GLOBAL TRADE OPINION POLL
SURVEY No.7 (23 February 2004)

SUMMARY

In the latest survey, most the respondents felt that USTR Zoellick’s January 11 letter to Trade Ministers provided important impetus to the stalled Doh Round negotiations. That said, a very sceptical attitude continues to prevail in respect of whether real progress is possible in 2004 on the difficult agricultural and non-agricultural market access negotiating frameworks. It seems Washington has a job to do convincing others of its sincerity since a substantial majority of all respondents doubt the United States will agree in this round to big reductions in domestic support for agriculture.

While many poll participants are wary of its potential to divert discussion away from substantive negotiations, three-quarters of respondents see a Sixth WTO Ministerial Conference in 2004 – perhaps because nearly all agree that a decision will need to be taken this year to extend the Doha Round.

On non-Round issues, China fared reasonably well on perceptions of its progress to date in meeting its WTO obligations. Only a relatively small minority see Saudi Arabia completing its WTO accession process by mid-2004.

The poll was conducted in the 7-18 February 2004 period and included more than 100 participants comprised of negotiators, policy-makers and experts located in Geneva and key capital cities around the world. The Institute’s next poll will be conducted in the second half of April.

RESULTS

Doha Round Timetable: Ninety-one percent of respondents agree that WTO Members will need to decide this year to extent the Doha Round timetable at least until some date in 2005, with a sizeable number of poll participants volunteering their view that the extension might need to be until 2006 or later.

USTR Initiative Helpful: 61 percent of those polled thought USTR Zoellick’s January letter was helpful in injecting new life into the Round, while another 23 percent adopted a more “want and see” attitude. Only 14 percent thought the letter and change in position did not help move the Round forward.

UNCTAD XI Unhelpful: A much different attitude prevailed in the case of the UNCTAD XI meeting coming up this June. Overall, 64 percent of respondents see the meeting as working against progress in the Doha Round. Just 9 percent of capitals-based respondents and 18 percent of Geneva respondents think this meeting will advance the Doha agenda.
**Agriculture and NAMA Frameworks:** Few think early progress will be possible in the key areas of agriculture and non-agricultural market access (NAMA). Just 16 percent of respondents see agreement on agricultural and NAMA negotiating frameworks by mid-2004, while 57 percent doubt this will be possible. Capitals are more negative than Geneva negotiators, however, with just 9 percent of capitals-based respondents believing agreement is possible in the timeframe compared to 23 percent of Geneva officials.

**Cutting Domestic Support in the USA:** Scepticism on the frameworks may result from the fact that, overall, just 21 percent believe the USA is serious about cutting domestic support for agriculture, compared to 59 percent that doubt this. Here, Geneva-based officials are the most negative, with just 9 percent holding the view that Washington is prepared to negotiate deep cuts in agricultural supports.

**A Ministerial Conference in 2004:** Bob Zoellick called for a Ministerial in his letter and most people seem to be buying in on the idea. 73 percent of all respondents (Geneva and capitals were in full agreement with each other) think there will be a Ministerial Conference, compared to just 14 percent who doubt a meeting will be held.

**Trade Facilitation Negotiations:** While this seems to be the “Singapore issue” will the greatest chances for success in the future, people aren’t yet fully on board with negotiations. Fifty percent of all respondents think a negotiation will be agreed in 2004, but 41 percent of those in Geneva give agreement on negotiations this year just a 50-50 chance and 23 percent of capitals-based poll participants doubt a negotiation can be agreed in 2004.

**DSU Negotiations and the Single Undertaking:** It wasn’t supposed to be this way, but 82 percent of all respondents and 91 percent of those in Geneva now believe that it will not be possible to finish the negotiations on clarifying and improving the DSU outside the scope of the overall timetable for the Round.

**Other (Non-Round) Issues**

**China WTO Implementation Scorecard:** After its first two years of WTO implementation, China appears to be doing reasonably well. Twenty-five percent agreed that China had made satisfactory progress, compared to 23 percent who disagreed. A plurality of respondents (43 percent) held a 50-50 view of China’s performance to date, giving China credit for progress in some areas and suggesting the need for further improvement in others.

**Saudi Arabian Accession:** Saudi Arabia’s WTO accession does not appear to be “just around the corner”. Only 23 percent of all respondents and just 18 percent of Geneva respondents believe that the Kingdom’s accession process will be completed by mid-year.