SUMMARY

There’s good news and bad news in this latest poll. Most of our survey population believes that the Doha Round will eventually succeed, even if we are likely to require an extension of time for the negotiations. That’s the good news. The bad news is that there is a surprising lack of consensus on the best way to move the talks forward. Only a plurality see the Derbez text as the best basis for building on work done to date and delegates and experts are split down the middle on their expectations for how the negotiations will be organized in 2004. In the short term, a slight majority of those polled see at least a fifty-fifty chance of a procedural success at the mid-December meeting, so that could at least maintain some momentum in the talks. Changing negotiating group chairs is not seen as helpful by most.

After Cancun, many expected the dissolution of the G-[21] [X] Group, but it now looks like a longer term phenomenon. It’s generally agreed that the cotton issue cannot be addressed outside of the context of the agriculture reform negotiations.

The most negative signals in this poll were those related to progress in the agriculture talks and the on-going TRIPS and Health issue. Less than 20 percent see prospects of reaching agreement on a framework for the agriculture talks within the first quarter of 2004. Two-thirds of respondents think it’s going to be difficult to translate the TRIPS and Health deal into an amendment of the TRIPS Agreement.

Slightly over 100 negotiators, policy-makers and experts located in Geneva and ten key capital cities took part in this sixth Institute poll. Our next poll will be conducted in early February, 2004.

Results

This Round won’t fail: Notwithstanding current confusion over the next steps in the Doha Round and gloomy prospects for real forward movement in 2004, the vast majority of those surveyed agreed that this will not be the first WTO/GATT round to fail. Overall, two thirds of respondents believe the Round will eventually succeed compared to just over 20 percent who fear failure.

Prospects for mid-December: Fifty-six percent of respondents feel there is at least a 50-50 or better chance that the mid-December Geneva meeting can put the Round back on track procedurally, even if few think substantive progress is in the offing. That said, Geneva-based participants in the poll are much more negative on the prospects for this month than those in capitals, with almost half of those responding indicating a successful outcome to the meeting is unlikely.
**Derbez text favoured – but just barely:** A plurality of those surveyed (46%) believe that the negotiations should be pursued building upon the Derbez (Cancun) text, with 55% of capital-based respondents holding this view. 28% of Geneva-based participants think that something other than the Derbez text should serve as the basis for continued work.

**Two-plus-two for Singapore issues:** Sixty-five percent of all surveyed think that investment and competition should be dealt with outside of the single undertaking while trade facilitation and transparency in government procurement could be a part of the Doha negotiations package. 25% of Geneva respondents and 18% of capital-based respondents disagree with the idea that a 2-plus-2 approach could work.

**G-21 / G-[X] here to stay:** Overall, sixty-five percent of those polled think that the G-[X] will still be a force to be reckoned with on agriculture at the end of next year. This view is more strongly held in capitals (73%) than in Geneva (57%). Less than a quarter of respondents see the G-[X] as a passing phenomenon.

**Cotton:** There is no doubt about it: 82 percent of all surveyed think cotton can only be dealt with in the context of the overall agricultural reform negotiations. Only six percent of respondents affirmatively disagreed with this proposition.

**Gloomy outlook for agriculture:** Just 18 percent of respondents think it will be possible to reach agreement within the next four months on a framework for establishing modalities for the agriculture negotiations. 57 percent of the total see agreement as unlikely (64% of capitals-based poll participants hold this view).

**What’s in store for 2004?** Respondents are split down the middle on how things will proceed in Geneva next year. 36 percent of Geneva respondents think we will see a continuation of a General Council Chairman-led process focused on the current four topics and 36 percent disagree with this, with 28 percent undecided. Overall, 41% of respondents see a chair-led four issues process in 2004.

**Changing Chairs won’t be helpful:** Respondents disagreed with the idea that the prospects for the negotiations would be improved by changing negotiating group chairmen. Overall, 57% felt changing chairs would not help, versus less than 30 percent who thought it was a good idea. Two-thirds of capitals-based reps thought it would not be helpful to change chairmen at this stage.

**More trouble in store on TRIPS and Health:** Two-thirds of all respondents think it is going to be difficult to convert the TRIPS and Health deal into an amendment of the TRIPS agreement, with just 16% of the total survey population seeing clear sailing on this issue. Geneva-based reps are more prone to see problems (75%) than those in capitals (53%).

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