SUMMARY
The last two weeks – the period over which this survey was conducted – have been a rollercoaster ride for the Doha Round negotiators. It is easy to see how participants in our poll could have been optimistic one day and pessimistic the next. As we tabulate the poll results the current picture from Geneva is far from clear. Notwithstanding those qualifications, our survey results show some unmistakable patterns.

It sounds like a “no-brainer” but 98% of respondents agreed that progress on industrial market access and services trade would not be possible without demonstrable progress on agriculture prior to Hong Kong. Eighty-eight percent of respondents credited the American proposals with breathing new life into the Round, with nearly two-thirds of poll participants accepting as realistic United States goals with respect to cuts in domestic supports.

Interestingly, only a minority (19%) think that “sensitive products” can be limited to just 1 percent of tariff lines in the agricultural market access negotiations. There is an even split among respondents (42% each way and 16% undecided) on the question of whether all forms of agricultural export subsidies and practices with equivalent effect can be eliminated by 2010.

Somewhat surprisingly, just over a quarter of our respondents (26%) are convinced at this stage that the outcome of the Doha Round’s industrial tariff negotiations is likely to be more ambitious than the Uruguay Round results.

Finally, while Geneva-based respondents differ widely from their capital-based counterparts on this point, an overall majority of 58% of poll participants believe that a failed Ministerial Conference in Hong Kong would likely doom the Doha Round.

The poll was conducted over slightly more than two weeks in October and included more than 100 respondents comprised of negotiators, policy-makers and experts from both developed and developing countries located in Geneva and key capital cities around the world.

RESULTS

The Importance of Success in Hong Kong
While 58% of those surveyed worry that a failure in Hong Kong would doom the Doha Round, this majority was influenced strongly by capitals-based representatives where 67% of respondents held this view compared to 46% of Geneva representatives. An almost equal number of Geneva respondents (42%) do not agree that the fate of the Round is tied to success in Hong Kong (the comparable figure for capitals in 29%).

As Usual, Agriculture is the Linchpin
98% of all participants in the poll agree that without demonstrable progress on agriculture ahead of Hong Kong, it will not be possible to reach agreement on approaches to industrial market access and trade in
Agriculture – The Devil is in the Details

Not everyone agrees, however, that the U.S. proposals are realistic. On domestic supports, 64% overall believe it is realistic to look for cuts of 60 percent in amber box supports and limit blue box payments to 2.5% of production, but capitals (77%) and Geneva (54%) diverged importantly on this point. Interestingly, only 12% of all respondents are already convinced that this goal is unrealistic, with the rest waiting to be convinced.

There is a real concern among respondents that provisions for “sensitive” products and “special” agricultural products will seriously undercut the potential for the market access side of the negotiations to deliver real results. Sixty-one percent of all respondents (71% Geneva / 53% Capitals) expressed doubt that “sensitive” products can be limited to just 1 percent of tariff lines with compensatory modifications to TRQ in-quota amounts. A majority of 54% (46% Geneva / 65% Capitals) agreed with the proposition that developing country demands for more flexible, less-liberalising treatment for large numbers of “special” agricultural products will undercut potential gains in market access. Twenty-two percent disagree and the rest are waiting to make up their minds.

When asked whether it is likely that all forms of agricultural export subsidies and practices with equivalent effect can be eliminated by 2010, overall respondents split evenly (42% to 42%) on being willing now to say this is likely, but again, there were wide differences between the Capitals-based response (53%) and Geneva (29%). There are a substantial number of people in the “wait and see” camp.

(More)

Next Steps for Trade in Services

With Geneva and Capitals-based respondents in rough agreement, more than 2/3 of respondents (71%) said that in Hong Kong we should be looking to set a new target (perhaps 31 March) by which time all Members should be required to table initial and/or improved offers in services trade.

A Reasonably Good Outlook for Rules Negotiations

Clear majorities of respondents (52% overall, 63% Capitals and 51% Geneva) agreed that there would be a clear commitment in Hong Kong to work towards achieving a comprehensive text in all areas of the Rules Negotiating Group. Given other comments, we need to assume this is based on an expectation for prior forward movement in agriculture. Geneva reps are more sceptical than Capitals-based officials, however, with 42% of Geneva reps doubting clear sailing for “Rules” compared to just 18% of Capitals-based reps that hold this view.

And a Hazy View for Industrial Market Access Outcomes

Of all the areas in this survey, this is where we recorded the greatest uncertainty. A plurality of 42% of all respondents, heavily influenced by the Geneva-based respondents, feel that they cannot say at this stage whether or not the Doha Round will produce an outcome for market access on industrial goods that would be “significantly more liberalising than the result of the Uruguay Round”. Of those willing to take a clear position, slightly more (31%) doubted an ambitious outcome than thought a more liberalising outcome likely (27%).

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