regional and global issues from the promotion of democracy and human rights to climate change, energy, economics and development. The launch of dialogues on human rights, security and climate change as well as on UN matters is part of the process of deepening relations and resolving differences.

Renewed political momentum behind the bilateral partnership should be invested in achieving tangible progress in a range of priority policy

areas. First, if inter-regional negotiations are not successful, trade relations could be framed in the bilateral context. Despite different trade interests, an agreement between Brazil and the EU would arguably be easier to conclude than an inter-regional one. The latter implies negotiating a common MERCOSUR regime on services, dealing with Argentina's protectionism and, possibly, entering into difficult talks with Venezuela.

Second, both parties should define a concrete road-map for deepening cooperation on renewable energies. Third, they could further explore triangular cooperation on development, particularly in Africa. The European Commission, Germany and the UK have already signed agreements with Brazil in this field and are defining concrete projects. Fourth, by creating a bilateral forum on democracy, human rights and peace to discuss common ground for global action, further progress could be made on the commitment to strengthen value-oriented multilateralism. This initiative would connect to already existing sectoral dialogues on energy, technology and other issues.

It is high time for the EU-Brazil partnership to transcend traditional North-South divides and reach a new strategic level that reflects ongoing power shifts, sustains political convergence and enables joint initiatives on a global scale.

■ DEMOGRAPHY		BRAZIL		EU	
Population (Mio)	2010	195,4		501	
	2025	213,8		519	
	2050	218,5		524	
Median Age	2010	29		40,6	
	2025	35,8		45,4 (2030)	
	2050	45,6		47,9 (2060)	
Dependency Ratio	(Total = Child + Old Age)	Child	Old Age	Child	Old Age
	2010	38	10	34,8	28,4
	2025	26	16	/	/
	2050	23	36	37,5 (2060)	58,5 (2060)

■ ECONOMY		BRAZIL		EU	
GDP	(€) 2010	1.576,8		12.268	
	(€) 2009	1.128,5		11.791	
	(€) 2008	1.096,4		12.495	
GDP growth (%)	2010	7,5		1,7	
	2009	-0,6		-4,2	
	2008	5,2		0,5	
GDP per capita	(€ thousands) 2010	8.159,1		24.400	
	Global rank	53		/	
GDP Projections \$ (2015)		3.103		20.085	
GDP Projections (\$ (2030))	Continuity Scenario	2.440		/	
	Low Growth Scenario	1.630		/	
Foreign Currency Reserves (\$) Summer 2011		344,2		(Eurozone) 213,7	

■ INVESTMENT		BRAZIL		EU	
FDI Flows (2010)	Inflows (\$)	48,4		/	
	Outflows (\$)	11,5		/	
	From the EU (€)	6,2		/	
	To the EU (€)	3,8		/	
FDI Stock	Inward (2010) (\$)	472,5		/	
	Outward (2010) (\$)	181		/	
	From the EU (2009) (€)	132,2		/	
	To the EU (2009) (€)	56,3		/	

■ TRADE		BRAZIL		EU	
Top 5 trading partners (% Goods)	2010	Partner	%	Partner	%
		EU27	22,9	US	14,4
		China	14,9	China	13,9
		US	12,5	Russia	8,6
		Argentina	8,7	Switzerland	6,6
		Japan	3,7	Norway	4,4
Trade as a % of GDP (2009)	Merchandise	18		(Eurozone) 57,1	
	Services	4,7		(Eurozone) 16,9	
Trade with the EU (2010)	Rank	10		/	
	% EU Trade (Goods)	2,2		/	
Goods (€) (2010)	Total Imports	148,5		/	
	Total Export	151,7		/	
	Imports from the EU	31,3		/	
	Exports to the EU	32,3		/	
Services (€) (2010)	Total Imports	45		/	
	Total Exports	22,8		/	
	Imports from the EU	9,9		/	
	Exports to the EU	5,5		/	

■ INNOVATION AND COMPETITIVENESS		BRAZIL		EU	
Expenditure on R&D	GERD (2010) (PPP \$)	18,6		€237 (2008)	
	As a % of GDP	0,9		1,9	
	Researchers per million people (date)	694 (2008)		2.937 (2007)	
Global Competitiveness Index 2011-2012	Rank	53		/	
	Score	4,32		/	
GII 2009-2010 Overall Rankings	Rank	68		/	
	Score	2,97		/	
Human Capacity	Rank	73		/	
	GII Score	3,42		/	
Network Readiness Index	Rank	56		/	

ENERGY, ENVIRONMENT AND RESOURCES

		BRAZIL	EU
Total production of energy	2008 (Mtoe)	228,13	842,7
Total net imports of energy	2008 (Mtoe)	26,97	1.014,2
Total primary energy supply	2008 (Mtoe)	248,53	1.751,29
Main sources of energy imports or export destinations (where indicated, % means share of total imports or exports)		NATURAL GAS IMPORTS 2009: Bolivia 96%	OIL IMPORTS 2008: OPEC 36% Russia 32% Norway 30% Kazakhstan 5% NATURAL GAS IMPORTS 2008: Russia 40% Norway 30% Algeria 15% Nigeria 4%
Renewable energy (2008)	Renewables in TPES (Mtoe)	110,5	148,3 (2009)
	Share of renewables (as a % of TPES)	44,5	8,4
	Renewables scoreboard (2011)	11/49	/
CO2 emissions (2008)	(Mt of CO2)	364,6	4.409, 4
	% of global emissions	1,3	14,7
	% annual growth 2008-2035	2,7	/
	Emissions/GDP (Kg CO2/2000 US\$)	0,43	0,39
	Per capita (t CO2)	1,9	8,8
	Per capita 2025	2,6	/
	Per capita 2035	3,1	/
Production of selected critical raw materials (2008, 2009) as share of world total.		Graphite 7% Niobium 92% Rare earths 1% Tantalum 16%	/

OTHER INDICATORS

		BRAZIL	EU
% of assessed contributions to the UN regular budget (2010)		1,6	40,7
Voting cohesion with the EU at UN General Assembly (2009)	Overall	54	/
	Development and human rights	25	/
	Security	63	/
Development assistance (\$ Mio) 2009		437 (2007)	86.276
IMF voting shares	March 2011	1,3	/
	Post-2008 reform	1,7	/
	Post-2010 reform	2,2	/
Membership of main regional organisations		MERCOSUR, OAS, UNASUR	/
Global Presence Index		58	/

GOVERNANCE AND SOCIETY

		BRAZIL	EU
Human Development Index (2010)	Rank	73	/
Legatum Prosperity Index (Rank)	Overall Score	45	/
	Governance	60	/
	Education	75	/
	Safety and Security	76	/
Corruption Perceptions Index	Rank	69	/
GINI Index	Score (year)	55 (2007)	/

PUBLIC OPINION

		BRAZIL	EU
Gallup worldviews and global reports	Confidence in national government %	51	/
	Approval of country leadership %	68	/
	National economy getting better %	73	/
	Standard of living improving %	72	/
	Global warming quite serious or very serious threat %	95	/
	Approval of UN leadership %	20	/
	Approval of US leadership %	43	/
	Approval of China's leadership %	18	/
	Approval of Russia's leadership %	15	/

MILITARY BALANCE

		BRAZIL	EU
Defence Budget	(\$) (2010)	33,5	€209 (2009)
	As a % of GDP (2010)	1,6	1,67
	As a % of world total	2,1	/
	% change 2001-2010	29,6	29 (1999-2009)
Total Forces	Active	327.710	2.013.000
	Reserve	1.340.000	/
	Paramilitary / Civilian Forces	395.000	/
Military Interventions	Personnel contribution to UN Peace-keeping Operations/Rank (2011)	2.239/13	8.706
	% of assessed contributions to UN peacekeeping budget (2011-12)	0,32	39
	Personnel deployed in non - UN Interventions	0	44.331

Canada

Canada is a middle power with a significant global projection and an international profile broadly predicated on supporting multilateralism and global governance. An active member of NATO, Canada has devised a foreign policy course oscillating between seeking autonomy from and pursuing close cooperation with the US. Relations with the US, which accounts for around two thirds of its external trade, are pivotal for Canada's prosperity and security. Meanwhile, the partnership with the EU is long-established, based on shared values and cultural bonds and mutually beneficial on economic and political grounds. In both respects, however, there lies considerable untapped potential.

Following the 1976 Framework Agreement for Commercial and Economic Cooperation – the first of its kind signed by the then EEC with an industrialised country – the EU and Canada adopted an ambitious partnership agenda in 2004. This prioritised cooperation in advancing international security and effective multilateralism. Over the last few years, the focus has shifted from the political and security domains to trade and investment issues, notably after the launch of negotiations towards a Comprehensive Economic and Trade Agreement (CETA) in 2009.

The EU is Canada's second largest trade partner in goods (10.5 percent of its external trade) and second largest investor, accounting for about 30 percent of the FDI stock in the country. Canada is the fourth largest investor in the EU, which is the main destination of Canada's FDI after the US. However, it ranks eleventh among the EU's trade partners, below South Korea. Mutual investment flows are strong and growing fast. As to trade, a 2008 joint EU-Canada study estimates the annual GDP gains flowing from the envisaged CETA at around €11bn for the EU and



CANUCK85/WIKIPEDIA

€8bn for Canada, with most of the benefits coming from the liberalisation of trade in services. Negotiations on the CETA are making good progress, including on sensitive matters such as public procurement, although some of the toughest discussions remain pending.

The CETA is expected to be concluded in the course of 2012, alongside an upgrading of the overall political framework of the partnership. Negotiations started in late September 2011 on a legally-binding agreement encompassing all aspects of EU-Canada relations. While the EU calls for a sort of codification and consolidation of the principles governing the many domains of bilateral cooperation, Canada seems to favour a more pragmatic approach directed at joining forces on concrete issues.

The dynamism driving economic negotiations cannot be detected in political and security affairs. Bilateral consultations on a range of geographical issues and on human rights, including coordination in the UN context, work well. However, dialogue on strategic issues, such as non-proliferation and counter-terrorism, is less productive, and Canada is reluctant to engage with the EU on Arctic issues.

Canada plays an important role in crisis prevention, crisis management and peace-building at the global level, as well as in disaster response such as in the case of Haiti. Its experience in security sector reform and electoral observation has enabled close cooperation with the EU, not least in the context of the Common Security and Defence Policy (CSDP). Canadian officials have served in EU police missions in Bosnia Herzegovina, the Palestinian Territories and Afghanistan, as well as in the EU rule of law mission in Kosovo. That said, Canada sees NATO as the primary framework for its military engagement abroad not only in Afghanistan but also, more recently, in Libya. Such investment of resources, alongside envisaged cuts to the defence and development budgets on both sides, may leave limited scope for expanding EU-Canada cooperation in crisis management.

Canada's traditional commitment to multilateralism has made it a natural partner for the EU on issues such as banning landmines or establishing the International Criminal Court. Nonetheless, the EU and Canada do not see eye-to-eye on climate change. Rich in unconventional oil and gas reserves, which make it a big energy exporter to the US, Canada has failed to achieve its emissions' reduction targets under the Kyoto Protocol and refuses to undertake new binding commitments under a post-Kyoto regime. The EU-Canada high level dialogues on energy and environment do not compensate for essentially different approaches to the key challenges of climate change.

In sum, the EU and Canada benefit from a mature working partnership upheld by strong value bonds and soon to be boosted by deeper economic ties. However, with the US towering on the radar screen of both parties, neither sees the other as the decisive partner to fulfil respective vital interests. Shared challenges and a common reliance on a stable and open international system suggest that the EU and Canada should better exploit the potential of their strategic partnership on issues such as the reform of multilateral formats and the stabilisation of turbulent regions.

■ DEMOGRAPHY		CANADA		EU	
Population (Mio)	2010	33,9		501	
	2025	38,7		519	
	2050	44,4		524	
Median Age	2010	39,9		40,6	
	2025	42,9		45,4 (2030)	
	2050	45,2		47,9 (2060)	
Dependency Ratio	(Total = Child + Old Age)	Child	Old Age	Child	Old Age
	2010	23	20	34,8	28,4
	2025	25	32	/	/
	2050	26	43	37,5 (2060)	58,5 (2060)

■ ECONOMY		CANADA		EU	
GDP	(€) 2010	1.187,3		12.268	
	(€) 2009	957,9		11.791	
	(€) 2008	951,9		12.495	
GDP growth (%)	2010	3,1		1,7	
	2009	-2,5		-4,2	
	2008	0,5		0,5	
GDP per capita	(€ thousands) 2010	34.860,8		24.400	
	Global rank	12		/	
GDP Projections \$ (2015)		2.000		20.085	
GDP Projections (\$ (2030))	Continuity Scenario	2.083		/	
	Low Growth Scenario	1.759		/	
Foreign Currency Reserves (\$) Summer 2011		50,6		(Eurozone) 213,7	

■ INVESTMENT		CANADA		EU	
FDI Flows (2010)	Inflows (\$)	23,4		/	
	Outflows (\$)	38,5		/	
	From the EU (€)	-4,1		/	
	To the EU (€)	27,7		/	
FDI Stock	Inward (2010) (\$)	561,1		/	
	Outward (2010) (\$)	616,1		/	
	From the EU (2009) (€)	157,5		/	
	To the EU (2009) (€)	119,5		/	

■ TRADE		CANADA		EU	
Top 5 trading partners (% Goods)	2010	Partner	%	Partner	%
		US	62,4	US	14,4
		EU27	10,4	China	13,9
		China	7,4	Russia	8,6
		Mexico	3,5	Switzerland	6,6
Japan	2,9	Norway	4,4		
Trade as a % of GDP (2009)	Merchandise	48,4		(Eurozone) 57,1	
	Services	10,3		(Eurozone) 16,9	
Trade with the EU (2010)	Rank	11		/	
	% EU Trade(Goods)	1,6		/	
Goods (€) (2010)	Total Imports	322,1		/	
	Total Export	291,5		/	
	Imports from the EU	26,6		/	
	Exports to the EU	20,1		/	
Services (€) (2010)	Total Imports	67,4		/	
	Total Exports	50		/	
	Imports from the EU	12,3		/	
		Exports to the EU	9,1		/

■ INNOVATION AND COMPETITIVENESS		CANADA		EU	
Expenditure on R&D	GERD (2010) (PPP \$)	23,7		€237 (2008)	
	As a % of GDP	1,8		1,9	
	Researchers per million people (date)	4.339 (2007)		2.937 (2007)	
Global Competitiveness Index 2011-2012	Rank	12		/	
	Score	5,33		/	
GII 2009-2010 Overall Rankings	Rank	12		/	
	Score	4,55		/	
Human Capacity	Rank	10		/	
	GII Score	4,99		/	
Network Readiness Index	Rank	8		/	

ENERGY, ENVIRONMENT AND RESOURCES

		CANADA	EU
Total production of energy	2008 (Mtoe)	407,38	842,7
Total net imports of energy	2008 (Mtoe)	-144,67	1.014,2
Total primary energy supply	2008 (Mtoe)	266,77	1.751,29
Main sources of energy imports or export destinations (where indicated, % means share of total imports or exports)		OIL IMPORTS 2008: Algeria Norway US OIL EXPORTS 2008: 2,5m b/d to US (100%) NATURAL GAS EXPORTS 2008: 3,6tcf to US (100%)	OIL IMPORTS 2008: OPEC 36% Russia 32% Norway 30% Kazakhstan 5% NATURAL GAS IMPORTS 2008: Russia 40% Norway 30% Algeria 15% Nigeria 4%
Renewable energy (2008)	Renewables in TPES (Mtoe)	45,2	148,3 (2009)
	Share of renewables (as a % of TPES)	16,9	8,4
	Renewables scoreboard (2011)	9/53	/
CO2 emissions (2008)	(Mt of CO2)	550,9	4.409, 4
	% of global emissions	1,8	14,7
	% annual growth 2008-2035	0,5	/
	Emissions/GDP (Kg CO2/2000 US\$)	0,63	0,39
	Per capita (t CO2)	16,5	8,8
	Per capita 2025	14,6	/
	Per capita 2035	14,8	/
Production of selected critical raw materials (2008, 2009) as share of world total.		Cobalt 11% Indium 9% Niobium 7% Tungsten 4%	/

OTHER INDICATORS

		CANADA	EU
% of assessed contributions to the UN regular budget (2010)		3,2	40,7
Voting cohesion with the EU at UN General Assembly (2009)	Overall	78	/
	Development and human rights	81	/
	Security	100	/
Development assistance (\$ Mio) 2009		4.000	86.276
IMF voting shares	March 2011	2,8	/
	Post-2008 reform	2,5	/
	Post-2010 reform	2,2	/
Membership of main regional organisations		NATO, NAFTA, OAS, OECD	/
Global Presence Index		176	/

GOVERNANCE AND SOCIETY

		CANADA	EU
Human Development Index (2010)	Rank	8	/
	Overall Score	7	/
Legatum Prosperity Index (Rank)	Governance	5	/
	Education	12	/
	Safety and Security	16	/
	Corruption Perceptions Index	Rank	6
GINI Index	Score (year)	32,6 (2000)	/

PUBLIC OPINION

		CANADA	EU
Gallup worldviews and global reports	Confidence in national government %	55	/
	Approval of country leadership %	58	/
	National economy getting better %	68	/
	Standard of living improving %	60	/
	Global warming quite serious or very serious threat %	74	/
	Approval of UN leadership %	58	/
	Approval of US leadership %	63	/
	Approval of China's leadership %	25	/
	Approval of Russia's leadership %	29	/

MILITARY BALANCE

		CANADA	EU
Defence Budget	(\$ (2010)	22,8	€209 (2009)
	As a % of GDP (2010)	1,5	1,67
	As a % of world total	1,4	/
	% change 2001-2010	51,8	29 (1999-2009)
Total Forces	Active	65.722	2.013.000
	Reserve	33.967	/
	Paramilitary / Civilian Forces	4.554	/
Military Interventions	Personnel contribution to UN Peace-keeping Operations/Rank (2011)	172/56	8.706
	% of assessed contributions to UN peacekeeping budget (2011-12)	3,21	39
	Personnel deployed in non - UN Interventions	2.871	44.331



LYN GABLEY / FICKR PHOTOS

China

The European Union and China claim that their relationship is of strategic importance. As economic and political ties intensified in the early 2000s, there was huge potential for Europe and China to build a true strategic partnership. But a few years on, there is little evidence of progress. While the idea of a strategic partnership has never been properly defined, it raises the expectation that the two entities will impact the course of international events through their combined influence, shared interests or common values. Yet the EU and China have failed to join forces to confront political challenges and face growing sources of friction in their economic ties, the fundamental link between them.

The potential for strategic cooperation remains very large. First and foremost, China and Europe are economic heavyweights. The sheer size of their markets gives them scope to mobilise plenty of resources for policies beyond their borders. They also share many interests, not least the geopolitical burden of stabilising the turbulent corridors that range from the Bosphorus to the Hindu Kush and from the Caspian Sea to heartland of Africa. Should these regions slide deeper into instability and violence, both China and Europe will pay a price. This should encourage them to streamline policies with regard to governance, development cooperation, peacekeeping, and much more. Europe and China also have a stake in achieving an orderly transition from a unipolar world to a multipolar order, which brings the challenge to reform international institutions, update the rules that steer international politics, and find ways to uphold an open trade regime.

However, a normative disconnect has hampered progress on most fronts. As a developing nation, the priorities of China are different from those of

a largely post-industrial society like Europe. Their expectations, norms and standards may converge over the medium to long-term. For the time being, however, they interpret common challenges in different ways. This puts a brake on cooperation, be it in relation to the responsibility to protect, market access or democracy.

Several institutional constraints also hinder the policy-making process. Beijing is held back by bureaucratic and political infighting, while China thinks Europe has failed to deliver on priorities such as developing a sound monetary union, building more innovative markets and creating a strong European diplomacy. Europe has lost much of the credibility it had built up since the turn of the century. The Chinese increasingly doubt its future as a real international power and a leading economic player. Even Europe's touted welfare system is called into question.

In addition, some serious strains have emerged in economic relations. Talks on expanding economic cooperation in the context of the negotiations for a new Partnership and Cooperation Agreement have not delivered so far. While European companies complain increasingly about their limited access to the Chinese market, Europe's competitive edge is shrinking. Over the last ten years, the overlap in European and Chinese exports increased from 15 to 35 percent, which entails more competition. Chinese exports are ever more sophisticated, with Chinese industries gearing up to secure their share of advanced sectors like aircraft, clean cars and medicines. The Chinese catch-all market could pose a daunting challenge to those member states that try to trade their way out of the financial crisis.

Imbalances in the economic relationship worry decision-makers. Over the last five years, Europe ran an annual goods trade deficit of €170bn, which was by no means compensated for by the €5bn surplus in investment income and the €4bn surplus in trade in services. Furthermore, China did not show much appetite for investing in the European market.

In 2010, its FDI stock in the EU only amounted to €5.7bn. Over the last four years, Chinese firms withdrew more money from Europe than they invested in stocks, bonds, and derivatives. Although Chinese holdings of European reserve assets increased by an estimated €500bn in the last five years, the Chinese government today seems reluctant to invest its foreign exchange reserves in what it perceives as risky bond markets in the eurozone periphery.

Sino-European relations face a challenging road ahead. Governments on both sides should aim to keep ties stable by promoting mutual exchanges and dialogues. The EU and China have already tried to improve communication by setting up a High Level Trade and Economic Dialogue and a Strategic Dialogue. But this will not make a huge difference if the fundamental interests that determine China's and Europe's foreign policy priorities diverge. Moreover, if the EU remains stuck in its economic quagmire, concerns about the balance of power shifting to the East will become more pressing. The alleged EU-China strategic axis will remain elusive as long as both sides fail to address their internal problems. Sound partnerships require solid partners.

■ DEMOGRAPHY		CHINA		EU	
Population (Mio)	2010	1.354,1		501	
	2025	1.453,1		519	
	2050	1.417		524	
Median Age	2010	34,2		40,6	
	2025	38,9		45,4 (2030)	
	2050	45,2		47,9 (2060)	
Dependency Ratio	(Total = Child + Old Age)	Child	Old Age	Child	Old Age
	2010	28	11	34,8	28,4
	2025	26	19	/	/
	2050	25	38	37,5 (2060)	58,5 (2060)

■ ECONOMY		CHINA		EU	
GDP	(€) 2010	4.434,1		12.268	
	(€) 2009	3.519,5		11.791	
	(€) 2008	2.941,4		12.495	
GDP growth (%)	2010	10,3		1,7	
	2009	9,2		-4,2	
	2008	9,6		0,5	
GDP per capita	(€ thousands) 2010	3.305,5		24.400	
	Global rank	94		/	
GDP Projections \$ (2015)		10.062		20.085	
GDP Projections (\$ (2030)	Continuity Scenario	21.479		/	
	Low Growth Scenario	12.510		/	
Foreign Currency Reserves (\$) Summer 2011		3.045		(Eurozone) 213,7	

■ INVESTMENT		CHINA		EU	
FDI Flows (2010)	Inflows (\$)	105,7		/	
	Outflows (\$)	68		/	
	From the EU (€)	4,9		/	
	To the EU (€)	0,9		/	
FDI Stock	Inward (2010) (\$)	578,9		/	
	Outward (2010) (\$)	297,6		/	
	From the EU (2009) (€)	58,3		/	
	To the EU (2009) (€)	5,7		/	

■ TRADE		CHINA		EU	
Top 5 trading partners (% Goods)	2010	Partner	%	Partner	%
		EU27	17	US	14,4
		USA	13,6	China	13,9
		Japan	10,5	Russia	8,6
		HK	8,1	Switzerland	6,6
S.Korea	7,3	Norway	4,4		
Trade as a % of GDP (2009)	Merchandise	44,3		(Eurozone) 57,1	
	Services	5,8		(Eurozone) 16,9	
Trade with the EU (2010)	Rank	2		/	
	% EU Trade (Goods)	13,9		/	
Goods (€) (2010)	Total Imports	966,9		/	
	Total Export	1.172,5		/	
	Imports from the EU	113,1		/	
Services (€) (2010)	Exports to the EU	282		/	
	Total Imports	145		/	
	Total Exports	128,4		/	
Imports from the EU	Imports from the EU	20,2		/	
	Exports to the EU	16,3		/	

■ INNOVATION AND COMPETITIVENESS		CHINA		EU	
Expenditure on R&D	GERD (2010) (PPP \$)	141,4		€237 (2008)	
	As a % of GDP	1,4		1,9	
	Researchers per million people (date)	1.191 (2008)		2.937 (2007)	
Global Competitiveness Index 2011-2012	Rank	26		/	
	Score	4,90		/	
GII 2009-2010 Overall Rankings	Rank	43		/	
	Score	3,32		/	
Human Capacity	Rank	87		/	
	GII Score	3,29		/	
Network Readiness Index	Rank	36		/	

ENERGY, ENVIRONMENT AND RESOURCES

		CHINA	EU
Total production of energy	2008 (Mtoe)	1.993,31	842,7
Total net imports of energy	2008 (Mtoe)	210	1.014,2
Total primary energy supply	2008 (Mtoe)	2.131	1.751,29
Main sources of energy imports or export destinations (where indicated, % means share of total imports or exports)		OIL IMPORTS 2009: Saudi Arabia 21% Angola 16% Iran 11,5% Russia 7,6% Sudan 6%	OIL IMPORTS 2008: OPEC 36% Russia 32% Norway 30% Kazakhstan 5% NATURAL GAS IMPORTS 2008: Russia 40% Norway 30% Algeria 15% Nigeria 4%
Renewable energy (2008)	Renewables in TPES (Mtoe)	260,3	148,3 (2009)
	Share of renewables (as a % of TPES)	12,2	8,4
	Renewables scoreboard (2011)	1/71	/
CO2 emissions (2008)	(Mt of CO2)	6.550	4.409, 4
	% of global emissions	23,3	14,7
	% annual growth 2008-2035	2,6	/
	Emissions/GDP (Kg CO2/2000 US\$)	2,3	0,39
	Per capita (t CO2)	4,9	8,8
	Per capita 2025	7,3	/
	Per capita 2035	9,2	/
Production of selected critical raw materials (2008, 2009) as share of world total.		Antimony 91% Beryllium 14% Fluorspar 59% Germanium 72% Graphite 72%	Indium 58% Magnesium 56% Rare earths 97% Tungsten 78%

OTHER INDICATORS

		CHINA	EU
% of assessed contributions to the UN regular budget (2010)		3,2	40,7
Voting cohesion with the EU at UN General Assembly (2009)	Overall	54	/
	Development and human rights	25	/
	Security	54	/
Development assistance (\$ Mio) 2009		1.800-3.000 (2008)	86.276
IMF voting shares	March 2011	3,6	/
	Post-2008 reform	3,8	/
	Post-2010 reform	6	/
Membership of main regional organisations		SCO, ASEM, East Asia Summit	/
Global Presence Index		291	/

GOVERNANCE AND SOCIETY

		CHINA	EU
Human Development Index (2010)	Rank	89	/
Legatum Prosperity Index (Rank)	Overall Score	58	/
	Governance	64	/
	Education	59	/
	Safety and Security	92	/
Corruption Perceptions Index	Rank	78	/
GINI Index	Score (year)	41,5 (2005)	/

PUBLIC OPINION

		CHINA	EU
Gallup worldviews and global reports	Confidence in national government %	/	/
	Approval of country leadership %	/	/
	National economy getting better %	84	/
	Standard of living improving %	78	/
	Global warming quite serious or very serious threat %	32	/
	Approval of UN leadership %	/	/
	Approval of US leadership %	/	/
	Approval of China's leadership %	/	/
	Approval of Russia's leadership %	/	/

MILITARY BALANCE

		CHINA	EU
Defence Budget	(\$) (2010)	119	€209 (2009)
	As a % of GDP (2010)	2,1	1,67
	As a % of world total	7,3	/
	% change 2001-2010	189	29 (1999-2009)
Total Forces	Active	2.285.000	2.013.000
	Reserve	510.000	/
	Paramilitary / Civilian Forces	660.000	/
Military Interventions	Personnel contribution to UN Peace-keeping Operations/Rank (2011)	1.997/15	8.706
	% of assessed contributions to UN peacekeeping budget (2011-12)	3,94	39
	Personnel deployed in non - UN Interventions	0	44.331



DAISY MATSOND / FLICKR PHOTOS

India

The EU-India partnership has grown from a solely development oriented relationship to a large focus on trade and economics. Perceptions and priorities play an important role. Today the EU seems enamoured by the glitter of India's emergence, no longer seeing it as a poor developing country. India on the other hand, with vast inequalities, one third of the world's poor, and a growing international profile struggles to grasp the sui generis nature of the EU in a Westphalian world. It expects from the EU the same as from other major powers.

With parallel value structures and a total population representing more than a fifth of humanity, the combined weight of India and the EU on global affairs would reverberate deep. But the EU-India strategic partnership, established in 2004, has not yet justified its official label. While the EU and India might appear 'natural partners', relations are in reality complex and slow-moving, with little means of harnessing the far too many fragmented dialogues. Concrete interaction and cooperation in all spheres has not been able to tap into the full potential of the partnership, despite good chemistry between leaders. The focus on summits detracts from a more dynamic day to day working relationship.

The result is that even Annual Summits (since 2000) or high level meetings have not succeeded in pushing forward some of the partnership's major bilateral enterprises like the Free Trade Agreement, the Maritime Agreement, and the Nuclear Fission Agreement. Likewise, progress on various other important issues including the Europol Agreement, the Memorandum of Understanding on Competition, and Science and Technological issues lags behind. Collaboration on bilateral and global security issues, supposedly one of the priorities of the partnership, remains limited, especially on coun-

ter terrorism. On multilateralism, EU-India interaction and coordination within UN bodies is not robust either despite similar positions and complementary roles. While India has participated in 43 out of 64 operations launched by the UN since 1945 and contributes roughly 10 percent of total troops, the EU currently covers 40 percent of the UN peacekeeping budget.

India is the EU's eighth largest trading partner in goods, and the EU, India's number one. Bilateral merchandise trade stands at nearly €70bn, up €20bn in just four years. It is estimated that the EU-India Free Trade Agreement (FTA) would increase the figure to €100bn in just a few years by a dismantling of tariffs by 90%. By targetting FDI towards areas such as infrastructure (both urban and rural), retail/management of cold chain (know how), energy (renewables, efficiency), bio/green technology, vocational training, the FTA would help create a more transparent setting for increased flows and consolidate the liberalising reforms that the Indian government wishes to undertake.

The EU's priorities towards India are trade, security, energy and climate change (renewables) and reinforcing multilateralism. India on the other hand seeks in the EU a partner for sustainable agriculture, development, commerce and a source of technology transfer to maintain its growth.

This mismatch of priorities feeds into a lack of dynamism. Huge opportunities lie ahead, but political hurdles hinder the relationship. India would like EU support for its seat at the UNSC, as well as supply of uranium. The EU would like India to take it more seriously as an actor in the Indian subcontinent, and to hold a mature dialogue on human rights. The EU aims to strengthen the political dimension of the partnership to address common challenges such as Afghanistan, terrorism, climate change, the financial crisis and non-proliferation.

The strategic partnership did succeed in acknowledging the change in global geopolitics, hailing the EU and India's growing interdependence

in both political and economic spheres. Although it has not delivered much in terms of concrete results, the EU-India partnership can become truly strategic with greater momentum. Political will and revitalizing the bilateral component, which is the mainstay of the relationship and the building block for broader engagement at the regional and multilateral level, would deliver much needed impetus. Concluding the FTA would be a critical factor to strengthen the partnership and pave the way for deeper cooperation across the board.

Frequent high level bilateral visits throughout the year should be prioritised. Businesses have a key role to play too. Major Indian firms should be a driving force behind EU-India relations. This would also enable the EU and India to address and overcome economic disparities, political deadlock and bureaucratic bottlenecks. The EU-India relationship needs a sleeker and more dynamic framework for collaboration. The first step would be to jointly agree on a concrete, manageable list of mutually beneficial priorities and a healthy day-to-day working relationship.

■ DEMOGRAPHY		INDIA		EU	
Population (Mio)	2010	1.214,5		501	
	2025	1.431,3		519	
	2050	1.613,8		524	
Median Age	2010	25		40,6	
	2025	29,9	45,4 (2030)		
	2050	38,4	47,9 (2060)		
Dependency Ratio	(Total = Child + Old Age)	Child	Old Age	Child	Old Age
	2010	48	8	34,8	28,4
	2025	36	11	/	/
	2050	27	20	37,5 (2060)	58,5 (2060)

■ ECONOMY		INDIA		EU	
GDP	(€) 2010	1.160,1	12.268		
	(€) 2009	886,8	11.791		
	(€) 2008	827,8	12.495		
GDP growth (%)	2010	10,4	1,7		
	2009	6,8	-4,2		
	2008	5,1	0,5		
GDP per capita	(€ thousands) 2010	954,1	24.400		
	Global rank	138	/		
GDP Projections \$ (2015)		2.516,3	20.085		
GDP Projections (\$ (2030)	Continuity Scenario	5.328	/		
	Low Growth Scenario	3.106	/		
Foreign Currency Reserves (\$) Summer 2011		286,1	(Eurozone) 213,7		

■ INVESTMENT		INDIA		EU	
FDI Flows (2010)	Inflows (\$)	26,6	/		
	Outflows (\$)	14,6	/		
	From the EU (€)	3	/		
	To the EU (€)	0,6	/		
FDI Stock	Inward (2010) (\$)	198	/		
	Outward (2010) (\$)	92,4	/		
	From the EU (2009) (€)	27,2	/		
	To the EU (2009) (€)	5,5	/		

■ TRADE		INDIA		EU	
Top 5 trading partners (% Goods)	2010	Partner	%	Partner	%
		EU27	15,6	US	14,4
		China	11,4	China	13,9
		US	8,8	Russia	8,6
		UAE	8,4	Switzerland	6,6
Saudi Arabia	4,3	Norway	4,4		
Trade as a % of GDP (2009)	Merchandise	29,9		(Eurozone) 57,1	
	Services	12,5		(Eurozone) 16,9	
Trade with the EU (2010)	Rank	8		/	
	% EU Trade (Goods)	2,4		/	
Goods (€) (2010)	Total Imports	255,3		/	
	Total Export	155,1		/	
	Imports from the EU	34,8		/	
	Exports to the EU	33,1		/	
Services (€) (2010)	Total Imports	88,2		/	
	Total Exports	82,6		/	
	Imports from the EU	9,8		/	
		Exports to the EU		8,1 /	

■ INNOVATION AND COMPETITIVENESS		INDIA		EU	
Expenditure on R&D	GERD (2010) (PPP \$)	33,3	€237 (2008)		
	As a % of GDP	0,9	1,9		
	Researchers per million people (date)	137 (2005)	2.937 (2007)		
Global Competitiveness Index 2011-2012	Rank	56	/		
	Score	4,30	/		
GII 2009-2010 Overall Rankings	Rank	56	/		
	Score	3,1	/		
Human Capacity	Rank	38	/		
	GII Score	4,03	/		
Network Readiness Index	Rank	48	/		

ENERGY, ENVIRONMENT AND RESOURCES

		INDIA	EU
Total production of energy	2008 (Mtoe)	468,31	842,7
Total net imports of energy	2008 (Mtoe)	157,89	1.014,2
Total primary energy supply	2008 (Mtoe)	620,97	1.751,29
Main sources of energy imports or export destinations (where indicated, % means share of total imports or exports)	OIL IMPORTS 2009:	OIL IMPORTS 2008:	OIL IMPORTS 2008:
	Saudi Arabia 18%	OPEC 36%	OPEC 36%
	Iran 16%	Russia 32%	Russia 32%
	Kuwait 10%	Norway 30%	Norway 30%
	Nigeria 8%	Kazakhstan 5%	Kazakhstan 5%
Angola 5%	NATURAL GAS IMPORTS 2008:	NATURAL GAS IMPORTS 2008:	
LNG IMPORTS 2008:	Russia 40%	Russia 40%	
Qatar 75%	Norway 30%	Norway 30%	
	Algeria 15%	Algeria 15%	
	Nigeria 4%	Nigeria 4%	
Renewable energy (2008)	Renewables in TPES (Mtoe)	174,7	148,3 (2009)
	Share of renewables (as a % of TPES)	28,1	8,4
	Renewables scoreboard (2011)	4/62	/
CO2 emissions (2008)	(Mt of CO2)	1.4276	4.409, 4
	% of global emissions	5,8	14,7
	% annual growth 2008-2035	2,7	/
	Emissions/GDP (Kg CO2/2000 US\$)	1,73	0,39
	Per capita (t CO2)	1,2	8,8
	Per capita 2025	1,3	/
	Per capita 2035	1,5	/
Production of selected critical raw materials (2008, 2009) as share of world total.	Graphite 13% Rare earths 2%	/	/

OTHER INDICATORS

		INDIA	EU
% of assessed contributions to the UN regular budget (2010)		0,53	40,7
Voting cohesion with the EU at UN General Assembly (2009)	Overall	43	/
	Development and human rights	25	/
	Security	27	/
Development assistance (\$ Mio) 2009		610	86.276
IMF voting shares	March 2011	1,8	/
	Post-2008 reform	2,3	/
	Post-2010 reform	2,6	/
Membership of main regional organisations	SAARC, ASEM, East Asia Summit	/	/
Global Presence Index		89,5	/

GOVERNANCE AND SOCIETY

		INDIA	EU
Human Development Index (2010)	Rank	121	/
Legatum Prosperity Index (Rank)	Overall Score	88	/
	Governance	41	/
	Education	89	/
	Safety and Security	78	/
Corruption Perceptions Index	Rank	87	/
GINI Index	Score (year)	36,8 (2005)	/

PUBLIC OPINION

		INDIA	EU
Gallup worldviews and global reports	Confidence in national government %	67	/
	Approval of country leadership %	57	/
	National economy getting better %	40	/
	Standard of living improving %	44	/
	Global warming quite serious or very serious threat %	83	/
	Approval of UN leadership %	18	/
	Approval of US leadership %	18	/
	Approval of China's leadership %	8	/
	Approval of Russia's leadership %	11	/

MILITARY BALANCE

		INDIA	EU
Defence Budget	(\$ (2010)	41,3	€209 (2009)
	As a % of GDP (2010)	2,7	1,67
	As a % of world total	2,5	/
	% change 2001-2010	54,3	29 (1999-2009)
Total Forces	Active	1.325.000	2.013.000
	Reserve	1.155.000	/
	Paramilitary / Civilian Forces	2.288.407	/
Military Interventions	Personnel contribution to UN Peace-keeping Operations/Rank (2011)	8.423/3	8.706
	% of assessed contributions to UN peacekeeping budget (2011-12)	0,1	39
	Personnel deployed in non - UN Interventions	0	44.331



MERIJN HOEK / FLICKR PHOTOS

Japan

The EU and Japan are often described as natural strategic partners given their shared commitment to fundamental values and principles. These include not only democracy and human rights but also human security and sustainable development. They also share an identity as civilian powers that rely on mainly economic instruments to leverage international influence and seek to project soft power. This sets the stage for converging foreign policy approaches and priorities.

Yet the relative economic decline of Europe and Japan, domestic political instability, and geopolitical turbulence in their respective neighbourhoods put the partnership at a crossroads. Enhanced economic links and security cooperation would serve the interests of both parties. But it is questionable whether the two partners have the ambition and the ability to make a tangible difference to their strategic priorities and concerns in a more competitive environment. The paradox underlying the EU-Japan relationship is that the very affinity between the two parties may be sapping the strength of their partnership.

The EU and Japan have held bilateral summits for twenty years and agreed an extensive Joint Action Plan in 2001. The latter was meant to take bilateral relations to a new level, departing from the traditional trade and economic focus to deepen cooperation across the board, including on political and security affairs. Ten years on, most feel the ambition of the Action Plan has not been fulfilled, leading to uncertainty as to what to replace it with following its expiry. Instead of adopting a new Action Plan, leaders at the bilateral summit in May 2011 agreed to start exploring the scope for parallel negotiations towards a comprehensive free trade agreement and a legally-binding, cross-sectoral political agreement.

The economic partnership is strong, despite controversy over some trade issues. The EU is Japan's third largest trade partner in goods, and Japan the Union's sixth. For its part, Japan has deep economic roots in the Pacific region, with four of its five largest trade partners located there (China, the US, South Korea and Australia). Among the EU's strategic partners, Japan's investment stock in Europe is second only to that of the US, and much larger than that of the BRICS combined. Japanese demands to launch free trade negotiations have met some reluctance on the EU side, due to complaints that non-tariff barriers complicate market access for European firms in Japan. However, the 2011 summit emphasised the comprehensive nature of the envisaged trade deal, which should address tariff and non-tariff barriers as well as procurement and investment issues.

Beyond economics, the partners share a comprehensive approach to security issues, aimed at addressing the root causes of regional crises and state fragility. The EU and Japan have taken joint or coordinated initiatives in post-conflict theatres such as Afghanistan and, more recently, in counter-piracy operations off the coast of Somalia. They have also set up a development policy dialogue focused on better aid coordination in Africa and South Asia. Yet positive cooperation on distinct issues does not generally add up to an overarching strategic engagement on the most pressing concerns of either partner.

On the one side, an increasingly inward-looking Europe is not a major geopolitical player in East Asia. At a time of profound shifts in the regional balance of power, this erodes its strategic relevance in the eyes of Japan. The EU focuses on the economic challenges and opportunities posed by China and appears less concerned with the geopolitical implications of its momentous rise. On the other side, Japan feels directly exposed to mounting regional uncertainties and tensions. It regards its close alliance with the US, in addition to active regional diplomacy in East Asia, as the best insurance policy to face not only a more assertive China but also the threat posed by North Korea's nuclear programme.

The partnership between the EU and Japan needs to adjust to a regional and global context that challenges their traditional leadership. Cooperation in multilateral fora, such as their co-sponsorship of a UN General Assembly resolution on the human rights situation in North Korea in 2008, is a promising springboard for further joint engagement. The overall voting cohesion between the EU and Japan at the UN General Assembly is the highest among the EU's strategic partners. Closer EU-Japan cooperation on regional and transnational security issues would offer more visibility and influence to both actors. Nonetheless, convergence on issues such as arms control and non-proliferation, as well as climate change, development and foreign aid, needs to be converted into more tangible initiatives in practice.

In the aftermath of the disastrous earthquake, tsunami and nuclear accident that hit Japan in March 2011, three priority areas for deeper cooperation at the bilateral level were outlined at the latest summit: nuclear safety; energy cooperation, including resource efficiency and combating climate change; and humanitarian assistance, emergency relief and disaster preparedness and prevention. This agenda could bring significant added value to the two partners if they show real commitment by implementing concrete initiatives.

The EU and Japan are the first and fourth largest economies in the world, respectively, yet both currently punch below their weight in international affairs. In the medium-term, the real test of the strategic nature of their partnership will be whether it can boost the global influence of both parties.

■ DEMOGRAPHY		JAPAN		EU	
Population (Mio)	2010	127		501	
	2025	120,8		519	
	2050	101,7		524	
Median Age	2010	44,7		40,6	
	2025	50,6		45,4 (2030)	
	2050	55,1		47,9 (2060)	
Dependency Ratio	(Total = Child + Old Age)	Child	Old Age	Child	Old Age
	2010	21	35	34,8	28,4
	2025	19	50	/	/
	2050	22	74	37,5 (2060)	58,5 (2060)

■ ECONOMY		JAPAN		EU	
GDP	(€) 2010	4.117,7		12.268	
	(€) 2009	3.634,1		11.791	
	(€) 2008	3.337,8		12.495	
GDP growth (%)	2010	3,9		1,7	
	2009	-6,3		-4,2	
	2008	-1,2		0,5	
GDP per capita	(€ thousands) 2010	32.300,2		24.400	
	Global rank	16		/	
GDP Projections \$ (2015)		6.379,6		20.085	
GDP Projections (\$ (2030)	Continuity Scenario	5.786		/	
	Low Growth Scenario	5.136		/	
Foreign Currency Reserves (\$) Summer 2011		1.135,2		(Eurozone) 213,7	

■ INVESTMENT		JAPAN		EU	
FDI Flows (2010)	Inflows (\$)	-1,2		/	
	Outflows (\$)	56,2		/	
	From the EU (€)	-4,1		/	
	To the EU (€)	1,5		/	
FDI Stock	Inward (2010) (\$)	214,8		/	
	Outward (2010) (\$)	831		/	
	From the EU (2009) (€)	84,0		/	
	To the EU (2009) (€)	135,3		/	

■ TRADE		JAPAN		EU	
Top 5 trading partners (% Goods)	2010	Partner	%	Partner	%
		China	21,8	US	14,4
		US	13,7	China	13,9
		EU27	11,1	Russia	8,6
		S.Korea	6,6	Switzerland	6,6
Australia	4,4	Norway	4,4		
Trade as a % of GDP (2009)	Merchandise	22,3		(Eurozone) 57,1	
	Services	5,5		(Eurozone) 16,9	
Trade with the EU (2010)	Rank	6		/	
	% EU Trade (Goods)	3,8		/	
Goods (€) (2010)	Total Imports	506,8		/	
	Total Export	542		/	
	Imports from the EU	473		/	
	Exports to the EU	64,9		/	
Services (€) (2010)	Total Imports	117,1		/	
	Total Exports	103,8		/	
	Imports from the EU	18,3		/	
		Exports to the EU		14,5 /	

■ INNOVATION AND COMPETITIVENESS		JAPAN		EU	
Expenditure on R&D	GERD (2010) (PPP \$)	142		€237 (2008)	
	As a % of GDP	3,3		1,9	
	Researchers per million people (date)	5.159 (2008)		2.937 (2007)	
Global Competitiveness Index 2011-2012	Rank	9		/	
	Score	5,40		/	
GII 2009-2010 Overall Rankings	Rank	13		/	
	Score	4,5		/	
Human Capacity	Rank	17		/	
	GII Score	4,62		/	
Network Readiness Index	Rank	19		/	

ENERGY, ENVIRONMENT AND RESOURCES

		JAPAN	EU
Total production of energy	2008 (Mtoe)	88,66	842,7
Total net imports of energy	2008 (Mtoe)	418,89	1.014,2
Total primary energy supply	2008 (Mtoe)	495,84	1.751,29
Main sources of energy imports or export destinations (where indicated, % means share of total imports or exports)	OIL IMPORTS 2009: Saudi Arabia 27% UAE 20% Qatar 12% Iran 9% Kuwait 9%	OIL IMPORTS 2008: OPEC 36% Russia 32% Norway 30% Kazakhstan 5% NATURAL GAS IMPORTS 2008: Russia 40% Norway 30% Algeria 15% Nigeria 4%	
	LNG IMPORTS 2010: Malaysia 19,9% Australia 19% Indonesia 18,3% Qatar 10,9%		
Renewable energy (2008)	Renewables in TPES (Mtoe)	16,1	148,3 (2009)
	Share of renewables (as a % of TPES)	3,2	8,4
	Renewables scoreboard (2011)	19/44	/
CO2 emissions (2008)	(Mt of CO2)	1.151,1	4.409, 4
	% of global emissions	4	14,7
	% annual growth 2008-2035	-0,4	/
	Emissions/GDP (Kg CO2/2000 US\$)	0,22	0,39
	Per capita (t CO2)	9	8,8
	Per capita 2025	9,1	/
	Per capita 2035	9,1	/
Production of selected critical raw materials (2008, 2009) as share of world total.		Indium 11%	/

OTHER INDICATORS

		JAPAN	EU
% of assessed contributions to the UN regular budget (2010)		12,5	40,7
Voting cohesion with the EU at UN General Assembly (2009)	Overall	89	/
	Development and human rights	87	/
	Security	/	/
Development assistance (\$ Mio) 2009		9.469	86.276
IMF voting shares	March 2011	6	/
	Post-2008 reform	6,2	/
	Post-2010 reform	6,1	/
Membership of main regional organisations		ASEM, East Asia Summit, OECD	/
Global Presence Index		273	/

GOVERNANCE AND SOCIETY

		JAPAN	EU
Human Development Index (2010)	Rank	11	/
Legatum Prosperity Index (Rank)	Overall Score	18	/
	Governance	20	/
	Education	24	/
	Safety and Security	11	/
Corruption Perceptions Index	Rank	17	/
GINI Index	Score (year)	31,9 (1998)	/

PUBLIC OPINION

		JAPAN	EU
Gallup worldviews and global reports	Confidence in national government %	27	/
	Approval of country leadership %	34	/
	National economy getting better %	28	/
	Standard of living improving %	23	/
	Global warming quite serious or very serious threat %	77	/
	Approval of UN leadership %	46	/
	Approval of US leadership %	51	/
	Approval of China's leadership %	29	/
	Approval of Russia's leadership %	21	/

MILITARY BALANCE

		JAPAN	EU
Defence Budget	(\$) (2010)	54,5	€209 (2009)
	As a % of GDP (2010)	1	1,67
	As a % of world total	3,3	/
	% change 2001-2010	-1,7	29 (1999-2009)
Total Forces	Active	230.300	2.013.000
	Reserve	41.800	/
	Paramilitary / Civilian Forces	12.250	/
Military Interventions	Personnel contribution to UN Peace- keeping Operations/Rank (2011)	257/47	8.706
	% of assessed contributions to UN peacekeeping budget (2011-12)	12,53	39
	Personnel deployed in non - UN Interventions	0	44.331



EMMANUEL ALANIS / FLICKR PHOTOS

Mexico

Mexico is a privileged partner of the EU in Latin America. The parties signed a free trade agreement in 1997 and Mexico has been singled out as a strategic partner of the EU since 2008. The EU considers Mexico, a member of the OECD, a like-minded country given its commitment to shared values. Beyond EU channels, Mexico shares deep bilateral relations with its closest European partner, Spain, and is the most active Latin American country in the Iberoamerican Community of Nations located in Madrid. Cultural and political ties are the cornerstone of this relationship. Spain's special links with Mexico have been a major factor behind the upgrading of its partnership with the EU, and the first bilateral summit in 2002 took place in Madrid.

Mexico was also the first Latin American partner that signed a free trade agreement with the EU in 1997. At the time, Mexico's transition to democracy had not yet been concluded and the democracy and human rights clause was a major obstacle in negotiations. The signature, in 1994, of the North American Free Trade Area (NAFTA) and the EU's view of Mexico's new role as a 'cultural, political and physical bridge' between Latin America and North America provided major political incentives for deepening relations between Mexico and the EU.

Trade is not a major issue on the bilateral agenda, since up to 90 percent of Mexico's exchanges of goods are with the United States. With a share of 1.1 percent of its external trade in goods, Mexico is not a top trade partner of the EU which, in turn, accounts for about 8 percent of Mexican exports and imports. That said, until the crisis in 2008, the free trade agreement led to an average 13 percent annual increment of trade flows. Moreover, the EU is Mexico's second source of FDI.



Affinities and commitments between Mexico and the EU are particularly strong on development assistance, a shared objective. Mexico no longer receives aid from the EU but is a new donor and OECD member. It has a long history of regional initiatives in Central America, which is also a priority region for the EU's development assistance to Latin America. Triangular cooperation in Central America is already under way. In 2010, both parties agreed to define a common framework for cooperation and to join efforts in two special projects, namely the integrated programme on security and justice, and the integration and development project for Central America. Apart from shared regional interests, Mexico and the EU have also pushed forward the global agenda on development, particularly the Millennium Development Goals and the priorities of the 2002 UN conference in Monterrey on financing for development.

Mexico is strongly committed to multilateral cooperation and is the largest Latin American contributor to the UN budget. Its positions on global development, trade, peace and security issues or climate change are closer to those of the EU than to the approach of the so-called BRICS group including Brazil. In fact, the partnership between the EU and Mexico harbours potential to foster global cooperation by taking advantage of the country's role as a bridge between traditional and emerging powers.

Given the high crime rate attributed to the narco-cartels operating in Mexico, public security is an upcoming and highly sensitive issue on the agenda. The EU's cautious and hesitant stance on Mexico's most serious domestic problem is due to, among other issues, a different approach from that of the US. The American focus on military assistance against drug-trafficking has raised reservations in Brussels, which has resulted in a lack of coordination. Besides, since Mexico is not a beneficiary of the EU's development assistance, the EU needs to identify or devise new instruments to address public security in the country. To

start with, the strategic partnership foresees the opening of a special dialogue on political and security issues.

A further field to explore is financial and economic cooperation. Mexico's G20 presidency in 2012 may open new opportunities to seek common ground for tackling the financial crisis that slashed both partners' growth prospects. France and Spain are particularly interested in deepening financial coordination with Mexico. However, prospects for cooperation will strongly depend on the results of upcoming elections in Mexico in July 2012.

■ DEMOGRAPHY		MEXICO		EU	
Population (Mio)	2010	110,6		501	
	2025	123,4		519	
	2050	129		524	
Median Age	2010	27,6		40,6	
	2025	34	45,4 (2030)		
	2050	43,9	47,9 (2060)		
Dependency Ratio	(Total = Child + Old Age)	Child	Old Age	Child	Old Age
	2010	43	10	34,8	28,4
	2025	31	15	/	/
	2050	26	36	37,5 (2060)	58,5 (2060)

■ ECONOMY		MEXICO		EU	
GDP	(€) 2010	783,8	12.268		
	(€) 2009	627,2	11.791		
	(€) 2008	738,3	12.495		
GDP growth (%)	2010	5,5	1,7		
	2009	-6,5	-4,2		
	2008	1,5	0,5		
GDP per capita	(€ thousands) 2010	7.215,8	24.400		
	Global rank	61	/		
GDP Projections \$ (2015)		1.427,5	20.085		
GDP Projections (\$ (2030)	Continuity Scenario	2.397	/		
	Low Growth Scenario	1.585	/		
Foreign Currency Reserves (\$) Summer 2011		122,6	(Eurozone) 213,7		

■ INVESTMENT		MEXICO		EU	
FDI Flows (2010)	Inflows (\$)	18,6	/		
	Outflows (\$)	14,3	/		
	From the EU (€)	3,8	/		
	To the EU (€)	2,9	/		
FDI Stock	Inward (2010) (\$)	3272	/		
	Outward (2010) (\$)	66,1	/		
	From the EU (2009) (€)	58,3	/		
	To the EU (2009) (€)	14,4	/		

■ TRADE		MEXICO		EU	
Top 5 trading partners (% Goods)	2010	Partner	%	Partner	%
		US	68,3	US	14,4
		EU27	8	China	13,9
		Canada	4,7	Russia	8,6
		China	4,5	Switzerland	6,6
Japan	2,4	Norway	4,4		
Trade as a % of GDP (2009)	Merchandise	53,9		(Eurozone) 57,1	
	Services	4,5		(Eurozone) 16,9	
Trade with the EU (2010)	Rank	20		/	
	% EU Trade (Goods)	1,2		/	
Goods (€) (2010)	Total Imports	218		/	
	Total Export	214,1		/	
	Imports from the EU	21,4		/	
	Exports to the EU	13,1		/	
Services (€) (2010)	Total Imports	17,4		/	
	Total Exports	12,2		/	
	Imports from the EU	4,1		/	
		Exports to the EU		2,6 /	

■ INNOVATION AND COMPETITIVENESS		MEXICO		EU	
Expenditure on R&D	GERD (PPP \$) (2010)	6	€237 (2008)		
	As a % of GDP	0,4	1,9		
	Researchers per million people (date)	353 (2007)	2.937 (2007)		
Global Competitiveness Index 2011-2012	Rank	58	/		
	Score	4,29	/		
GII 2009-2010 Overall Rankings	Rank	69	/		
	Score	2,96	/		
Human Capacity	Rank	80	/		
	GII Score	3,36	/		
Network Readiness Index	Rank	78	/		



ENERGY, ENVIRONMENT AND RESOURCES

		MEXICO	EU
Total production of energy	2008 (Mtoe)	233,60	842,7
Total net imports of energy	2008 (Mtoe)	-47,21	1.014,2
Total primary energy supply	2008 (Mtoe)	180,61	1.751,29
Main sources of energy imports or export destinations (where indicated, % means share of total imports or exports)		OIL EXPORTS 2009: 1,2m b/d to US (100%) NATURAL GAS IMPORTS 2009: US 75%	OIL IMPORTS 2008: OPEC 36% Russia 32% Norway 30% Kazakhstan 5% NATURAL GAS IMPORTS 2008: Russia 40% Norway 30% Algeria 15% Nigeria 4%
Renewable energy (2008)	Renewables in TPES (Mtoe)	17,8	148,3 (2009)
	Share of renewables (as a % of TPES)	9,9	8,4
	Renewables scoreboard (2011)	23/42	/
CO2 emissions (2008)	(Mt of CO2)	408,3	4.409, 4
	% of global emissions	1,6	14,7
	% annual growth 2008-2035	1,7	/
	Emissions/GDP (Kg CO2/2000 US\$)	0,53	0,39
	Per capita (t CO2)	3,8	8,8
	Per capita 2025	4,5	/
	Per capita 2035	5,5	/
Production of selected critical raw materials (2008, 2009) as share of world total.		Fluorspar 18%	/

OTHER INDICATORS

		MEXICO	EU
% of assessed contributions to the UN regular budget (2010)		2,3	40,7
Voting cohesion with the EU at UN General Assembly (2009)	Overall	65	/
	Development and human rights	56	/
	Security	63	/
Development assistance (\$ Mio) 2009		/	86.276
IMF voting shares	March 2011	1,4	/
	Post-2008 reform	1,4	/
	Post-2010 reform	1,8	/
Membership of main regional organisations		NAFTA, OAS, OECD	/
Global Presence Index		71,5	/

GOVERNANCE AND SOCIETY

		MEXICO	EU
Human Development Index (2010)	Rank	56	/
Legatum Prosperity Index (Rank)	Overall Score	53	/
	Governance	66	/
	Education	69	/
	Safety and Security	79	/
Corruption Perceptions Index	Rank	98	/
GINI Index	Score (year)	48,1 (2006)	/

PUBLIC OPINION

		MEXICO	EU
Gallup worldviews and global reports	Confidence in national government %	37	/
	Approval of country leadership %	35	/
	National economy getting better %	25	/
	Standard of living improving %	47	/
	Global warming quite serious or very serious threat %	94	/
	Approval of UN leadership %	/	/
	Approval of US leadership %	40	/
	Approval of China's leadership %	31	/
	Approval of Russia's leadership %	23	/

MILITARY BALANCE

		MEXICO	EU
Defence Budget	(\$) (2010)	5,4	€209 (2009)
	As a % of GDP (2010)	0,5	1,67
	As a % of world total	0,33	/
	% change 2001-2010	39	29 (1999-2009)
Total Forces	Active	267.506	2.013.000
	Reserve	39.899	/
	Paramilitary / Civilian Forces	36.500	/
Military Interventions	Personnel contribution to UN Peace-keeping Operations/Rank (2011)	/	8.706
	% of assessed contributions to UN peacekeeping budget (2011-12)	0,47	39
	Personnel deployed in non - UN Interventions	0	44.331



MISPAHN / FLICKR PHOTOS

Russia

Russia is the only EU ‘strategic’ partner which is an immediate neighbour of the Union. This proximity largely defines the character of the partnership. The EU-Russia relationship has elements of both cooperation and competition, with the latter prevailing when it comes to the common neighbourhood. Different worldviews and a mismatch of mutual perceptions weaken the basic trust that should underpin a truly strategic partnership.

The EU’s partnership with Russia dates back to the early 1990s. Russia was the first post-soviet country with which the EU signed a Partnership and Cooperation Agreement (PCA) in 1994. Since 2003, cooperation has been carried out through the so-called ‘four common spaces’ covering economics, internal affairs, external security and research, culture and education. Since June 2008, the EU and Russia have been negotiating a new agreement to replace the expired PCA and upgrade their partnership. The EU seeks a comprehensive and legally-binding agreement covering all topics important for both sides, including energy security, trade and democratic values. Russia, on the contrary, prefers a loose framework without binding commitments that would be complemented by sector agreements on jointly agreed priorities.

The EU has sought to build this partnership on the principles of democracy and human rights and to anchor ‘a stable, democratic and prosperous Russia to a united Europe free of new dividing lines’. For its part, Russia devised the concept of ‘sovereign democracy’ that stresses the principle of non-intervention in internal affairs and aims at reasserting its role as a global power.

In June 2010, the EU and Russia kicked off a Partnership for Modernisation to promote reform, growth and competitiveness. Russia is interested in modernising its economy, which is largely based on exports of raw mate-



rials, and seeks European investment and technologies. The country ranks low in the Global Competitiveness Index (66th place), lagging behind all EU strategic partners. The EU defines modernisation more broadly, including the reform of the political system and of state-society relations. Russia occupies the 101st position on the governance indicator in the Legatum Prosperity index and the 154th on the Transparency International Corruption Perceptions Index.

The EU is Russia's largest trading partner, accounting for almost half of Russia's foreign trade. Energy accounts for the bulk of Russia's exports to Europe: 80 percent of Russia's oil exports, 55 percent of its gas exports and 50 percent of its coal exports go to the EU. About 40 percent of the EU's natural gas and 32 percent of oil imports come from Russia. Russia is the EU's third largest trading partner in goods, accounting for over 8 percent of its external trade and the EU is a key investor in Russia's economy. While the EU aims to liberalise trade with Russia and promote a more favourable business climate there, an EU-Russia free trade area is unlikely to be achieved unless Russia joins the WTO.

The main problems in the energy field arise from Russia's tendency to use energy as a foreign policy tool, which resulted in cuts of gas supply to Europe in 2006 and 2009. Russia also seeks to develop energy relations with EU member states separately rather than with the EU as a bloc. This allows Russia to obtain bigger benefits through long-term trade deals and the expansion of Russian capital into the European energy sector. The EU has (unsuccessfully) attempted to make Russia play by common rules in the energy sector, through Russia's alignment with the Energy Charter Treaty. Currently, the EU focuses on the integration of its energy market, which is seen as strengthening the EU position vis-à-vis Russia, and on the development of the Southern Corridor to bring gas from the Caspian Basin and Central Asia to Europe.

Through extensive economic, military and cultural links, Russia exerts a considerable influence on the Eastern neighbourhood of the Union, where the EU seeks to promote political and economic reform. Cooperation with

Russia is crucial, though rather unsuccessful, in the solution of unresolved conflicts in the region. In fact, alongside the contentious debate on NATO enlargement, the common neighbourhood has been a major hurdle on the EU-Russia agenda, with the Russia-Georgia conflict in 2008 making matters worse. Russia's subsequent proposal of a new European security treaty in 2008 has not found much support across the EU and has been more or less sidelined following the 'reset' of US-Russia relations in 2009.

Finally, Russia has an impact on global affairs mainly due to its military power and natural resource endowments as well as through its membership of a number of international organisations and top clubs such as the UN Security Council and the G20. Russia is among the top ten largest world economies, possesses half of the world's nuclear forces and is the second largest arms exporter in the world. EU-Russia cooperation on such issues as the Iran nuclear dossier and the stabilisation of Afghanistan is particularly important.

The lack of a coherent EU policy towards Russia diminishes the weight of the Union in this partnership. As the then EU trade commissioner Peter Mandelson stated in 2007, 'No other country reveals our differences as Russia does'. While European cohesion towards Russia has been improving, differences between EU member states continue to weaken the EU position and its credibility in the Eastern neighbourhood. A key challenge ahead is for the EU to build an EU-wide partnership with Russia rather than bilateral deals which reinforce Russia, but affect the Union's status as a strategic partner. At a basic level, the EU and Russia need to build mutual trust – the free visa regime would be a good starting point. This will require greater cohesion in Europe and tangible steps to reform the economy and improve the rule of law on the Russian side, which do not appear to be forthcoming.

■ DEMOGRAPHY		RUSSIA		EU	
Population (Mio)	2010	140,4		501	
	2025	132,3		519	
	2050	116,1		524	
Median Age	2010	38,1		40,6	
	2025	41,7		45,4 (2030)	
	2050	44		47,9 (2060)	
Dependency Ratio	(Total = Child + Old Age)	Child	Old Age	Child	Old Age
	2010	21	18	34,8	28,4
	2025	25	27	/	/
	2050	27	39	37,5 (2060)	58,5 (2060)

■ ECONOMY		RUSSIA		EU	
GDP	(€) 2010	1.105,1		12.268	
	(€) 2009	883,2		11.791	
	(€) 2008	1.093,2		12.495	
GDP growth (%)	2010	4,0		1,7	
	2009	-7,8		-4,2	
	2008	5,2		0,5	
GDP per capita	(€ thousands) 2010	7.873,2		24.400	
	Global rank	56		/	
GDP Projections \$ (2015)		2.926,3		20.085	
GDP Projections (\$ (2030)	Continuity Scenario	2.487		/	
	Low Growth Scenario	1.660		/	
Foreign Currency Reserves (\$) Summer 2011		468,06		(Eurozone) 213,7	

■ INVESTMENT		RUSSIA		EU	
FDI Flows (2010)	Inflows (\$)	41,2		/	
	Outflows (\$)	51,7		/	
	From the EU (€)	-0,4		/	
	To the EU (€)	-0,4		/	
FDI Stock	Inward (2010) (\$)	423,1		/	
	Outward (2010) (\$)	433,6		/	
	From the EU (2009) (€)	88,8		/	
	To the EU (2009) (€)	27,5		/	

■ TRADE		RUSSIA		EU	
Top 5 trading partners (% Goods)	2010	Partner	%	Partner	%
		EU27	46,8	US	14,4
		China	8,9	China	13,9
		US	4,9	Russia	8,6
		Ukraine	4,3	Switzerland	6,6
		Turkey	3,9	Norway	4,4
Trade as a % of GDP (2009)	Merchandise	40,2		(Eurozone) 57,1	
	Services	8,4		(Eurozone) 16,9	
Trade with the EU (2010)	Rank	3		/	
	% EU Trade (Goods)	8,6		/	
Goods (€) (2010)	Total Imports	175,1		/	
	Total Export	303,6		/	
	Imports from the EU	86,5		/	
	Exports to the EU	158,4		/	
Services (€) (2010)	Total Imports	52,7		/	
	Total Exports	33		/	
	Imports from the EU	22,6		/	
	Exports to the EU	14,2		/	

■ INNOVATION AND COMPETITIVENESS		RUSSIA		EU	
Expenditure on R&D	GERD (PPP \$) (2010)	22,1		€237 (2008)	
	As a % of GDP	1		1,9	
	Researchers per million people (date)	3.139 (2009)		2.937 (2007)	
Global Competitiveness Index 2011-2012	Rank	66		/	
	Score	4,21		/	
GII 2009-2010 Overall Rankings	Rank	64		/	
	Score	3,03		/	
Human Capacity	Rank	46		/	
	GII Score	3,86		/	
Network Readiness Index	Rank	77		/	



ENERGY, ENVIRONMENT AND RESOURCES

		RUSSIA	EU
Total production of energy	2008 (Mtoe)	1.253,92	842,7
Total net imports of energy	2008 (Mtoe)	-536,57	1.014,2
Total primary energy supply	2008 (Mtoe)	686,76	1.751,29
Main sources of energy imports or export destinations (where indicated, % means share of total imports or exports)	OIL EXPORTS 2009: Europe and Eurasia 81% Asia 12% North and South America 6%	OIL IMPORTS 2008: OPEC 36% Russia 32% Norway 30% Kazakhstan 5% NATURAL GAS EXPORTS 2010: EU 55% CIS 28% Non-EU Europe and Turkey 10% Asia 7%	NATURAL GAS IMPORTS 2008: Russia 40% Norway 30% Algeria 15% Nigeria 4%
Renewable energy (2008)	Renewables in TPES (Mtoe)	17,7	148,3 (2009)
	Share of renewables (as a % of TPES)	2,6	8,4
	Renewables scoreboard (2011)	/	/
CO2 emissions (2008)	(Mt of CO2)	1.593,8	4.409, 4
	% of global emissions	5,7	14,7
	% annual growth 2008-2035	0,2	/
	Emissions/GDP (Kg CO2/2000 US\$)	3,71	0,39
	Per capita (t CO2)	11,2	8,8
	Per capita 2025	12,6	/
	Per capita 2035	14,4	/
Production of selected critical raw materials (2008, 2009) as share of world total.		Antimony 2% Germanium 4% Magnesium 7% Platinum 11% Tungsten 5%	/

OTHER INDICATORS

		RUSSIA	EU
% of assessed contributions to the UN regular budget (2010)		1,6	40,7
Voting cohesion with the EU at UN General Assembly (2009)	Overall	56	/
	Development and human rights	31	/
	Security	54	/
Development assistance (\$ Mio) 2009		200 (2008)	86.276
IMF voting shares	March 2011	2,6	/
	Post-2008 reform	2,3	/
	Post-2010 reform	2,5	/
Membership of main regional organisations		SCO, CIS, CSTO, Council of Europe	/
Global Presence Index		255	/

GOVERNANCE AND SOCIETY

		RUSSIA	EU
Human Development Index (2010)	Rank	65	/
Legatum Prosperity Index (Rank)	Overall Score	63	/
	Governance	101	/
	Education	38	/
	Safety and Security	82	/
Corruption Perceptions Index	Rank	154	/
GINI Index	Score (year)	43,7 (2007)	/

PUBLIC OPINION

		RUSSIA	EU
Gallup worldviews and global reports	Confidence in national government %	51	/
	Approval of country leadership %	57	/
	National economy getting better %	30	/
	Standard of living improving %	31	/
	Global warming quite serious or very serious threat %	49	/
	Approval of UN leadership %	27	/
	Approval of US leadership %	23	/
	Approval of China's leadership %	27	/
	Approval of Russia's leadership %	/	/

MILITARY BALANCE

		RUSSIA	EU
Defence Budget	(\$) (2010)	58,7	€209 (2009)
	As a % of GDP (2010)	4	1,67
	As a % of world total	3,6	/
	% change 2001-2010	82,4	29 (1999-2009)
Total Forces	Active	1.027.000	2.013.000
	Reserve	20.000.000	/
	Paramilitary / Civilian Forces	449.000	/
Military Interventions	Personnel contribution to UN Peace-keeping Operations/Rank (2011)	225/51	8.706
	% of assessed contributions to UN peacekeeping budget (2011-12)	1,98	39
	Personnel deployed in non - UN Interventions	3.900	44.331



BARASTEV / FLICKR PHOTOS

South Africa

The EU-South Africa partnership was created in 2007 to upgrade a once development-focused relationship towards a more strategic dialogue. Yet the partnership still has a long way to go to transcend its original focus and match high expectations with concrete achievements in diverse policy areas.

The partnership with South Africa is unique among EU strategic partnerships given the central role of exchanges related to development cooperation. South Africa is the largest recipient of EU bilateral aid worldwide. Under an expanding development cooperation portfolio, South Africa's major banks and the European Investment Bank have developed a close working relationship. EU aid in 2007-2013 totalled €980m, programmed under the Development Cooperation Instrument funded directly from the EU budget, while the rest of Sub-Saharan Africa receives aid under the inter-governmental European Development Fund. Beyond the annual summits, the EU-South Africa strategic partnership has functioned best at a technical level, including through mid-ranking working groups in policy fields such as social affairs, education, crime and justice. EU support has also been well-received following discretionary grants of €126m in 2011 and €122m in 2010 for tackling challenges in public health and children's education respectively.

South Africa's priorities vis-à-vis the EU are trade, development finance, technology and knowledge exchange, diplomatic support in global fora,



as well as an economic partnership agreement with the EU which fosters regional integration. Brussels, on the other hand, prioritises trade access, cooperation on energy, climate and global governance, as well as the creation of regional common goods like security, prosperity and human rights protection. Areas of convergence include transfer of know-how towards the peaceful use of nuclear energy, the promotion of sustainable agriculture and space cooperation.

While expanding to cover new ground, the partnership still has to prove its strategic value beyond development. In merchandise trade, the EU is by far South Africa's largest partner while South Africa is the EU's number thirteen. Bilateral trade in goods and services totalled almost €50bn in 2010 after a drop in 2009. EU exports of goods to South Africa increased by one third in 2010 (€21.4) with a corresponding 20 percent growth in imports (€17.9bn). Yet efforts to expand commercial exchanges and promote regional integration have been hindered by protracted and highly contentious negotiations over the Economic Partnership Agreement (EPA) covering the collective Southern African Development Community (SADC). South Africa has argued in recent years that trade agreements favour Europe rather than being mutually beneficial.

More broadly, the partnership has often proved brittle when called upon to frame strategic or highly political discussions. Tangible accomplishments resulting from cooperation in global fora have been meagre so far. At the same time, South Africa is actively pursuing a multi-vector foreign policy, seeking to boost its global diplomatic weight through different alliances and forms of South-South cooperation, for example by establishing the IBSA Dialogue in 2003 and joining the BRICS club in 2011.

The expectation gap between both partners widened in the aftermath of difficult dialogues over Zimbabwe, for example, and the climate change summit in Copenhagen. More recently, the falling out over Libya in 2011 marked a new low. After supporting the UN resolution imposing a no-fly

zone on Libya, South Africa forcefully denounced what it regarded as an excessive use of force by the coalition and protested over what it saw as open disregard for Africa's pan-continental body and African opinions on diplomacy in Libya. The public nature of recent disagreements undermines claims to a maturing strategic engagement. On the other hand, South Africa covets EU support for a future permanent UNSC seat; this explains in part its twin-track strategy of simultaneous engagement with the EU and recalcitrance towards some of its policies.

The most important long-term challenges to the strategic partnership are those external to bilateral relations per se. One is South Africa's performance in situations requiring firm continental leadership. For example, South Africa plumped for the intransigent former president Gbagbo in the Ivory Coast against majority African opinion and the wishes of both the EU and the UN. Such controversial stances present opportunity costs for the EU in terms of maintaining a single bilateral strategic partnership in Africa.

Geo-economic trends within Africa raise longer-term strategic questions for the EU. Authoritative projections estimate that Nigeria's economy could overtake South Africa's by 2023. While domestic turbulence in Nigeria gives reason for concern, such forecasts suggest that another strategic partnership in Africa could over time become an indispensable second plinth to meet the EU's diverse priorities in the continent of 54 countries, building on the EU-Nigeria Joint Way Forward document of 2009. Questions of strategic coherence between the EU-Africa partnership at the continental level and the bilateral one with South Africa also remain unaddressed. Bilateral partnerships will have to prove compatible with firmer EU re-engagement with the African Union after the disagreements occasioned by the Libya conflict.

■ DEMOGRAPHY		SOUTH AFRICA		EU	
Population (Mio)	2010	50,5		501	
	2025	53,8		519	
	2050	56,8		524	
Median Age	2010	24,9		40,6	
	2025	27,3		45,4 (2030)	
	2050	31,9		47,9 (2060)	
Dependency Ratio	(Total = Child + Old Age)	Child	Old Age	Child	Old Age
	2010	47	7	34,8	28,4
	2025	42	11	/	/
	2050	33	15	37,5 (2060)	58,5 (2060)

■ ECONOMY		SOUTH AFRICA		EU	
GDP	(€) 2010	269,5		12.268	
	(€) 2009	205,9		11.791	
	(€) 2008	188,2		12.495	
GDP growth (%)	2010	2,8		1,7	
	2009	-1,7		-4,2	
	2008	3,7		0,5	
GDP per capita	(€ thousands) 2010	5.399,3		24.400	
	Global rank	71		/	
GDP Projections \$ (2015)		473,3		20.085	
GDP Projections (\$ (2030))	Continuity Scenario	791		/	
	Low Growth Scenario	513		/	
Foreign Currency Reserves (\$) Summer 2011		41,1		(Eurozone) 213,7	

■ INVESTMENT		SOUTH AFRICA		EU	
FDI Flows (2010)	Inflows (\$)	1,5		/	
	Outflows (\$)	0,4		/	
	From the EU (€)	5,9		/	
	To the EU (€)	1		/	
FDI Stock	Inward (2010) (\$)	132,4		/	
	Outward (2010) (\$)	81,1		/	
	From the EU (2009) (€)	77,0		/	
	To the EU (2009) (€)	6,2		/	

■ TRADE		SOUTH AFRICA		EU	
Top 5 trading partners (% Goods)	2010	Partner	%	Partner	%
		EU27	31,6	US	14,4
		China	14,3	China	13,9
		USA	9	Russia	8,6
		Japan	6,9	Switzerland	6,6
		India	3,3	Norway	4,4
Trade as a % of GDP (2009)	Merchandise	47,6		(Eurozone) 57,1	
	Services	9,4		(Eurozone) 16,9	
Trade with the EU (2010)	Rank	13		/	
	% EU Trade (Goods)	1,4		/	
Goods (€) (2010)	Total Imports	64		/	
	Total Export	54,4		/	
	Imports from the EU	21,5		/	
	Exports to the EU	17,9		/	
Services (€) (2010)	Total Imports	13,6		/	
	Total Exports	10,6		/	
	Imports from the EU	5,3		/	
	Exports to the EU	3,8		/	

■ INNOVATION AND COMPETITIVENESS		SOUTH AFRICA		EU	
Expenditure on R&D	GERD (PPP \$) (2010)	3,6		€237 (2008)	
	As a % of GDP	0,7		1,9	
	Researchers per million people (date)	393 (2007)		2.937 (2007)	
Global Competitiveness Index 2011-2012	Rank	50		/	
	Score	4,34		/	
GII 2009-2010 Overall Rankings	Rank	51		/	
	Score	3,24		/	
Human Capacity	Rank	61		/	
	GII Score	3,5		/	
Network Readiness Index	Rank	61		/	



ENERGY, ENVIRONMENT AND RESOURCES

		SOUTH AFRICA	EU
Total production of energy	2008 (Mtoe)	162,95	842,7
Total net imports of energy	2008 (Mtoe)	-17,44	1.014,2
Total primary energy supply	2008 (Mtoe)	134,49	1.751,29
Main sources of energy imports or export destinations (where indicated, % means share of total imports or exports)	OIL IMPORTS 2009: Saudi Arabia 29% Iran 23% Nigeria 16% Angola 15%	OIL IMPORTS 2008: OPEC 36% Russia 32% Norway 30% Kazakhstan 5% NATURAL GAS IMPORTS 2008: Mozambique Namibia	OIL IMPORTS 2008: OPEC 36% Russia 32% Norway 30% Kazakhstan 5% NATURAL GAS IMPORTS 2008: Russia 40% Norway 30% Algeria 15% Nigeria 4%
Renewable energy (2008)	Renewables in TPES (Mtoe)	14,1	148,3 (2009)
	Share of renewables (as a % of TPES)	10,5	8,4
	Renewables scoreboard (2011)	26/41	/
CO2 emissions (2008)	(Mt of CO2)	337,4	4.409, 4
	% of global emissions	1,4	14,7
	% annual growth 2008-2035	(Africa) 1,8	/
	Emissions/GDP (Kg CO2/2000 US\$)	1,84	0,39
	Per capita (t CO2)	6,9	8,8
	Per capita 2025	/	/
	Per capita 2035	/	/
Production of selected critical raw materials (2008, 2009) as share of world total.		Antimony 2% Platinum 79%	/

OTHER INDICATORS

		SOUTH AFRICA	EU
% of assessed contributions to the UN regular budget (2010)		0,38	40,7
Voting cohesion with the EU at UN General Assembly (2009)	Overall	56	/
	Development and human rights	25	/
	Security	73	/
Development assistance (\$ Mio) 2009		109	86.276
IMF voting shares	March 2011	0,8	/
	Post-2008 reform	0,7	/
	Post-2010 reform	0,6	/
Membership of main regional organisations		AU, SADC	/
Global Presence Index		33,6	/

GOVERNANCE AND SOCIETY

		SOUTH AFRICA	EU
Human Development Index (2010)	Rank	112	/
Legatum Prosperity Index (Rank)	Overall Score	66	/
	Governance	40	/
	Education	78	/
	Safety and Security	97	/
Corruption Perceptions Index	Rank	54	/
GINI Index	Score (year)	57,8 (2000)	/

PUBLIC OPINION

		SOUTH AFRICA	EU
Gallup world-views and global reports	Confidence in national government %	59	/
	Approval of country leadership %	53	/
	National economy getting better %	38	/
	Standard of living improving %	34	/
	Global warming quite serious or very serious threat %	71	/
	Approval of UN leadership %	70	/
	Approval of US leadership %	92	/
	Approval of China's leadership %	47	/
	Approval of Russia's leadership %	37	/

MILITARY BALANCE

		SOUTH AFRICA	EU
Defence Budget	(\$ (2010)	4,5	€209 (2009)
	As a % of GDP (2010)	1,2	1,67
	As a % of world total	0,27	/
	% change 2001-2010	22	29 (1999-2009)
Total Forces	Active	62.082	2.013.000
	Reserve	12.382	/
	Paramilitary / Civilian Forces	15.071	/
Military Interventions	Personnel contribution to UN Peacekeeping Operations/Rank (2011)	2.187/14	8.706
	% of assessed contributions to UN peacekeeping budget (2011-12)	0,07	39
	Personnel deployed in non - UN Interventions	488	44.331



EMMANUEL DYAN / FLICKR PHOTOS

South Korea

The conclusion of the Free Trade Agreement in October 2010 and the political Framework Agreement in May 2010 enabled the EU to add one more strategic partner to its list at the EU-South Korea Summit last year. The EU-South Korea strategic partnership is based on reciprocal intentions, like-minded values and common global objectives, balanced with a high-performance trade component as its backbone. Despite initial reluctance on the part of the EU to expand the list of strategic partnerships before defining what they are, South Korea fits well into the matrix.

Rising from the ashes of the Korean War, South Korea became one of the fastest growing economies. Today it forms part of the OECD, the Development Assistance Committee (DAC), as well as the G20. On the whole, the partnership is in very good shape. South Korea is a key compatible partner in an increasingly important part of the world. Like the EU, South Korea is an upcoming international actor sharing similar positions on global priorities concerning climate change, security, development assistance, UN peace-keeping, denuclearisation, the G20 and the reform of the global financial architecture. In addition, the value structures of the EU and South Korea largely overlap: democracy, plurality, human rights and freedom. Regular political meetings take place and both parties intend to step up the number of dialogues.

South Korea's priorities mirror the EU's aspirations for the strategic partnership. For South Korea, this means access to the world's biggest integrat-



ed market, recognition as an important actor on the global stage, and support in its relations with North Korea. For the EU, South Korea represents another bridge to Asia, the opportunity for close coordination on global issues and a chance to boost the EU's political visibility in the region.

The EU-South Korea strategic partnership enables both partners to diversify their political options, beyond Japan and China for the EU, and beyond the US for South Korea. Besides, latent tensions on the Korean Peninsula give the EU grounds to prove its political maturity in a theatre where it has not played a very visible geopolitical role, in addition to providing the solid international support of a 27-nation strong bloc to South Korea. Following the shelling of the South Korean island of Yeonpyeong by North Korea on 23 November 2010, the EU came out with a very strongly worded statement in support of its strategic partner. The two sides have recently conducted their first ever political dialogue on North Korea.

Trade forms a key priority of the EU-South Korea partnership. South Korea is the 15th largest global economy in terms of nominal GDP or 12th largest according to purchasing power parity (PPP). It is also the seventh largest exporter and the tenth largest importer globally. South Korea has resurfaced dynamically from the global financial meltdown, increasing its growth rate from 0.2 percent in 2009 to 6.1 percent in 2010. Trade in goods with the EU, which had dropped to €53.9 billion in 2009 from €65.1 billion in 2008, shot up by 17 percent to €66.6 billion in 2010. Today, South Korea is the EU's ninth largest trading partner in goods, and the EU, South Korea's fourth. The landmark EU-South Korea Free Trade Agreement (FTA) is part of the EU's new generation FTAs launched in 2007, and the first of its kind for the EU in the growing geoeconomic hub of the world, Asia.

The FTA removes 98.7 percent of duties on industrial and agricultural goods within a five-year period, with a view to eliminating the remain-

der of the tariffs in the future. Studies estimate that the accord will create new trade in goods and services worth €19.1 billion for the EU and €12.8 billion for South Korea, besides doubling bilateral trade by 2030. Gains due to the elimination of duties already amount to €1.6 billion annually for EU exporters. The services sector will also expand. Currently trade in services stands at around €9.9bn with a €2.1bn balance in favour of the EU. In principle, the FTA will open up this sector far beyond the South Korea-US draft FTA, creating opportunities worth billions. The EU FTA also gave South Korea leverage to step up pressure on the US to conclude their respective FTA.

Politically, the EU's insistence on normative preconditions like human rights and environmental standards, especially in the Framework Agreement, is not received warmly by South Korea. That the Framework Agreement is linked to the FTA, meaning that a serious breach of any stipulations or political clauses within the Framework Agreement would result in a suspension of the FTA, is a significant discomfort for Seoul. While like the rest of Asia, South Korea might perceive the emphasis on values and human rights in EU external relations as moral preaching, it is keen to partner the EU increasingly on democracy and value promotion. The Framework Agreement in particular foresees a Human Rights Consultations component (i.e. bilateral deliberations on human rights within the UN system). Cooperation on peacekeeping within the UN framework is ongoing and provides the prospect of deepening bilateral relations. Other opportunities include collaboration on climate change control, green technology, green growth and Research and Technical Development. The potential for cooperation will further expand as South Korea hosts the Nuclear Security Summit in 2012, where both partners plan to meet on the sidelines.

■ DEMOGRAPHY		SOUTH KOREA		EU	
Population (Mio)	2010	48,5		501	
	2025	49,5		519	
	2050	44,1		524	
Median Age	2010	37,9		40,6	
	2025	45,5		45,4 (2030)	
	2050	53,7		47,9 (2060)	
Dependency Ratio	(Total = Child + Old Age)	Child	Old Age	Child	Old Age
	2010	22	15	34,8	28,4
	2025	19	28	/	/
	2050	21	63	37,5 (2060)	58,5 (2060)

■ ECONOMY		SOUTH KOREA		EU	
GDP	(€) 2010	759,7		12.268	
	(€) 2009	596,9		11.791	
	(€) 2008	631,7		12.495	
GDP growth (%)	2010	6,1		1,7	
	2009	0,2		-4,2	
	2008	2,3		0,5	
GDP per capita	(€ thousands) 2010	15.532,1		24.400	
	Global rank	33		/	
GDP Projections \$ (2015)		1.476		20.085	
GDP Projections (\$ (2030))	Continuity Scenario	2.122		/	
	Low Growth Scenario	1.775		/	
Foreign Currency Reserves (\$) Summer 2011		304,4		(Eurozone) 213,7	

■ INVESTMENT		SOUTH KOREA		EU	
FDI Flows (2010)	Inflows (\$)	6,8		/	
	Outflows (\$)	19,2		/	
	From the EU (€)	0,5		/	
	To the EU (€)	1		/	
FDI Stock	Inward (2010) (\$)	127		/	
	Outward (2010) (\$)	139		/	
	From the EU (2009) (€)	28,9		/	
	To the EU (2009) (€)	9,9		/	

■ TRADE		SOUTH KOREA		EU	
Top 5 trading partners (% Goods)	2010	Partner	%	Partner	%
		China	24,5	US	14,4
		Japan	11,5	China	13,9
		US	10,8	Russia	8,6
		EU27	9,7	Switzerland	6,6
Singapore	3,9	Norway	4,4		
Trade as a % of GDP (2009)	Merchandise	82,5		(Eurozone) 57,1	
	Services	16,1		(Eurozone) 16,9	
Trade with the EU (2010)	Rank	9		/	
	% EU Trade (Goods)	2,3		/	
Goods (€) (2010)	Total Imports	304,7		/	
	Total Export	315,9		/	
	Imports from the EU	28		/	
Services (€) (2010)	Exports to the EU	38,7		/	
	Total Imports	70,1		/	
	Total Exports	61,5		/	
	Imports from the EU	6		/	
	Exports to the EU	3,9		/	

■ INNOVATION AND COMPETITIVENESS		SOUTH KOREA		EU	
Expenditure on R&D	GERD (PPP \$) (2010)	42,9		€237 (2008)	
	As a % of GDP	3		1,9	
	Researchers per million people (date)	4.904 (2008)		2.937 (2007)	
Global Competitiveness Index 2011-2012	Rank	24		/	
	Score	5,02		/	
GII 2009-2010 Overall Rankings	Rank	20		/	
	Score	4,24		/	
Human Capacity	Rank	23		/	
	GII Score	4,52		/	
Network Readiness Index	Rank	10		/	



ENERGY, ENVIRONMENT AND RESOURCES

		SOUTH KOREA	EU
Total production of energy	2008 (Mtoe)	44,73	842,7
Total net imports of energy	2008 (Mtoe)	195,11	1.014,2
Total primary energy supply	2008 (Mtoe)	226,95	1.751,29
Main sources of energy imports or export destinations (where indicated, % means share of total imports or exports)	OIL IMPORTS 2009:		OIL IMPORTS 2008:
	Saudi Arabia 27%		OPEC 36%
	UAE 14%		Russia 32%
	Kuwait 13%		Norway 30%
	Iran 8%		Kazakhstan 5%
	LNG IMPORTS 2008:		NATURAL GAS IMPORTS 2008:
	Qatar 32%		Russia 40%
	Malaysia 23%		Norway 30%
	Oman 17%		Algeria 15%
	Indonesia 11%		Nigeria 4%
Renewable energy (2008)	Renewables in TPES (Mtoe)	1,3	148,3 (2009)
	Share of renewables (as a % of TPES)	0,6	8,4
	Renewables scoreboard (2011)	16/45	/
CO2 emissions (2008)	(Mt of CO2)	501,3	4.409, 4
	% of global emissions	1,7	14,7
	% annual growth 2008-2035	1	/
	Emissions/GDP (Kg CO2/2000 US\$)	0,67	0,39
	Per capita (t CO2)	10,3	8,8
	Per capita 2025	/	/
	Per capita 2035	/	/
Production of selected critical raw materials (2008, 2009) as share of world total.		Indium 9%	/

OTHER INDICATORS

		SOUTH KOREA	EU
% of assessed contributions to the UN regular budget (2010)		2,2	40,7
Voting cohesion with the EU at UN General Assembly (2009)	Overall	87	/
	Development and human rights	87	/
	Security	73	/
Development assistance (\$ Mio) 2009		816	86.276
IMF voting shares	March 2011	1,3	/
	Post-2008 reform	1,3	/
	Post-2010 reform	1,7	/
Membership of main regional organisations		ASEM, East Asia Summit, OECD	/
Global Presence Index		113	/

GOVERNANCE AND SOCIETY

		SOUTH KOREA	EU
Human Development Index (2010)	Rank	12	/
Legatum Prosperity Index (Rank)	Overall Score	27	/
	Governance	31	/
	Education	8	/
	Safety and Security	33	/
Corruption Perceptions Index	Rank	39	/
GINI Index	Score (year)	31,6 (2004)	/

PUBLIC OPINION

		SOUTH KOREA	EU
Gallup worldviews and global reports	Confidence in national government %	32	/
	Approval of country leadership %	40	/
	National economy getting better %	55	/
	Standard of living improving %	48	/
	Global warming quite serious or very serious threat %	83	/
	Approval of UN leadership %	57	/
	Approval of US leadership %	55	/
	Approval of China's leadership %	36	/
	Approval of Russia's leadership %	19	/

MILITARY BALANCE

		SOUTH KOREA	EU
Defence Budget	(\$) (2010)	27,6	€209 (2009)
	As a % of GDP (2010)	2,8	1,67
	As a % of world total	1,7	/
	% change 2001-2010	45,2	29 (1999-2009)
Total Forces	Active	687.000	2.013.000
	Reserve	4.500.000	/
	Paramilitary / Civilian Forces	4.500	/
Military Interventions	Personnel contribution to UN Peace- keeping Operations/Rank (2011)	727/32	8.706
	% of assessed contributions to UN peacekeeping budget (2011-12)	2,26	39
	Personnel deployed in non - UN Interventions	0	44.331

United States

Like the US as a global power, the strategic partnership between the US and Europe stands in a league of its own. The economies of the partners are profoundly interlinked, human and societal bonds are extensive and the US has been a predominant European power for over six decades, playing a vital role for the security of the continent. While serious differences have punctuated a relationship of such scope and depth, the partnership between US and Europe has been a 'grand' strategic one in that it has aimed to shape a liberal international order based on shared values and fit the interests of the parties. Whether the partnership between the US and the EU as such will acquire this quality and ambition in a more polycentric and competitive world is a major question mark.

The US and the EU are each other's main trade and investment partners, with investment flows being the most dynamic component. The US is the biggest destination for EU goods (around 20 percent) and services (around 29 percent). The EU has absorbed about 60 percent of American FDI over the last decade, during which US investment in the Netherlands alone has been nine times larger than that in China. The EU's current FDI stock in the US is 40 percent larger than its investment stock in all other nine strategic partners combined. Incoming and outgoing portfolio investments among the two partners account for an even larger share of the total. An estimated 15 million jobs depend on bilateral trade and investment on both sides of the Atlantic. Nonetheless, as a share of EU external trade in goods, the US has dropped from



SACHAD / FLICKR PHOTOS



over 18 percent to 14.4 percent in only four years, while China climbed up to 13.9 percent in 2010.

The vision of a transatlantic market has long inspired more debate than action. And yet the benefits would be considerable. The elimination or drastic reduction of residual tariffs on goods and services is expected to generate annual GDP gains of about 0.6 percent for the EU and 1.5 percent for the US. Removing non-tariff barriers and regulatory convergence would in time deliver annual gains of about €122bn for the EU and €41bn for the US. The Transatlantic Economic Council, set up in 2007 and at first not very effective, has changed gear in the last year with the adoption of common principles for regulation, the start of upstream coordination on planned regulations and the launch of a new Innovation Action Partnership. The EU and the US have also achieved good cooperation on how to engage with other countries, such as China, and on issues of shared economic concern, such as access to critical raw materials.

Progress in this and other domains notwithstanding, a sense of precariousness surrounds the transatlantic partnership and its strategic nature is increasingly questioned. The renewed economic crisis hitting the EU and the US polarises domestic politics and entails frustration with respective shortcomings, for example with the inadequacy of the response to the EU debt crisis. More broadly, the shifting global context of the EU-US partnership magnifies its asymmetric character.

As the international system becomes more competitive and heterogeneous, the largest global power has adopted a pragmatic approach to cooperation based on open dialogue and inclusive coalition-building in the pursuit of well-defined interests. The US acts as a pole harnessing its unparalleled connections to a variety of alliances, networks and clubs, not least to share more of the burden of the global commitments it has been carrying. The performance of the EU, whose internal differences have been exposed time and again by the debt crisis, the Arab

spring and the intervention in Libya, has underwhelmed the Obama administration. Conversely, from a European standpoint the latter has failed to join forces with the EU, or support EU priorities, on issues such as climate change and the Arab-Israeli conflict.

Talk of an emerging G2 with the US and China in the global driving seat is probably delusional but the alternative proposition of a G3 including the EU has failed to stick. The 2011 Transatlantic Trends poll has found that a majority of Americans (51 percent) consider Asia more important to US national interest than the EU (38 percent). Meanwhile, across the EU, the result is roughly the opposite, with the US regarded as the most important partner by 52 percent of Europeans. Talk by former US defence secretary Gates in June of a demilitarising Europe undermining American interest in the future of a two-tier NATO marked the peak of the last round of transatlantic quarrels.

Yet on most issues the EU and the US remain indispensable, if no longer sufficient, partners to mobilise and implement collective action on common challenges. Contentious matters such as the regulation of global finance, but also the Passenger Name Record and data protection regimes, do not detract from the basic point that the two parties share vast normative ground and an overriding interest in preserving and extending, by peaceful means, political and economic freedoms in the world. If pursued with more determination, ongoing cooperation on issues such as renewable energy, energy security, development issues, food security, global health and cyber-security could deliver much benefit well beyond the confines of the partnership. The real 'grand' strategic test for the EU-US partnership will lie in their ability to forge a common vision of the future international order, join forces behind it and engage other major state and non-state actors in its definition and pursuit.

■ DEMOGRAPHY		US		EU	
Population (Mio)	2010	317,6		501	
	2025	358,7		519	
	2050	404		524	
Median Age	2010	36,6		40,6	
	2025	38,7		45,4 (2030)	
	2050	41,7		47,9 (2060)	
Dependency Ratio	(Total = Child + Old Age)	Child	Old Age	Child	Old Age
	2010	30	19	34,8	28,4
	2025	29	29	/	/
	2050	28	35	37,5 (2060)	58,5 (2060)

■ ECONOMY		US		EU	
GDP	(€) 2010	11.056,6		12.268	
	(€) 2009	10.122,6		11.791	
	(€) 2008	9.657,6		12.495	
GDP growth (%)	2010	2,8		1,7	
	2009	-2,6		-4,2	
	2008	0,0		0,5	
GDP per capita	(€ thousands) 2010	35.666,9		24.400	
	Global rank	9		/	
GDP Projections \$ (2015)		17.993		20.085	
GDP Projections (\$ (2030))	Continuity Scenario	22.258		/	
	Low Growth Scenario	20.136		/	
Foreign Currency Reserves (\$) Summer 2011		48,7		(Eurozone) 213,7	

■ INVESTMENT		USA		EU	
FDI Flows (2010)	Inflows (\$)	228,2		/	
	Outflows (\$)	329		/	
	From the EU (€)	11,9		/	
	To the EU (€)	28,5		/	
FDI Stock	Inward (2010) (\$)	3.451,4		/	
	Outward (2010) (\$)	4.843,3		/	
	From the EU (2009) (€)	1.134,0		/	
	To the EU (2009) (€)	1.044,1		/	

■ TRADE		US		EU	
Top 5 trading partners (% Goods)	2010	Partner	%	Partner	%
		EU27	17,8	US	14,4
		Canada	16,6	China	13,9
		China	14,9	Russia	8,6
		Mexico	12,4	Switzerland	6,6
		Japan	5,8	Norway	4,4
Trade as a % of GDP (2009)	Merchandise	18,8		(Eurozone) 57,1	
	Services	6,1		(Eurozone) 16,9	
Trade with the EU (2010)	Rank	1		/	
	% EU Trade (Goods)	14,4		/	
Goods (€) (2010)	Total Imports	1.460,3		/	
	Total Export	945,4		/	
	Imports from the EU	242,1		/	
	Exports to the EU	169,5		/	
Services (€) (2010)	Total Imports	270		/	
	Total Exports	388,5		/	
	Imports from the EU	125,2		/	
	Exports to the EU	131		/	

■ INNOVATION AND COMPETITIVENESS		US		EU	
Expenditure on R&D	GERD (PPP \$) (2010)	395,8		€237 (2008)	
	As a % of GDP	2,8		1,9	
	Researchers per million people (date)	4.576 (2007)		2.937 (2007)	
Global Competitiveness Index 2011-2012	Rank	5		/	
	Score	5,43		/	
GII 2009-2010 Overall Rankings	Rank	11		/	
	Score	4,57		/	
Human Capacity	Rank	5		/	
	GII Score	5,19		/	
Network Readiness Index	Rank	5		/	



ENERGY, ENVIRONMENT AND RESOURCES

		US	EU
Total production of energy	2008 (Mtoe)	1.706,06	842,7
Total net imports of energy	2008 (Mtoe)	634,45	1.014,2
Total primary energy supply	2008 (Mtoe)	2.283,72	1.751,29
Main sources of energy imports or export destinations (where indicated, % means share of total imports or exports)		OIL IMPORTS 2010: Canada 25% Saudi Arabia 12% Nigeria 11% Venezuela 10% Mexico 9% BY REGION 2010: Western hemisphere 49% Africa 23% Persian Gulf 18% NATURAL GAS IMPORTS 2008: Canada 90%	OIL IMPORTS 2008: OPEC 36% Russia 32% Norway 30% Kazakhstan 5% NATURAL GAS IMPORTS 2008: Russia 40% Norway 30% Algeria 15% Nigeria 4%
Renewable energy (2008)	Renewables in TPES (Mtoe)	116,8	148,3 (2009)
	Share of renewables (as a % of TPES)	5,1	8,4
	Renewables scoreboard (2011)	2/67	/
CO2 emissions (2008)	(Mt of CO2)	5.595,9	4.409, 4
	% of global emissions	18,1	14,7
	% annual growth 2008-2035	0,3	/
	Emissions/GDP (Kg CO2/2000 US\$)	0,48	0,39
	Per capita (t CO2)	18,3	8,8
	Per capita 2025	16,8	/
	Per capita 2035	16,2	/
Production of selected critical raw materials (2008, 2009) as share of world total.		Beryllium 85% Germanium 3%	/

OTHER INDICATORS

		US	EU
% of assessed contributions to the UN regular budget (2010)		22	40,7
Voting cohesion with the EU at UN General Assembly (2009)	Overall	56	/
	Development and human rights	75	/
	Security	82	/
Development assistance (\$ Mio) 2009		28.831	86.276
IMF voting shares	March 2011	16,7	/
	Post-2008 reform	16,7	/
	Post-2010 reform	16,4	/
Membership of main regional organisations		NATO, NAFTA, OAS, OECD, East Asia Summit	/
Global Presence Index		1.000	/

GOVERNANCE AND SOCIETY

		US	EU
Human Development Index (2010)	Rank	4	/
	Overall Score	10	/
Legatum Prosperity Index (Rank)	Governance	3	/
	Education	9	/
	Safety and Security	25	/
	Corruption Perceptions Index	Rank	22
GINI Index	Score (year)	40,8 (2000)	/

PUBLIC OPINION

		US	EU
Gallup worldviews and global reports	Confidence in national government %	42	/
	Approval of country leadership %	39	/
	National economy getting better %	40	/
	Standard of living improving %	51	/
	Global warming quite serious or very serious threat %	55	/
	Approval of UN leadership %	42	/
	Approval of US leadership %	/	/
	Approval of China's leadership %	22	/
	Approval of Russia's leadership %	27	/

MILITARY BALANCE

		US	EU
Defence Budget	(\$) (2010)	698	€209 (2009)
	As a % of GDP (2010)	4,8	1,67
	As a % of world total	43	/
	% change 2001-2010	81,3	29 (1999-2009)
Total Forces	Active	1.580.255	2.013.000
	Reserve	864.547	/
	Paramilitary / Civilian Forces	11.035	/
Military Interventions	Personnel contribution to UN Peace-keeping Operations/Rank (2011)	100/63	8.706
	% of assessed contributions to UN peacekeeping budget (2011-12)	27,17	39
	Personnel deployed in non - UN Interventions	188.107	44.331

Comparative Indicators

Amid the unfolding debate on how to make EU strategic partnerships more effective, this mapping exercise seeks to connect an assessment of their state-of-play to a wealth of data and factual information on each. The overview of the ten strategic partners offers a unique comparative perspective on their respective weight in different areas of international relations, the extent of their economic ties with the Union and also their domestic strengths and weaknesses. This overview is by no means comprehensive, but it aims to provide a stepping stone for a more informed, evidence-based debate on the EU's strategic partnerships.

The following highlights are extrapolated from the comparative table that informs this publication, outlining some of the salient findings on issues such as trade and investment, demographic trends, energy and climate change and multilateral commitments.

- The EU is the biggest merchandise trade partner of six of its ten strategic partners (Brazil, China, India, the Russian Federation, South Africa, and the US); the second largest for two of them (Canada and Mexico); the third largest for Japan and the fourth for South Korea.
- The ten EU strategic partners account for about 52 percent of EU external trade in goods. The US and China together cover in excess of 28 percent of the EU's external trade in goods, a similar share to that of the BRICS countries combined. Asian strategic partners account for over 22 percent, while North American partners for about 17 percent.
- The EU had a positive 2010 trade balance in goods with Canada, India, Mexico, South Africa and the United States, but it registered large trade deficits with China, Russia (due to energy imports) and Japan. The trade balance in services is positive with all strategic partners except the United States.

- The EU's FDI stock in the US is roughly 40 percent larger than in the other nine strategic partners together. Amongst the nine, Canada holds the second largest stock of the EU's FDI, about two and a half times more than that in China. Within the BRICS countries, the EU's FDI stock in Brazil is by far the biggest, followed by Russia, South Africa, China and India.
- The FDI stock in the EU from all other strategic partners is about one third of that coming from the US. The FDI stock from Brazil is larger than that of the other BRICS countries combined, and that from Canada is larger than that of all the five BRICS countries together.
- Japan's old age dependency ratio is and will remain up to 2050 the highest among the EU's strategic partners, followed by the EU's itself. South Korea's old age dependency ratio is projected to grow four-fold in the next 40 years (and overtake the EU's by then). Over the same timeframe, China and Brazil's ratio will grow by three and a half times, overtaking that of Japan in 2010. In 2050, the old age dependency ratio of these two partners is expected to be slightly higher than that of the US.
- Per capita CO2 emissions of the US are more than double those of the EU, almost four times bigger than China's, about ten times Brazil's and fifteen times India's. On the other hand, the emission intensity (CO2 emissions/GDP at market exchange rates) of Russia is by far the highest among the EU's strategic partners, followed by China, South Africa and India.
- The US contributes financially to the UN regular budget and to the UN peacekeeping budget more than all the other strategic partners of the Union combined. However, the American contribution to the UN regular budget is just above half of that of the EU and its member states, and 70 percent of that to the peacekeeping budget. China's

contribution to both budgets is roughly equivalent to that of Canada and about four times smaller than that of Japan.

Every effort has been made to maximise the comparability of data across the ten strategic partners and the consistency of the indicators related to each of them. Endnotes provide fuller information on indicators and sources. Some of the figures reported in the table are subject to considerable annual oscillations. For example, as a consequence of the economic downturn, EU FDI inflows and outflows in 2010 have been unusually small. More generally, different sources may report considerably different estimates, notably when it comes to projections. Those included here should therefore be considered as indicative of envisaged trends and not as definitive figures. Where not otherwise indicated, economic data are in billions.

EUROPEAN UNION STRATEGIC PARTNERS

Indicators

		The Americas								Africa		Europe				Asia																										
										BRICS																																
		United States		Canada		Mexico		Brazil		South Africa		Russia		India		China		Japan		South Korea																						
Demography	Population (Mio) ¹	2010		317,6		33,9		110,6		195,4		50,5		140,4		1.214,5		1.354,1		127		48,5																				
		2025		358,7		38,7		123,4		213,8		53,8		132,3		1.431,3		1.453,1		120,8		49,5																				
		2050		404		44,4		129		218,5		56,8		116,1		1.613,8		1.417		101,7		44,1																				
	Median Age ²	2010		36,6		39,9		27,6		29		24,9		38,1		25		34,2		44,7		37,9																				
		2025		38,7		42,9		34		35,8		27,3		4,7		29,9		38,9		50,6		45,5																				
		2050		41,7		45,2		43,9		45,6		31,9		44		38,4		45,2		55,1		53,7																				
Dependency Ratio ³	(Total = Child + Old Age)		Child		Old Age		Child		Old Age		Child		Old Age		Child		Old Age		Child		Old Age																					
	2010		30		19		23		20		43		10		38		10		47		7		21		18		48		8		28		11		21		35		22		15	
	2025		29		29		25		32		31		15		26		16		42		11		25		27		36		11		26		19		19		50		19		28	
	2050		28		35		26		43		26		36		23		36		33		15		27		39		27		20		25		38		22		74		21		63	
Economy	GDP	(€) 2010 ⁴		11.056,6		1.187,3		783,8		1.576,8		269,5		1.105,1		1.160,1		4.434,1		4.117,7		759,7																				
		(€) 2009 ⁵		10.122,6		957,9		627,2		1.128,5		205,9		883,2		886,8		3.519,5		3.634,1		596,9																				
		(€) 2008 ⁵		9.657,6		951,9		738,3		1.096,4		188,2		1.093,2		827,8		2.941,4		3.337,8		631,7																				
	GDP growth (%) ⁷	2010		2,8		3,1		5,5		7,5		2,8		4,0		10,4		10,3		3,9		6,1																				
		2009		-2,6		-2,5		-6,5		-0,6		-1,7		-7,8		6,8		9,2		-6,3		0,2																				
		2008		0,0		0,5		1,5		5,2		3,7		5,2		5,1		9,6		-1,2		2,3																				
	GDP per capita	(€ thousands) 2010 ⁸		35.666,9		34.860,8		7.215,8		8.159,1		5.399,3		7.873,2		954,1		3.305,5		32.300,2		15.532,1																				
		Global rank ⁹		9		12		61		53		71		56		138		94		16		33																				
	GDP Projections \$ (2015) ¹⁰		17.993		2.000		1.427,5		3.103		473,3		2.926,3		2.516,3		10.062		6.379,6		1.476																					
	GDP Projections \$ (2030) ¹¹	Continuity Scenario		22.258		2.083		2.397		2.440		791		2.487		5.328		21.479		5.786		2.122																				
Low Growth Scenario		20.136		1.759		1.585		1.630		513		1.660		3.106		12.510		5.136		1.775																						
Foreign Currency Reserves (\$) Summer 2011 ¹²		48,7		50,6		122,6		344,2		41,1		468,6		286,1		3.045 ³		1.135,2		304,4																						
Trade	Top 5 trading partners (% Goods) ¹⁴	2010	Partner	%	Partner	%	Partner	%	Partner	%	Partner	%	Partner	%	Partner	%	Partner	%	Partner	%	Partner	%																				
			EU27	17,8	US	62,4	US	68,3	EU27	22,9	EU27	31,6	EU27	46,8	EU27	15,6	EU27	17	China	21,8	China	24,5																				
			Canada	16,6	EU27	10,4	EU27	8	China	14,9	China	14,3	China	8,9	China	11,4	USA	13,6	US	13,7	Japan	11,5																				
			China	14,9	China	7,4	Canada	4,7	US	12,5	USA	9	US	4,9	US	8,8	Japan	10,5	EU27	11,1	US	10,8																				
			Mexico	12,4	Mexico	3,5	China	4,5	Argentina	8,7	Japan	6,9	Ukraine	4,3	UAE	8,4	HK	8,1	S.Korea	6,6	EU27	9,7																				
			Japan	5,8	Japan	2,9	Japan	2,4	Japan	3,7	India	3,3	Turkey	3,9	Saudi Arabia	4,3	S. Korea	7,3	Australia	4,4	Singapore	3,9																				
	Trade as a % of GDP (2009) ¹⁵	Merchandise		18,8		48,4		53,9		18		47,6		40,2		29,9		44,3		22,3		82,5																				
		Services		6,1		10,3		4,5		4,7		9,4		8,4		12,5		5,8		5,5		16,1																				
	Trade with the EU (2010) ¹⁶	Rank		1		11		20		10		13		3		8		2		6		9																				
		% EU Trade (Goods)		14,4		1,6		1,2		2,2		1,4		8,6		2,4		13,9		3,8		2,3																				
	Goods (e) (2010) ¹⁷	Total Imports		1.460,3		322,1		218		148,5		64		175,1		255,3		966,9		506,8		304,7																				
		Total Export		945,4		291,5		214,1		151,7		54,4		303,6		155,1		1.172,5		542		315,9																				
		Imports from the EU		242,1		26,6		21,4		31,3		21,5		86,5		34,8		113,1		47,3		28																				
		Exports to the EU		169,5		20,1		13,1		32,3		17,9		158,4		33,1		282		64,9		38,7																				
	Services (e) (2010) ¹⁸	Total Imports		270		67,4		17,4		45		13,6		52,7		88,2		145		117,1		70,1																				
Total Exports		388,5		50		12,2		22,8		10,6		33		82,6		128,4		103,8		61,5																						
Imports from the EU		125,2		12,3		4,1		9,9		5,3		22,6		9,8		20,2		18,3		6																						
Exports to the EU		131		9,1		2,6		5,5		3,8		14,2		8,1		16,3		14,5		3,9																						
FDI Flows (2010)	Inflows (\$) ¹⁹		228,2		23,4		18,6		48,4		1,5		41,2		26,6		105,7		-1,2		6,8																					
	Outflows (\$) ²⁰		329		38,5		14,3		11,5		0,4		51,7		14,6		68		56,2		19,2																					
	From the EU (€) ²¹		11,9		-4,1		3,8		6,2		5,9		-0,4		3		4,9		-4,1		0,5																					
	To the EU (€) ²²		28,5		27,7		2,9		3,8		1		-0,4		0,6		0,9		1,5		1																					
	Inward (2010) (\$) ²³		3.451,4		561,1		327,2		472,5		132,4		423,1		198		578,9		214,8		127																					
FDI Stock	Outward (2010) (\$) ²⁴		4.843,3		616,1		66,1		181		81,1		433,6		92,4		297,6		831		139																					
	From the EU (2009) (€) ²⁵		1.134,0		157,5		58,3		132,2		77,0		88,8		27,2		58,3		84,0		28,9																					
	To the EU (2009) (€) ²⁶		1.044,1		119,5		14,4		56,3		6,2		27,5		5,5		5,7		135,3		9,9																					

Indicators

			The Americas			Africa	Europe	Asia					
						BRICS							
			United States	Canada	Mexico	Brazil	South Africa	Russia	India	China	Japan	South Korea	
Innovation and Competitiveness	Expenditure on R&D	GERD (2010) (PPP \$) ²⁷	395,8	23,7	6	18,6	3,6	22,1	33,3	141,4	142	42,9	
		As a % of GDP ²⁸	2,8	1,8	0,4	0,9	0,7	1	0,9	1,4	3,3	3	
		Researchers per million people (date) ²⁹	4.576 (2007)	4.339 (2007)	353 (2007)	694 (2008)	393 (2007)	3.139 (2009)	137 (2005)	1.191 (2008)	5.159 (2008)	4.904 (2008)	
	Global Competitiveness Index 2011-2012 ³⁰	Rank	5	12	58	53	50	66	56	26	9	24	
		Score	5,43	5,33	4,29	4,32	4,34	4,21	4,30	4,90	5,40	5,02	
	GII 2009-2010 Overall Rankings ³¹	Rank	11	12	69	68	51	64	56	43	13	20	
		GII Score	4,57	4,55	2,96	2,97	3,24	3,03	3,1	3,32	4,5	4,24	
	Human Capacity ³²	Rank	5	10	80	73	61	46	38	87	17	23	
GII Score		5,19	4,99	3,36	3,42	3,5	3,86	4,03	3,29	4,62	4,52		
Network Readiness Index ³³	Rank	5	8	78	56	61	77	48	36	19	10		
Energy, Environment and Resources	Total production of energy ³⁴	2008 (Mtoe)	1.706,06	407,38	233,60	228,13	162,95	1.253,92	468,31	1.993,31	88,66	44,73	
	Total net imports of energy ³⁵	2008 (Mtoe)	634,45	-144,67	-47,21	26,97	-17,44	-536,57	157,89	210	418,89	195,11	
	Total primary energy supply ³⁶	2008 (Mtoe)	2.283,72	266,77	180,61	248,53	134,49	686,76	620,97	2.131	495,84	226,95	
	Main sources of energy imports or export destinations (where indicated, % means share of total imports or exports) ³⁷		OIL IMPORTS 2010: Canada 25% Saudi Arabia 12% Nigeria 11% Venezuela 10% Mexico 9%	OIL IMPORTS 2008: Algeria Norway US	OIL EXPORTS 2009: 1,2m b/d to US (100%) NATURAL GAS IMPORTS 2009: US 75%	NATURAL GAS IMPORTS 2009: Bolivia 96%	OIL IMPORTS 2009: Saudi Arabia 29% Iran 23% Nigeria 16% Angola 15%	OIL EXPORTS 2009: Europe and Eurasia 81% Asia 12% North and South America 6%	OIL IMPORTS 2009: Saudi Arabia 18% Iran 16% Kuwait 10% Nigeria 8% Angola 5%	OIL IMPORTS 2009: Saudi Arabia 21% Angola 16% Iran 11,5% Russia 7,6% Sudan 6%	OIL IMPORTS 2009: Saudi Arabia 27% UAE 20% Qatar 12% Iran 9% Kuwait 9%	OIL IMPORTS 2009: Saudi Arabia 27% UAE 14% Kuwait 13% Iran 8%	
			BY REGION 2010: Western hemisphere 49% Africa 23% Persian Gulf 18%	OIL EXPORTS 2008: 2,5m b/d to US (100%) NATURAL GAS EXPORTS 2008: 3,6tcf to US (100%)		NATURAL GAS IMPORTS 2008: Canada 90%	NATURAL GAS IMPORTS 2008: Mozambique Namibia	NATURAL GAS EXPORTS 2010: EU 55% CIS 28% Non-EU Europe and Turkey 10% Asia 7%		LNG IMPORTS 2008: Qatar 75%	LNG IMPORTS 2010: Malaysia 19,9% Australia 19% Indonesia 18,3% Qatar 10,9%	LNG IMPORTS 2008: Qatar 32% Malaysia 23% Oman 17% Indonesia 11%	
			Renewables in TPES (Mtoe)	116,8	45,2	17,8	110,5	14,1	17,7	174,7	260,3	16,1	1,3
			Renewable energy (2008) ³⁸	Share of renewables (as a % of TPES)	5,1	16,9	9,9	44,5	10,5	2,6	28,1	12,2	3,2
	Renewables scoreboard (2011) Rank/score ³⁹	2/67		9/53	23/42	11/49	26/41		4/62	1/71	19/44	16/45	
	CO2 emissions (2008)	(Mt of CO2) ⁴⁰	5.595,9	550,9	408,3	364,6	337,4	1.593,8	1.427,6	6.550	1.151,1	501,3	
		% of global emissions ⁴¹	18,1	1,8	1,6	1,3	1,4	5,7	5,8	23,3	4	1,7	
% annual growth 2008-2035 ⁴²		0,3	0,5	1,7	2,7	(Africa) 1,8	0,2	2,7	2,6	-0,4	1		
Emissions/GDP (Kg CO2/2000 US\$) ⁴³		0,48	0,63	0,53	0,43	1,84	3,71	1,73	2,3	0,22	0,67		
Per capita (t CO2) ⁴⁴		18,3	16,5	3,8	1,9	6,9	11,2	1,2	4,9	9	10,3		
Per capita 2025 ⁴⁵		16,8	14,6	4,5	2,6		12,6	1,3	7,3	9,1			
Per capita 2035 ⁴⁶	16,2	14,8	5,5	3,1		14,4	1,5	9,2	9,1				
Production of selected critical raw materials (2008, 2009) as share of world total. ⁴⁷		Beryllium 85% Germanium 3%	Cobalt 11% Indium 9% Niobium 7% Tungsten 4%	Fluorspar 18%	Graphite 7% Niobium 92% Rare earths 1% Tantalum 16%	Antimony 2% Platinum 79%	Antimony 2% Germanium 4% Magnesium 7% Platinum 11% Tungsten 5%	Graphite 13% Rare earths 2%	Antimony 91% Beryllium 14% Fluorspar 59% Germanium 72% Graphite 72% Indium 58% Magnesium 56% Rare earths 97% Tungsten 78%	Indium 11%	Indium 9%		

EUROPEAN UNION STRATEGIC PARTNERS

Indicators

			The Americas			Africa	Europe	Asia					
			BRICS										
			United States	Canada	Mexico	Brazil	South Africa	Russia	India	China	Japan	South Korea	
Governance and Society	Human Development Index (2010) ⁴⁸	Rank	4	8	56	73	112	65	121	89	11	12	
	Legatum Prosperity Index (Rank) ⁴⁹	Overall Score	10	7	53	45	66	63	88	58	18	27	
		Governance	3	5	66	60	40	101	41	64	20	31	
		Education	9	12	69	75	78	38	89	59	24	8	
		Safety and Security	25	16	79	76	97	82	78	92	11	33	
Corruption Perceptions Index ⁵⁰	Rank	22	6	98	69	54	154	87	78	17	39		
GINI Index ⁵¹	Score (year)	40,8 (2000)	32,6 (2000)	48,1 (2006)	55 (2007)	57,8 (2000)	43,7 (2007)	36,8 (2005)	41,5 (2005)	31,9 (1998)	31,6 (2004)		
	Confidence in national government %	42	55	37	51	59	51	67		27	32		
Public Opinion	Gallup worldviews and global reports ⁵²	Approval of country leadership %	39	58	35	68	53	57	57		34	40	
		National economy getting better %	40	68	25	73	38	30	40	84	28	55	
		Standard of living improving %	51	60	47	72	34	31	44	78	23	48	
		Global warming quite serious or very serious threat %	55	74	94	95	71	49	83	32	77	83	
	Gallup worldviews and global reports ⁵²	Approval of UN leadership %	42	58		20	70	27	18		46	57	
		Approval of US leadership %		63	40	43	92	23	18		51	55	
		Approval of China's leadership %	22	25	31	18	47	27	8		29	36	
		Approval of Russia's leadership %	27	29	23	15	37		11		21	19	
		Defence Budget ⁵³	(\$) (2010)	698	22,8	5,4	33,5	4,5	58,7	41,3	119	54,5	27,6
		Defence Budget ⁵³	As a % of GDP (2010)	4,8	1,5	0,5	1,6	1,2	4	2,7	2,1	1	2,8
As a % of world total	43		1,4	0,33	2,1	0,27	3,6	2,5	7,3	3,3	1,7		
% change 2001-2010	81,3		51,8	39	29,6	22	82,4	54,3	189	-1,7	45,2		
Total Forces ⁵⁴	Active		1.580.255	65.722	267.506	327.710	62.082	1.027.000	1.325.000	2.285.000	230.300	687.000	
	Reserve	864.547	33.967	39.899	1.340.000	12.382	20.000.000	1.155.000	510.000	41.800	4.500.000		
	Paramilitary / Civilian Forces	11.035	4.554	36.500	395.000	15.071	449.000	2.288.407	660.000	12.250	4.500		
Military Interventions	Personnel contribution to UN Peace-keeping Operations/ Rank (2011) ⁵⁵	100/ 63	172/ 56	/	2.239/ 13	2.187/ 14	225/ 51	8.423/ 3	1.997/ 15	257/ 47	727/ 32		
	% of assessed contributions to UN peacekeeping budget (2011-12) ⁵⁶	27,17	3,21	0,47	0,32	0,07	1,98	0,1	3,94	12,53	2,26		
	Personnel deployed in non - UN Interventions ⁵⁷	188.107	2.871	0	0	488	3.900	0	0	0	0		
Other indicators	% of assessed contributions to the UN regular budget (2010) ⁵⁸		22	3,2	2,3	1,6	0,38	1,6	0,53	3,2	12,5	2,2	
	Voting cohesion with the EU at UN General Assembly (2009) ⁵⁹	Overall	56	78	65	54	56	56	43	54	89	87	
		Development and human rights	75	81	56	25	25	31	25	25	87	87	
		Security	82	100	63	63	73	54	27	54	/	73	
	Development assistance (\$ Mio) 2009 ⁶⁰		28.831	4.000	/	437 (2007)	816	200 (2008)	610	1.800-3.000 (2008)	9.469	581	
	IMF voting shares ⁶¹	March 2011	16,7	2,8	1,4	1,3	0,8	2,6	1,8	3,6	6	1,3	
		Post-2008 reform	16,7	2,5	1,4	1,7	0,7	2,3	2,3	3,8	6,2	1,3	
		Post-2010 reform	16,4	2,2	1,8	2,2	0,6	2,5	2,6	6	6,1	1,7	
Membership of main regional organisations		NATO, NAFTA, OAS, OECD, East Asia Summit	NATO, NAFTA, OAS, OECD	NAFTA, OAS, OECD	MERCOSUR, OAS, UNASUR	AU, SADC	SCO, CIS, CSTO, Council of Europe	SAARC, ASEM, East Asia Summit	SCO, ASEM, East Asia Summit	ASEM, East Asia Summit, OECD	ASEM, East Asia Summit, OECD		
Global Presence Index ⁶²		1.000	176	71,5	58	33,6	255	89,5	291	273	113		

- 1 World Population Prospects: the 2008 Revision, Department of Economic and Social Affairs, United Nations. Medium variant 2010-2050.
- 2 Ibid., Medium variant 2010-2050.
- 3 Ibid., Medium variant 2010-2050.
- 4 Bilateral Relations, Country Factsheets, DG Trade, European Commission, available at <http://ec.europa.eu/trade/creating-opportunities/bilateral-relations/countries-and-regions/> Data from: World Economic Outlook, International Monetary Fund. GDP measured at market rates.
- 5 Ibid.
- 6 The EU in the World – A Statistical Portrait, Eurostat, 2010. Data from: World Development Indicators 2009, The World Bank.
- 7 Op. Cit. in Note 4.
- 8 Op. Cit. in Note 4. Market exchange rates. Figures are in thousands.
- 9 World Economic Outlook, International Monetary Fund, April 2010. Market exchange rates.
- 10 World Economic Outlook, International Monetary Fund, April 2011. GDP, current prices.
- 11 U. Dadush and B. Stancil, The World Order in 2050, Carnegie Endowment for International Peace. Real GDP, 2005 US\$.
- 12 Data Template on International Reserves and Foreign Currency Liquidity, International Monetary Fund.
- 13 Chinese official warns on dollar assets, The Financial Times, 7 June 2011.
- 14 Op. Cit. in Note 4.
- 15 World Development Indicators, 2011, The World Bank.
- 16 Op. Cit. in Note 4.
- 17 Ibid.
- 18 Ibid.
- 19 United Nations Conference on Trade and Development statistics, available at <http://www.unctad.org/Templates/Page.asp?intItemID=1584&lang=1>
- 20 Ibid.
- 21 Op. Cit. in Note 4.
- 22 Ibid.
- 23 Op. Cit. in Note 19.
- 24 Ibid.
- 25 Op. Cit. in Note 4.
- 26 Ibid.
- 27 2011 Global R&D Funding Forecast, R&D Magazine, December 2010.
- 28 Ibid.
- 29 United Nations Educational, Scientific and Cultural Organisation (UNESCO), Institute for Statistics.
- 30 K. Schwab, The Global Competitiveness Report 2011-2012, World Economic Forum, 2011.
- 31 Global Innovation Index 2009-2010, Confederation of Indian Industry and INSEAD Business School, 2010. This index encompasses both innovation enablers, such as ICT infrastructure and market sophistication, and the scientific and creative outputs of innovation.
- 32 Ibid. Human capacity includes indicators related to education institutions and innovation potential.
- 33 S. Dutta, I. Mia, Global Information Technology Report 2010-2011, World Economic Forum and INSEAD Business School, 2011. The network readiness index measures the degree to which countries leverage ICT for enhanced competitiveness.
- 34 Key World Energy Statistics 2010, International Energy Agency, 2010.
- 35 Ibid.
- 36 Ibid. The total primary energy supply (TPES) is made up of production + imports – exports – international marine bunkers – international aviation bunkers +/- stock changes.
- 37 US Energy Information Administration, Country Analysis Briefs. The information provided here does not aim to be exhaustive but to provide a selection of the most relevant data.
- 38 Renewables Information, Interantional Energy Agency, 2010. Renewables include here: hydroelectricity, geothermal, solar photovoltaic, solar thermal, tide, wave, ocean, wind, solid biomass, biogas, liquid biomass and renewable municipal waste.
- 39 Renewable energy country attractiveness indices, Ernst&Young, Issue 30, August 2011. The All Renewables Index reported here, and updated quarterly, provides an overall score for all renewable energy technologies, combining them as follows: wind index (68%), solar index (15%) and biomass and other resources index (17%).
- 40 Op. Cit. in Note 34. Figures only include emissions from fossil fuel combustion.
- 41 Millennium Development Goals Indicators, UN Statistical Division.
- 42 International Energy Outlook 2011, US Energy Information Administration, 2011. Reference case.
- 43 Op. Cit. in Note 34. GDP at market exchange rates.
- 44 Op. Cit. in Note 34.
- 45 International Energy Outlook 2010, US Energy Information Administration, 2010.
- 46 Ibid.
- 47 Tackling the challenges in commodity markets and on raw materials, European Commission, COM(2011) 25 final, 2 February 2011.
- 48 Human Development Report 2010, The Real Wealth of Nations: Pathways to Human Development, UN Development Programme, 2010.
- 49 The 2010 Legatum Prosperity Index: An Inquiry into Global Wealth and Well Being, Legatum Institute, 2010. The Prosperity Index produces rankings based on those factors that will help drive economic growth and produce happy citizens in the long term.
- 50 Corruption Perceptions Index 2010, Transparency International, 2010.
- 51 International Human Development Indicators, UN Development Programme. The Gini coefficient measures the degree of inequality in the distribution of family income in a country. A value of 0 represents absolute equality; a value of 100 absolute inequality.
- 52 Data drawn from Gallup Worldview and Gallup Global Reports, available at <https://worldview.gallup.com/signin/login.aspx?ReturnUrl=%2f> and at <http://www.gallup.com/poll/128210/gallup-global-reports.aspx> respectively. Most figures reported here date from 2010, a few from 2009. A deeper analysis of each indicator would require the consultation of the original source. In particular, the shares of non-respondents are not reported here, but can be very high. Likewise, only approval rates are featured, which should be complemented by an appraisal of rates of disapproval. The question on the seriousness of global warming was put only to those who stated they knew of the challenge.
- 53 SIPRI Yearbook 2011, Oxford University Press on behalf of the Stockholm International Peace Resource Institute, 2011.
- 54 The Military Balance, International Institute for Strategic Studies, 2010. EU figures, reported in separate country briefs, include police forces with military status such as Carabinieri, Gendarmerie and Guardia Civil. See D. Keohane and C. Blommesteijn, 'Strength in numbers? Comparing EU military capabilities in 2009 with 1999', EUISS Policy Brief, December 2009.
- 55 Ranking of Military and Police Contributions to UN Operations, UN Factsheet, July 2011.
- 56 Effective rates of assessment for peacekeeping operations, 1 January 2010 to 31 December 2012, Annex IV to UN General Assembly Doc. A/64/220, 23 September 2009.
- 57 Data from The Military Balance Op. Cit. in Note 54 as reported in Ramses 2011. Un monde post-américain?, Institut français des relations internationales, 2010.
- 58 Assessment of Member States' advances to the Working Capital Fund for the biennium 2010-2011 and contributions to the United Nations regular budget for 2010, UN Secretariat, ST/ADM/SER.B/789, 24 December 2009.
- 59 T. Renard and B. Hooijmaaijers, Assessing the EU's Strategic Partnerships in the UN System, Security Policy Brief 24, Egmont Institute, May 2011.
- 60 OECD statistics and, for non-OECD countries, estimates from World Development Indicators 2011, The World Bank, 2011.
- 61 Quote and Voting Shares Before and After Implementation of Reforms Agreed in 2008 and 2010, IMF factsheet, available at <http://www.imf.org/external/np/sec/pr/2011/pdfs/quotatbl.pdf>
- 62 Elcano Global Presence Index 2010, Real Instituto Elcano, 2011. This index quantifies the external projection of a country in a variety of domains and aggregates the results.

List of Abbreviations

ASEM – Asia Europe Meeting

AU – African Union

BRICS – Brazil, Russia, India, China, South Africa

CETA – Comprehensive Economic and Trade Agreement

CIS – Commonwealth of Independent States

CSTO – Collective Security Treaty Organisation

EAS – East Asia Summit

EU – European Union

FDI – Foreign Direct Investment

FTA – Free Trade Agreement

GDP – Gross Domestic Product

GERD – Gross domestic Expenditure on Research and Development

IBSA – India, Brazil, South Africa

IMF – International Monetary Fund

LNG – Liquefied Natural Gas

MERCOSUR – Mercado Común del Sur/do Sul

NAFTA – North American Free Trade Area

NATO – North Atlantic Treaty Organisation

OAS – Organisation of American States

OECD – Organisation for Economic Cooperation and Development

PCA – Partnership and Cooperation Agreement

PPP – Purchasing Power Parity

SAARC – South Asian Association for Regional Cooperation

SADC – South African Development Community

SCO – Shanghai Cooperation Organisation

TPES – Total Primary Energy Supply

UNASUR – Union of South American Nations

UN – United Nations

UNSC – United Nations Security Council

US – United States of America

WTO – World Trade Organisation

FRIDE
— A EUROPEAN —
THINK TANK FOR GLOBAL ACTION
•