

# Results of the Special Agricultural Frameworks Survey (GTOP)

Opinion survey undertaken as part of the research project into the viability of alternative frameworks for agricultural trade negotiations funded by the Rural Industries Research and Development Corporation and the Australian Centre for International Agricultural Research

## Scope of Survey

- Total number of respondents = 157
  - 126 from original IIT GTOP & individual experts
  - 26 from CCAP poll of Chinese experts
  - 5 independent volunteers from India and Brazil
- Survey conducted in September / October 2008

## Methodology

- Reactions to 14 propositions
- Response chosen from 6 possibilities
  - (1) Likely to be true
  - (2) Reasonably likely to be true
  - (3) 50-50 / Hard to say
  - (4) Doubtful
  - (5) Extremely unlikely
  - No Opinion
- Responses from (1) + (2) and (4) + (5) totalled together for “Likely” and “Unlikely”

## Principal Findings Relevant to Project

- Most are unwilling to ignore agriculture in trade negotiations even if it accounts for just 8 % of trade.
- Most believe complex modalities are necessary and a large majority sees Doha carve-outs and special provisions lasting long after Doha in the system.

## Principal Findings (Continued)

- Only a minority seem unwilling to try critical mass as an approach for agriculture, but
- There is no clear view on the potential value of a single modality applying to both developed and developing countries.



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# Detailed Results

( A ) If the negotiations had not broken down as a result of the special safeguard mechanism, **there were many other open issues** that were so difficult that they would surely have led to a breakdown in the talks.



Respondents	Likely	Unlikely
Overall Survey	56	23
Capitals-based*	48	32
Geneva-based	59	18
China (CCAP)	77	4
India / Brazil**	40	40

( B ) Although further compromises will be needed to bridge the differences revealed at the end of July, the US **Congress will make the necessary cuts** in the farm supports adopted in the 2008 Farm Bill in order to ratify an eventual agreement.



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Respondents	Likely	Unlikely
Overall Survey	50	34
Capitals-based*	56	28
Geneva-based	35	47
China (CCAP)	73	19
India / Brazil**	nil	60

( C ) The deal on the table at the end of July in Geneva embodied a "comparably high level of ambition" in agricultural and NAMA market access.



Respondents	Likely	Unlikely
Overall Survey	34	34
Capitals-based*	28	44
Geneva-based	35	29
China (CCAP)	54	8
India / Brazil**	20	60

( D ) The goal of a "comparably high level of ambition" across goods sectors is a standard **that helps to ensure consensus** in WTO negotiations



Respondents	Likely	Unlikely
Overall Survey	38	43
Capitals-based*	52	36
Geneva-based	29	59
China (CCAP)	15	35
India / Brazil**	40	20

( E ) Although we don't have all the details, EC and US offers to expand TRQ access under the 'sensitive' product provisions **deliver on the Doha Round's promise** of “substantial improvement in market access”



Respondents	Likely	Unlikely
Overall Survey	41	24
Capitals-based*	36	32
Geneva-based	53	12
China (CCAP)	39	23
India / Brazil**	20	40

( F ) A **complex modalities** agreement such as the 100+ pages on the table in July, and the difficult implementation task it implies, **is unavoidable** to achieve agricultural trade reforms.



Respondents	Likely	Unlikely
Overall Survey	57	32
Capitals-based*	52	40
Geneva-based	65	29
China (CCAP)	54	23
India / Brazil**	80	Nil

( G ) **There is little risk** that the ‘status’ exceptions for classes of WTO Members, the ‘special’ and ‘sensitive’ product exceptions, the Special Safeguard Mechanism or the Special Agricultural Safeguard **will continue** beyond the implementation period of a Doha agreement.



Respondents	Likely	Unlikely
Overall Survey	21	61
Capitals-based*	4	77
Geneva-based	12	62
China (CCAP)	89	11
India / Brazil**	20	60

( H ) Apart from Brazil and Argentina, the **developing leadership of WTO has little interest** in the ‘substantial improvement’ of market access in agriculture given their rate of macro-economic growth and political economy problems that agricultural liberalization implies for them.



Respondents	Likely	Unlikely
Overall Survey	54	34
Capitals-based*	68	16
Geneva-based	41	59
China (CCAP)	27	42
India / Brazil**	100	nil

(I) The US's offer to cut recent growth in its domestic supports and the EC's offer to lock in the CAP reform decisions it took in 2003 **should have been attractive enough** for the developing country leadership to agree to more substantial cuts in their own agricultural barriers.



Respondents	Likely	Unlikely
Overall Survey	34	42
Capitals-based*	36	44
Geneva-based	35	41
China (CCAP)	35	27
India / Brazil**	Nil	100

( J ) ‘Critical mass’ agreements among countries accounting for a high proportion of trade in a product or sector—similar to the International Technology Agreement—are a practical possibility for the future liberalization of agricultural markets.



Respondents	Likely	Unlikely
Overall Survey	52	30
Capitals-based*	48	36
Geneva-based	47	35
China (CCAP)	69	4
India / Brazil**	60	20

( K ) Large-scale, reciprocal ‘free trade’ agreements such as NAFTA-EC, combined with duty-free/quota-free arrangements for least-developed countries, **are a potential way forward** for ambitious trade reform.



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Respondents	Likely	Unlikely
Overall Survey	47	41
Capitals-based*	44	36
Geneva-based	35	65
China (CCAP)	77	15
India / Brazil**	60	20

( L ) Although the protection of agricultural markets accounts for almost two thirds of welfare losses from the protection of goods markets, agriculture represents only 8% of goods trade and production. WTO Members should **leave their longstanding differences in the sector to diminish as their economies grow** and turn their attention, instead, to bigger ‘prizes’ in trade facilitation and the liberalization of labour and investment markets.

Respondents	Likely	Unlikely
Overall Survey	38	42
Capitals-based*	52	36
Geneva-based	35	47
China (CCAP)	8	42
India / Brazil**	20	80

( M ) The value of ‘core’ WTO services, for example, its role as a forum for Trade Policy Reviews; as an enforceable framework of basic trade principles, and; to coordinate technical assistance such as ‘Aid for Trade’, **will not be compromised whatever happens** to the Doha Round negotiations.



Respondents	Likely	Unlikely
Overall Survey	49	33
Capitals-based*	48	44
Geneva-based	47	24
China (CCAP)	54	23
India / Brazil**	60	20

( N ) In a future negotiation, greater parity between developed and developing countries' liberalization commitments would be facilitated if agricultural and industrial tariffs and other market access issues were **subject to a single 'modality'** that cut high industrial country agricultural protection in step with cuts to high developing country protection of NAMA products



Respondents	Likely	Unlikely
Overall Survey	41	37
Capitals-based*	44	40
Geneva-based	35	35
China (CCAP)	42	31
India / Brazil**	60	40

## ...and finally, as Ministers go to Geneva,

- A clear majority (and by a ratio of 2:1) respondents believe that many other open issues apart from the SSM question would surely have led to a breakdown in the talks last July.
- Is the situation markedly improved in December?