SUMMARY

In a dramatic change from our February poll, a small plurality of survey participants now believe it will prove possible to reach agreement on an agriculture framework by the Geneva summer break. If agriculture sees sufficient forward movement, then non-agricultural market access, trade facilitation, cotton and trade in services are expected by most respondents to see positive movement as well.

By a large majority, respondents in the current poll agree that the Doha Round target for July should not be a Derbez text rev. 3, but rather shared understandings on how to progress the four areas that have been the central focus of discussion since the Cancun meeting.

Geneva-based participants in the latest poll are generally expecting the coming Paris meetings to give positive impetus to the Doha Round, but capitals-based respondents hold a more cynical view of the meetings’ likely outcome.

Most people think the agriculture negotiations will be hurt in the short-term by the rumored American loss to Brazil in the cotton subsidy dispute. They also think that the EU position on negotiations on the Singapore Issues remains unclear.

The poll was conducted in late April and early May and included more than 100 respondents 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 at the beginning of July.

RESULTS

High-level Paris Meetings: More than half (53%) of Geneva respondents believe that the forthcoming meetings in Paris are likely to impart positive momentum to the Round, compared to just 24 percent of capitals-based participants in the poll.

Impact of Cotton Subsidy Dispute: Fifty-seven percent of the survey population thinks the reported American loss in the cotton subsidy dispute with Brazil will have an unhelpful near-term effect on the agriculture negotiations. Another 32 percent think it’s hard to judge whether the impact will be positive or negative.

Likelihood of Agriculture Breakthrough by July: Forty percent of all those answering the survey think agreement on an agriculture framework is likely by July, compared to thirty percent that doubt agreement in that timeframe will be possible. Here, it is important to note that just 16 percent of respondents to our February poll believed there would be a positive result on agriculture by mid-2004.
**Cotton Negotiating Framework:** Seventy-nine percent of all respondents agreed that West African countries concerned over cotton will agree that the issue should be folded into the agriculture framework if a framework agreement is reached by the time of the Geneva summer break.

**EU Position on Singapore Issues:** Nearly two-thirds (64%) of all respondents continue to feel that the EU position on Singapore issues negotiations has not been finally clarified. Some added the observation that the position of Commissioner Lamy is not the same as that espoused on the ground.

**Non-Agricultural Market Access:** A very large majority (81 percent) of respondents feel that agreement on a framework for non-agricultural market access is possible by mid-summer in Geneva, provided that a framework can also be agreed on agriculture by that time.

**Trade Facilitation Outlook:** Eighty-three percent of those participating in the survey thought a consensus to begin negotiations on trade facilitation will be reached by July, provided that there is acceptable progress in agriculture and non-agricultural market access. Just three percent of Geneva-based respondents doubt that such an agreement will be possible.

**Services Negotiations:** There is no consensus on the underlying reasons for the failure of most Doha Round participants to table services offers or the relatively poor quality of many of the offers now on the table. Thirty-eight percent of survey respondents attribute the current situation to factors external to the GATS Round, 28 percent feel the reasons are internal to the services negotiations and the remaining 34 percent are unable to decide one way or the other.

**Mid-2004 Objective Not Derbez Rev 3:** Slightly more than 68 percent of those responding to the survey agreed with the proposition that the target objective for mid-2004 should be agreement on how to move forward on the four core issues that have been the focus of the post-Cancun discussions and not an overall text (Derbez, rev.3). Just 12 percent of respondents believed an overall Derbez-type text should be the objective for July.

**The “Never Say Die” Club:** Asked whether failure to reach agreement on a framework for agriculture by mid-year 2004 would be a fatal blow for the Doha Round, close to 60 percent of all respondents and seventy-seven percent of capitals-based officials predicted that even in the face of such a setback, the Round would struggle on to an eventual conclusion. More than one survey participant was moved to observe that the WTO is the ultimate “never say die club”.

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