

## **EPA NEGOTIATIONS IN THE CARIBBEAN REGION: SOME ISSUES OF CONCERN**

### **SYNOPSIS**

**This Analytical Note explores some of the main challenges related to the EPA negotiations in the CARIFORUM ACP region, particularly with respect to Market Access and regional integration, Agriculture, Manufacturing, and trade in Services. This note highlights some of the region's main concerns and explores some possible positive linkages between the EPAs and the WTO Doha Round of negotiations in an effort to increase negotiators' understanding about the EPA developmental implications.**

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## EXECUTIVE SUMMARY

1. The CARIFORUM region, which concluded an Economic Partnership Agreement (EPA) with the EU on 16 December 2007, comprises fifteen countries, mostly small island states, which participate to a number of regional economic integration processes (RECs), the most important of which are the Caribbean Community and Common Market (CARICOM) and the Organization of Eastern Caribbean States (OECS).
2. The Caribbean Regional Negotiating Machinery (CRNM), whose Director-General had been appointed as EPA's Principal Negotiator, conducted the negotiations with the EU and was assisted by The CARICOM and the OECS secretariats. A Regional Preparatory Task Force (RPTF) completes the negotiating structure, and establishes a link between trade, aid and developmental needs arising from the EPA.
3. The CARIFORUM economy is scarcely diversified and characterized by vulnerability to natural phenomena, especially climate change and sea-level rise. Agriculture accounts for around 11% of regional GDP but its importance at the national level varies considerably, while industrial activities represent 24% of the regional GDP. Services are the most important component of the CARIFORUM economy, accounting for 64.5% of the regional GDP. With the exception of the agricultural production, where the employment importance of the sector outweighs its contribution to the national GDPs, the employment and GDP by sector data show no major discrepancies.
4. While on the one hand, the Dominican Republic and Trinidad & Tobago account for more than half of the region's economy, on the other hand Dominica is the smallest economy in the region, with a GDP of US\$299,8 million. The relatively high GDP per capita and Human Development Index (HDI) of the region as well as the presence of only one Least Developed Country (LDC), makes this region unique among the other ACP EPA regions. This also explains the region's better negotiating preparedness and better articulation of its commercial interests in the EPA, which contributed eventually to the signature of a full agreement before the end of 2007.
5. As most other EPA regions, CARIFORUM economies are very trade-dependent. However, contrary to African EPA regions, it is the United States, and not the EU, which represent the region's main trading partner (54.6% of the region's exports and 38% of imports). The EU remains, however, the region's second main trading partner (11.2% of the exports and 5.8% of imports). Intra-regional trade, while underdeveloped (about 6% of the region's trade), is remarkably high if compared to other ACP regions.

6. It is not clear whether the conclusion of the EPA, a reciprocal free trade agreement with the EU, will help the region diversify and increase its exports as originally intended. The agricultural sector faces multiple challenges related to a generalized decrease in agricultural productivity and output, the region's exposure to hurricanes, the erosion of preferences, and the denunciation of the EU protocols on bananas, sugar and rum. In addition, both agricultural and manufacturing producers lack the economies of scale to attain global competitiveness.

7. Services, as the major contributor to GDP in the CARIFORUM region, and particularly tourism, look increasingly promising. Nonetheless, some fear that liberalisation towards the EU under the EPA could threaten a sector of the economy that is at its early stages of development. Moreover, there are concerns over the region's limited domestic regulatory capacity.

8. All in all, the implementation of the recently concluded Caribbean EPA will entail many challenges for the region. Given the region's regulatory and productive limited capacity, great attention will need to be given to the contents of the development chapter and to the measures that will accompany the liberalisation of vulnerable sectors - especially agriculture, where, in addition to productivity concerns, difficulties could be foreseen in relation to the denunciation of the sugar, bananas and rum protocols.

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## EPA NEGOTIATIONS IN THE CARIBBEAN REGION: SOME ISSUES OF CONCERN

### I. INTRODUCTION

9. The CARIFORUM region negotiating an Economic Partnership Agreement (EPA) with the EU is composed of fifteen Caribbean countries: Antigua and Barbuda, Bahamas, Barbados, Belize, Dominica, Dominican Republic, Grenada, Guyana, Haiti, Jamaica, St. Kitts and Nevis, St. Lucia, St. Vincent and Grenadines, Suriname, Trinidad and Tobago. These fifteen countries are part of the Caribbean Forum of ACP states (CARIFORUM). The CARIFORUM was created in 1992 for the purpose of coordinating and monitoring the delivery and planning of European Development Fund (EDF) resources to the region.<sup>1</sup>

10. The region has a cumulated market size of around 24,9 million people and an average annual population growth of 0.82% (2005). The regional GDP is US\$81.4 billion with an average GDP per capita of US\$8,687. The Dominican Republic and Trinidad & Tobago are the bigger economies and make up for 56% of the CARIFORUM region GDP. Dominica is the smallest economy in the region, with a GDP of US\$299.8 million. Only one country, Haiti, is a LDC – a feature that clearly differentiates the Caribbean EPA region from other ACP EPA regions. Moreover, the presence of only one LDC add to the complexity of the commercial stakes related to EPA negotiations since the region's countries would not be eligible for alternative trade preferences schemes, such as the EU's LDC-only Everything But Arms (EBA) initiative.

11. This note describes the main trade and institutional patterns that characterise the region and explores some of the main trade challenges it faces in the EPA negotiations. It highlights the region's interests in the EPAs and aims at increasing negotiators' understanding about developmental implications that result from some of the interfaces between both processes.

### II. IDENTITY OF THE EPA CARIBBEAN REGION

12. The Caribbean Economic Partnership Agreement (EPA) negotiations were launched in April 2004 through the agreement of a Plan and Schedule for

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<sup>1</sup> Since 2001, Cuba is a member of the CARIFORUM too, but it did not sign the Cotonou partnership agreement and is therefore not involved in the EPA negotiations. The present note will refer to CARIFORUM as the CARIFORUM states minus Cuba.

CARIFORUM – EC Negotiations of an Economic Partnership Agreement.<sup>2</sup> This section analyses the configuration of the Caribbean EPA region and its institutional organisation for the purposes of negotiating an EPA. It is completed by a brief overview of the region’s economic, trade and productive profile.

A. General Overview: overlapping membership to RECs

13. As it is the case for other African Caribbean Pacific (ACP) regions<sup>3</sup>, the Caribbean EPA region is composed of countries participating to several regional economic communities (RECs).

14. The CARIFORUM membership overlaps with the Caribbean Community and Common Market (CARICOM), which, however, does not encompass the Dominican Republic. Since January 1991, CARICOM countries have applied the CARICOM Common External Tariff (CET) to imports from non-CARICOM members. Imports originating in one CARICOM state and entering other CARICOM members are duty free, although each member is allowed to impose import duties on imports of scheduled products from other members.<sup>4</sup> A four-phase schedule of CET tariff reductions was established at the outset, starting in 1993. The final Phase IV of full implementation, with a tariff ceiling of 20% for non-exempt industrial goods, and 40% for non-exempt agricultural goods, was to have been reached by members on 1 January 1998. Only a limited number of CARICOM countries have entered Phase IV of full implementation.

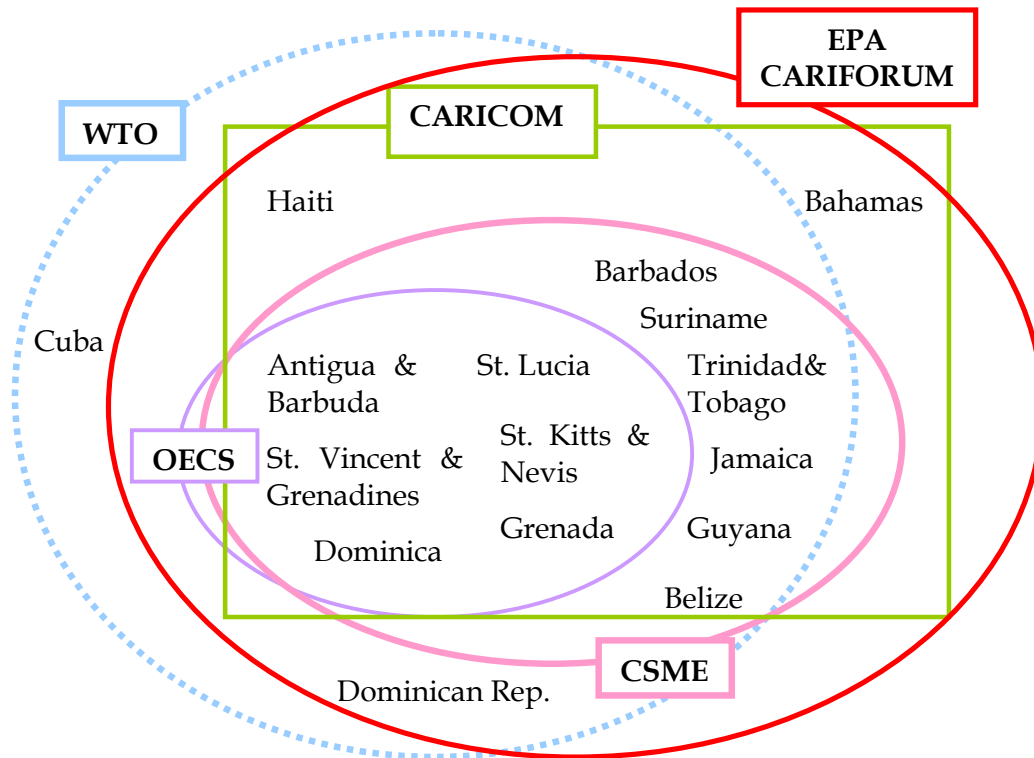
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<sup>2</sup> “Plan and Schedule for CARIFORUM – EC Negotiations of an Economic Partnership Agreement”. Available at: [http://trade.ec.europa.eu/doclib/docs/2004/april/tradoc\\_116912.pdf](http://trade.ec.europa.eu/doclib/docs/2004/april/tradoc_116912.pdf)

<sup>3</sup> “Understanding the Economic Partnership Agreements (EPAs)”, Fact Sheet No. 1, South Centre (2007).

<sup>4</sup> Annex to the Treaty Establishing the Caribbean Community, Chapter III, Article 13, Schedule I.

**Figure 1: Regional Economic Communities**



15. The CARICOM started a process of deeper economic and political integration with the establishment of the CARICOM Single Market and Economy (CSME) in 2006. CSME is to be implemented in a number of phases and through instruments in different areas (single market, standards harmonization, Caribbean court of justice...), the first phase being the CARICOM Single Market (CSM). All the CARICOM countries but Bahamas and Haiti are members to the CSM and it is expected to be fully implemented in 2008 through the harmonization of economic policy and eventually the adoption of a single currency.<sup>5</sup>

16. In addition to CARICOM, six CARICOM states (Dominica, St Lucia, Antigua & Barbuda, Grenada, St Kitts and Nevis, St Vincent & the Grenadines) plus Montserrat<sup>6</sup>, Anguilla and British Virgin Islands form the Organisation of Eastern Caribbean States (OECS), created in 1981. The organisation's competence extends over a number of important areas, such as cooperation in health sector reform and telecommunications and information technology improvement. With its monetary

<sup>5</sup> <http://www.jamaica-gleaner.com/gleaner/20060131/lead/lead1.html>

<sup>6</sup> Montserrat is not included in the negotiation configuration of the EPA as it is not an independent territory but a British overseas territory.

union, the ongoing process of creation of an economic union at an accelerated pace as well as the common judiciary system, the OECS represents a deeper form of regional integration than CARICOM.

17. Since December 2001, the economic relations between CARICOM and Dominican Republic are framed by the free trade agreement (FTA) originally signed in 1998.

18. The multiplication of these integration and liberalisation processes bears consequences for the EPA negotiating process. It must be acknowledged the Caribbean region shows a deeper degree of integration compared to other EPA ACP regions. However, the integration process is not complete and needs to be strengthened by the implementation of the EPA. This is all the more important since there are plans for further forms of integration, as the ongoing implementation of a CARIFORUM Common External Tariff (CET) demonstrates.

19. Nonetheless, very different liberalisation levels can be detected across the region, with some countries applying already mostly low tariff rates. As a matter of fact, in addition to the integration processes mentioned above, CARIFORUM countries signed bilateral free trade agreements with a number of Central and Latin American countries, such as Cuba, Costa Rica, Colombia and Venezuela, and Canada. Additional talks are ongoing for the creation of a Free Trade Area of the Americas (FTAA), as well as with Canada and the Southern Common Market (MERCOSUR) for the conclusion of FTAs. Finally, the Dominican Republic joined the Central American Free Trade Agreement (CAFTA) with the United States in 2004, which has indeed been renamed US-DR-CAFTA.

#### B. CARIFORUM institutional and policy making framework

20. The CARIFORUM negotiating structure is outlined in the 2004 Plan and Schedule for EPA negotiations.<sup>7</sup> As for other ACP EPA regions<sup>8</sup>, there were three levels involved in the negotiations, which cooperated at the technical level. At the Ministerial level, the appointed Lead Spokesperson, Senior Minister Dame Antoinette Miller of Barbados is assisted by a Ministerial Troika composed by representatives from the Dominican Republic, St. Lucia and Belize. The Director-General of the Caribbean Regional Negotiating Machinery (CRNM)<sup>9</sup> has been

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<sup>7</sup> See footnote 1.

<sup>8</sup> See Background Notes prepared by the South Centre regarding other ACP EPA regions. See, for instance, Figure 2 of "Trade Negotiations in the West African region: Issues for consideration" (2007), available at [www.southcentre.org](http://www.southcentre.org).

<sup>9</sup> Established in 1997, the Caribbean Regional Negotiating Machinery (RNM) is the principal regional intergovernmental organization mediating the Caribbean's encounter with the global trading system.



appointed as the region's Principal Negotiator. Negotiations at the technical level are carried out by the EPA College of Negotiators formed by technical experts from regional institutions like the CRNM, the CARICOM Secretariat and academic institutions as well as from the private sector. Furthermore, the regional secretariats from CARICOM and the OECS provided important technical support.

21. The negotiating machinery was completed by a Regional Preparatory Task Force (RPTF). On the CARIFORUM side, it comprises representatives of regional and national authorising officers, regional secretariats universities, institutions, non-state actors and a CARIFORUM Member of the ACP Development Finance Committee. The EC side of the RPTF is formed by officials from DG Trade, DG development and an EU Delegation based in the Caribbean. The RPTF task, as in most other ACP regions, is "to cement the strategic link between EPA negotiations and development cooperation"<sup>10</sup>. Concretely, it assists the negotiating process by identifying EPA-related technical assistance needs and including such needs in the programming of future EU aid to the CARIFORUM region and countries.

### C. CARIFORUM economic, productive and export profile

22. The CARIFORUM region is composed of 12 small island states and 3 coastal small to medium size states (Belize, Suriname and Guyana) heavily dependent on trade for their development. Caribbean economies are scarcely diversified and the geographical characteristics make them remarkably vulnerable to natural phenomena, especially climate change and sea-level rise.

23. The region has a cumulated market size of around 24,9 million people and an average annual population growth of 0.82% (2005). The regional GDP is US\$81.4 billion with an average GDP per capita of US\$8,687. The aggregated data, however, conceal major differences in the national contributions to the regional GDP. The combined economies of the Dominican Republic and Trinidad & Tobago<sup>11</sup> constitute 56% of the CARIFORUM GDP. Aside from Jamaica (13%), Bahamas (6%) and Haiti (6%), the remaining nine countries collectively account for only 11% of the regional GDP. Dominica, on the other extreme, represents less than 1% of the region's GDP.

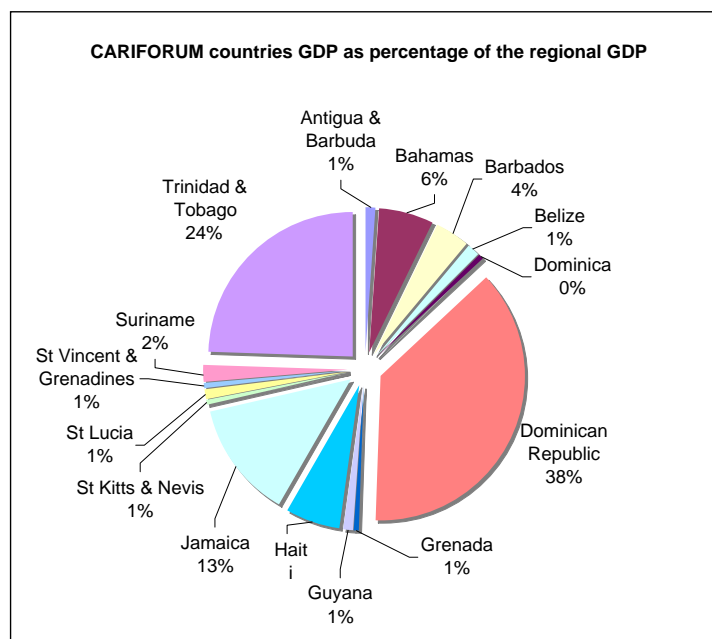
### **Figure 1 - CARIFORUM GDP regional distribution**

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See <http://www.crnw.org/about.htm>, last accessed January 25, 2008.

<sup>10</sup> See footnote 1, par. 9.

<sup>11</sup> It is also worth noting that Trinidad & Tobago's economy is largely tributary to the country's oil production, which accounts for 34% of the country's GDP and 70% of its exports.



24. Haiti shows the lowest GDP per capita – US\$1,800 – while Bahamas (US\$21,600), Trinidad & Tobago (US\$19,800) and Barbados (US\$18,400) are the three GDP per capita top countries. Belize, Dominican Republic and Saint Kitts & Nevis’ GDP per capita revolve around the regional average of US\$8,687. As the HDI values and rankings also demonstrate, CARIFORUM is by far the region with the higher level of development among the EPA negotiating regions.

**Table 1 - GDP per capita, HDI value and ranking  
Comparison between CARIFORUM, SADC and PACP regions**

EPA region	CARIFORUM	SADC	PACP
GDP per capita (US\$)	8,867	4,428	3,833
HDI value (lowest-highest in the region)	0.529 (Haiti) – 0.892 (Barbados)	0.390 (Mozambique) – 0.626 (Namibia)	0.530 (Papua New Guinea) – 0.819 (Tonga)
HDI ranking (highest - lowest in the region)	31 <sup>st</sup> – 146 <sup>th</sup>	125 <sup>th</sup> – 169 <sup>th</sup>	55 <sup>th</sup> – 145 <sup>th</sup>
Number of LDCs	1	4	5

25. The fact that the region has a relative higher level of development and only Haiti is an LDC has translated into greater negotiating preparedness during the EPA process, and a better articulation of the region’s commercial interests. It has also meant that the pressure for concluding an agreement was perhaps greater than in some other ACP regions, since the bulk of Caribbean countries would not be eligible for the EU’s LDC-only Everything But Arms (EBA) preferential scheme.

26. Concerning sector-specific production, agriculture accounts for around 11% of regional GDP but its importance at the national varies considerably. As a matter of fact, while it contributes to less than 1% of Trinidad & Tobago’s GDP, Guyana and Belize’s economies rely on agricultural production for 34.9% and 22.5% respectively.

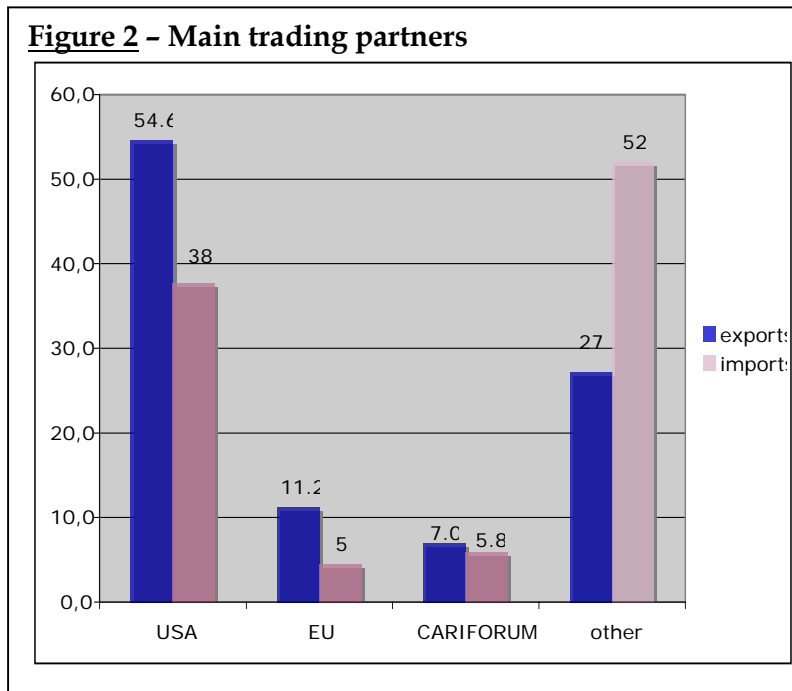
On the contrary, industrial activities constitute the backbone of Trinidad & Tobago's economy (59.8%), although the regional average is far lower, at 24%. Services are the most important component of the CARIFORUM economy, accounting for 64.5% of the regional GDP and spanning from 90% in Bahamas to 39.4% in Trinidad & Tobago. With the exception of the agricultural production, where the employment importance of the sector outweighs its contribution to the national GDPs, the employment and GDP by sector data show no major discrepancies.

27. At the regional level, merchandise trade stands at 75.8% of regional GDP, spanning from 161.2% in Guyana to 53% in the Bahamas and denoting a high dependence on trade. The region is indeed heavily import-dependent, with imports of goods and services accounting for almost 65% of the regional GDP, with a peak of 123.9% in the case of Guyana.

**Table 2 - GDP composition and trade in goods and services  
CARIFORUM, West Africa and PACP EPA regions in comparison**

	GDP composition by sector (% of total GDP)			Trade in good and services (% of GDP)	
	<i>Agriculture</i>	<i>Industry</i>	<i>Services</i>	<i>Exports</i>	<i>Imports</i>
CARIFORUM	11.4	24.1	64.5	49.2	64.9
West Africa	36.7	21.5	41.9	46.5	61.1
PACP	21.4	22.2	56.4	46.5	61.1

**Figure 2 - Main trading partners**



28. Overall, the region's exports are concentrated on four main product categories, representing 42.8% of the total value of exports: mineral fuels, boats and ships, electronic equipment, and beverages. Nonetheless, it is worth noting that only two countries (Antigua & Barbuda and the Bahamas) export boats and ships, while each of the remaining three

types of goods are exported by at least five countries. Sugar exports stand at around 2% of the total exports at the regional level and it appear among the top three exports only in Guyana (30% of exports).

29. Unlike other African EPA regions, the region's main trading partner is the United States, and not the EU (54.6% of Caribbean exports go the USA as opposed to 11.2% to the EU market). Intra-regional trade amounts to 7% of total exported products, with Jamaica - the most important CARIFORUM export market - garnering 3.4% of regional exports and figuring as one of the five most relevant market exports for Belize, Dominica, Guyana and Trinidad & Tobago (Figure 3).

30. Imports are also remarkably concentrated on mineral fuels (24.3% of total imports), boats and ships (10.0%), boilers and machinery (4.8%) and vehicles other than railway (4.5%). Each of the remaining four most imported products (electronic equipment, generic consumer goods, apparel items and cereals) accounts for less than 4% of total imports. The main trading partners for the top imported merchandise are the US (37.7%), Nigeria (13.1%), Brazil (8.4%), Trinidad & Tobago (5.7%) and South Korea (4.7%). The EU looks a more important export than import market. Indeed, only 4.5% of the three most imported products for each CARIFORUM country originate in the EU. Again, although economic integration is deeper than in other EPA negotiating regions, intra-regional trade is not strongly developed, as only 5.8% of the regional imports demand is supplied by CARIFORUM members.

### III. SPECIFIC EPA-RELATED CHALLENGES AND OPPORTUNITIES

#### A. Development dimension and regional integration

31. The definition of a development dimension is one of the most challenging and controversial issues regarding the negotiation and conclusion of an EPA. As set forth in the Negotiating Principles, the guiding principle of EPAs is that they should serve as an instrument for development.

32. Indeed, Part I of the draft texts and of the agreement initialled on December 16, 2007 indicates the treaty as intended to establish a trade partnership for sustainable development. Developmental objectives such as the eradication of poverty, promotion of regional and world economic integration together with improved trade policy capacity, both at State and private sector level, are the backbone of the this first part. These objectives should be met through the development cooperation measures spelled out in article 7 (October 2007 draft).

33. Nonetheless, it is remarkable that this part of the agreement contains no funding

commitments and is scarcely detailed compared to part II (Trade and trade-related matters), where indeed more interesting development cooperation clauses are contained. Two types of cooperation measures find place in the text: the first type relates to economic transformation in various areas, such as agriculture and innovation, are usually spelled in a very broad and abstract way; the second concerns the EPA implementation. While specific measures like customs administration, trade facilitation and protection of intellectual property contribute remarkably to the cooperation side of the EPA implementation, time and funding commitments in support of economic transformation and adjustment rarely figure in the wording of the agreement.

34. The need to better clarify the extent and details of the EU commitments in terms of assistance and cooperation on the adjustment side is even more important when one considers the uncertainty about the effective amount of the 10<sup>th</sup> European Development Fund (EDF) and about the possibility to gather development funds out of the EDF framework. As a matter of fact, the expected EDF amount over the 2008-2013 period is insufficient to cope with all the economic transformation and adjustment issues raised by the conclusion of the EPA, such as fiscal downsides deriving from tariffs elimination and production, employment and income drops caused by trade diversion and increased competition.

#### B. Market Access

35. Since January 1991, CARICOM countries have applied the CARICOM Common External Tariff (CET) to imports from non-CARICOM members. Imports originating in CARICOM states are duty free, although each member is allowed to impose import duties on imports of scheduled products from other members.

36. Each country's tariff schedule also contains a List of Items Ineligible for Duty Exemptions, which includes goods that may not be exempted, wholly or in part, from MFN tariffs nor imported at a reduced MFN rate even if imported for approved uses. The list includes in particular agri-food and industrial goods products in the CARICOM market in quantities considered adequate to justify the application of tariff protection.

37. CARIFORUM countries have higher tariffs for food-stuffs, tobacco and fish products, which can be perceived as the result of a double strategy. On one hand, CARIFORUM countries aim at ensuring a balance between imports and exports as to ensure food security in the region vis à vis the decreasing food production, exports and export earnings. On the other hand, the tariffs reflect the need to create the conditions to allow the domestic industries to gradually cope with international competition and to be shielded against the extreme volatility of international market for the products figuring as the region's main exports. This commonality of policy

objectives should constitute an element facilitating the establishment of a single regional list of sensitive products in EPA market access discussions, that is, a list of products which would either not be subject to liberalisation commitments or would benefit of longer transition periods.

**Table 3 - CARIFOM Tariff profile (%)**

	Simple average MFN applied	Agricultural products average MFN tariff**	Non-agricultural products tariff**	Range of applied tariff rates
Antigua & Barbuda*	9.7	15.0	8.9	0-70
Bahamas	30.2	24.1	31.2	0-120
Barbados	13.5	30.0	11.0	0-243
Belize	10.8	20.7	9.3	0-70
Dominica*	9.9	20.4	8.3	0-165
Dominican Republic	8.5	13.1	7.8	0-40
Guyana	11.1	21.1	9.6	0-100
Haiti	2.8	5.7	2.4	0-57.8
Jamaica	7.3	17.2	5.8	0-100
St Kitts & Nevis*	9.2	13.3	8.6	0-70
St Lucia	8.9	14.8	8.0	0-70
St Vincent & Grenadines	9.8	15.6	8.9	0-40
Suriname	18.5	19.9	17.1	0-50
Trinidad & Tobago	7.8	15.8	6.6	0-100

*Source:* WTO, ITC, UN (2007), "World Tariff Profiles 2006". \* Countries applying a customs services tax or charge on all imports, which is to add to the data listed in the table. Antigua & Barbuda: 10%; Dominica 3%; St Kitts & Nevis 6%. \*\* WTO definition.

*i. Fiscal and Revenue Consequences of the Shift to Reciprocal Trade*

38. One of the best-known challenges that ACP countries will face as a result of EPA reciprocity is the potential loss of fiscal revenue resulting from the elimination of tariffs on EU imports<sup>12</sup>. As in many other developing countries, a prominent purpose of import tariffs is to raise revenue. Hence, the replacement of unilateral preferences with reciprocal free access to CARIFORUM markets requiring the

<sup>12</sup> South Centre (2007), "Fact Sheet 3: Trade liberalisation and the difficult shift towards reciprocity in the EPAs", available at: [www.southcentre.org](http://www.southcentre.org)

abandonments of tariffs on imports bear consequences on governments ability to raise revenues and is likely to lead to revenue losses. For this reason, tariff elimination negotiations need to foresee temporary compensatory mechanisms as well as technical and financial assistance to implement fiscal and economic reforms.

**Table 4 - Import Taxes as % of total government revenues**

Antigua & Barbuda (2006)	53.5
Barbados (2001)	29
Belize (2002)	60
Dominica (2006)	22.9
Dominican Republic (2002)	15.6
Guyana (2003)	18.6
Haiti (2003)	65
Jamaica (2004)	9.3
Saint Kitts & Nevis(2006)	35.7
St. Lucia (2006)	53.5
St. Vincent & Grenadines (2006)	41.3
Suriname (2004)	17
Trinidad & Tobago (2004)	4.7

39. The possible loss of government revenue due to tariff reduction and elimination in the Caribbean region is likely to be compounded by the region's involvement in the current Doha Round of trade negotiations at the WTO. As a matter of fact, most Caribbean countries will be

called to reduce their agricultural and industrial tariff WTO-bound rates, sometimes meaning a reduction of applied tariff rates and a consequent loss of tariff revenue. It must be noted, however, that the extent of tariff reductions induced by WTO negotiations is still subject to ongoing negotiations.

40. The concern over the erosion of the revenue base has been recently emphasised by Guyana's President, who worries that the reciprocity requirement may cause the CARIFORUM region to run fiscal deficits as a result of the decreased import revenues.<sup>13</sup>

41. Indeed the picture concerning the contribution of taxes on imported goods as a share of total government revenues is rather scattered: on one hand, in countries like Belize, Haiti and St Lucia taxes on imported goods account for a relevant share of government's budgets, 60%, 65% and 53.5% respectively. On the opposite side are countries like the Dominican Republic, Jamaica and Trinidad & Tobago, which have recently undergone fiscal reforms aimed at replacing import taxes with other fiscal instruments, like value added taxes (VAT) and for which taxes on imports account for 15.6%, 9.3% and 4.7% of government revenues respectively. However, it is worth recalling that despite differences in the relative weight of tariffs as a source of government revenue in the region, the reliance on tariffs remains remarkable

<sup>13</sup> "The Caribbean lost in the negotiations with Europe", Starbroek News Jan 8th , 2008

(import tariffs as a share of government revenue does not represent more than 1% in OECD countries).

42. To prospectively tackle the challenge of adjusting to loss of fiscal revenue, solutions should be taken into consideration during EPA negotiations. Temporary compensation for revenue losses following trade taxes reduction can constitute a chapter of EPA negotiations. Such chapter, would be consistent with the EU official commitment to “promote an effective response to the wider AfT agenda in ACP countries and regions” by contributing “to the absorption of net fiscal impact resulting from tariff liberalization in the context of EPAs”.<sup>14</sup> This political decision still needs to be made operational through a predictable compensation scheme.

*ii. Trade Diversion and Trade Creation*

43. In addition to the impact of EPA on national revenues, an aspect of EPA reciprocity which is more difficult to predict is the extent to which a free trade agreement with the European Union will be more trade creating than trade diverting, i.e. whether lowering barriers on EU imports will increase the efficiency of local production or cause partners to shift their trade to more competitive EU imports. This is relevant as it relates directly to whether or not an EPA will enhance local production, support economic diversification and contribute to intra-regional trade.

44. As reported in a recent ODI study, there is no incontrovertible evidence that the EPA will either have a trade creation or trade diversion effect. Indeed, it will depend on the extent of simultaneous MFN tariff cuts: in case the cuts are above 50%, then trade creation will be larger than trade diversion.<sup>15</sup>

45. Because the outcome is rather uncertain, it is important to stress that the design of the CARIFORUM EPA is of the uttermost importance to maximize the possible trade benefits. In this sense, trade diversion could be avoided through a carefully planned tariff reduction and elimination scheme, associated with measures targeted at assisting producers facing particular difficulties in adapting to import competition (e.g. modernisation or retraining). In addition, the possible positive trade effect could be enhanced through well-designed measures aimed at adding value added in strategic sectors presenting growth potential.

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<sup>14</sup> Council of the European Union, “Adoption of an EU Strategy on Aid for Trade: Enhancing EU support for trade-related needs in developing countries”, p. 14. 11 October 2007, doc. 13070/07.

<sup>15</sup> ODI, “The Potential Effects of Economic Partnership Agreements: What Quantitative Models Say”, Briefing Paper No. 5, 2006



### C. Agricultural trade and production

46. At the regional level agriculture accounts for 11.4% of GDP and employs around 21.1% of the population. However, for the majority of the EPA CARIFORUM countries agriculture contributes significantly to national wealth and constitutes an important source of exports. As a matter of fact, agriculture represents over 20% of national GDP in Belize (22.5%), Guyana (34.9%) and Haiti (28%). Small-scale agriculture constitutes an important resource for local supply and consumption on the smallest islands of the region. This is the case of Saint Kitts and Nevis, St Vincent and Grenadines and St Lucia, where aside from the export-oriented production of bananas, other products such as fruit, vegetables and livestock are produced for the local consumption and, to a lesser extent, for the regional market.

47. The main export crops are: sugar, banana, rice, citrus, cocoa and coffee. Export earnings from these products have shrunk in recent years for multiple reasons. The high susceptibility to world market dynamics has hindered price stabilization with consequences on the degree of investments for the improvement of production capacity and quality. Agricultural production capacity is also compromised by the high vulnerability of the CARIFORUM countries to natural phenomena, particularly hurricanes. Further, the earning from products like sugar, banana and rice have been dependent on the special protocols and regimes provided under the Lomé/Cotonou system. As explained below, with the denunciation of such protocols, the banana and sugar industries face major challenges in most of the producing countries due to high production costs with a consequent loss of competitiveness.

48. Food imports represent usually around 10% of total imports, with the notable exceptions of Dominica (18%), Grenada (19.6%) and Haiti (50%). Antigua & Barbuda, the Bahamas, Haiti and Trinidad & Tobago are net importers of agricultural products. On the contrary, Barbados, Belize, Dominica, Dominican Republic, Grenada, Guyana and Jamaica are classified as food net exporters.<sup>16</sup>

49. Although some countries have experienced improvements in food production compared to the beginning of the 1990s (namely Bahamas, Belize, Guyana, Jamaica), FAO studies record a generalized increase in food imports to meet the calories intake needs of the population. Moreover, self-sufficiency in food production is declining. The heavy dependence on international food trade is particularly evident when looking at the data concerning the net cereal imports as a share of total consumption. The figures range from 27.2% in Belize to 100% in St Lucia. But what is noteworthy is

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<sup>16</sup> FAO data. Detailed data on food imports and exports are not available for St Kitts & Nevis, St Lucia, St Vincent & Grenadines and Suriname.

that of the remaining countries, only in Haiti and the Dominican Republic net imports of cereals are less than 70% of total consumption. Antigua, Bahamas, Grenada, Jamaica, St Vincent & Grenadines and Trinidad & Tobago's net cereal imports are over 90% of total consumption.

50. In this regard, the establishment of the EPA between the CARIFORUM states and the EU raises the question of whether the liberalisation therein envisaged may cause a surge of imports. Food security concerns have already translated into the establishment of border measures in most CARIFORUM countries in order to ensure a balance between food imports and exports. Further, domestic assistance is delivered to foster a diversified economic base. As far as the CARIFORUM-EU EPA is concerned, adequate safeguards, agricultural production enhancement measures and the creation of a list of agricultural sensitive products are the fundamental pillars for the creation of an agreement in the interest of and from which the CARIFORUM countries can actually benefit.

51. One related question is whether the recently agreed EPA will constitute a tool for improved market access conditions for the CARIFORUM agricultural and food exports to the EU market, thus creating additional market access opportunities for local produces and inducing an increase in CARIFORUM-originating EU agricultural and fish imports. The sections below describe considerable difficulties that could make an increase in market access doubtful. On the one hand, as demonstrated by the ongoing drop of agricultural productivity experienced by most CARIFORUM countries, the geographical constraints and resources availability hinder the creation of economies of scale necessary to allow for an automatic increase of agricultural produce. On the other hand, the EPA will not offer any treatment equivalent to that afforded under the Agricultural protocols, hence offering only the continuation of Cotonou tariff preferences.

*i. EPA-related challenges: sugar and bananas*

52. CARIFORUM sugar production is more costly when compared to other countries in the Central and Latin American region. Similarly, low yields and high production costs compared with Latin American producers have been recognized as competitive problems for CARIFORUM banana producers.

53. The smaller islands, like Antigua & Barbuda, Dominica, Grenada, Saint Lucia and Saint Vincent & Grenadines are not export-oriented sugar producers. Some of them may have sugarcane cultivation but the output is destined to the local market. On the contrary, it is on those smaller countries (Dominica, Saint Lucia and Saint Vincent & Grenadines), as well as in Jamaica, Suriname and Dominican Republic that bananas production tends to concentrate. With the exception of the latter, where the production and exports volume have increased or been stable since 2000, the

remaining countries all experience dramatic decreases in bananas production and export earnings. For example, bananas export earnings in St Lucia have dropped from US\$ 68 millions in 1992 to US\$ 7 million in 2006.

54. In the case of sugar production, the Dominican Republic is the only country to take advantage of the US sugar regime, while the EU is the main destination market for the other Caribbean sugar producers, who have benefited from preferential access to that market by virtue of the EU sugar protocol.<sup>17</sup> The denunciation of the EU sugar protocol is likely to bear consequences on the CARIFORUM countries. Indeed, although sugar production in Belize, Dominican Republic, Guyana and Jamaica is expected to remain marginally profitable even after the Sugar Protocol phases out, the reduction by 36% the current EU internal price for sugar is going to impact on the countries' ability to maintain the same levels of exports and hence earnings.<sup>18</sup> The situation is worsened by the fact that the sugar industry is an important employer, especially in rural areas. Further, it constitutes the most important agricultural export for Belize, Dominican Republic, Guyana and Jamaica.

55. These circumstances, coupled with the generally high production costs resulting from climatic and ecological factors, high labour costs and the small size of the countries call for the elaboration of specific measures within the EPA Development chapter and for EU financial assistance. Such measures must be designed as to render the CARIFORUM countries able to meet the objective of an internationally competitive sugar production through structural interventions, modernisation, and cultivation expansion in order to reduce costs and favour the shift towards greater value added products.

#### *ii. Fish*

56. Generally speaking, CARIFORUM countries' fishing capacities are relatively limited and the fishing industries mainly supply local markets. Few countries have developed an export-oriented fish sector, among which are Belize and Guyana. In these two countries, fishing activity and its importance for the GDP and total exports has increased remarkably in the last 10 years. In Guyana, for example, trawled

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<sup>17</sup> Under the sugar protocol, the European Union agreed to buy a fixed annual quantity of sugar from ACP producers at guaranteed prices aligned to European internal sugar prices and established annual quotas for sugar producers. MFN suppliers have limited access to the EU under specific quotas and an in-quota tariff rate of US\$98 per ton, much higher than the zero rate applied to imports under the Protocol. Thus, ACP sugar producers receive a substantial preference over the MFN suppliers.

<sup>18</sup> For a detailed analysis of the EU sugar reform and regime, refer to "*The Reform of the EU Sugar Sector: Implications for ACP Countries and EPA Negotiations*", South Centre (2007), available at: [www.southcentre.org](http://www.southcentre.org)

shrimps accounted for 12% of total exports in 2005 (compared to 1% in 1995). Belize has specialized in farmed shrimps.

57. Fish exports account for only 1.3% of total exports and the principal destination markets are the United States and Mexico. Nonetheless, the European Union is perceived as a potentially lucrative market following the certification allowing the signatory CARIFORUM countries (Belize and Guyana) to export to the EU. In this domain, specific attention should be focused on the creation of assistance schemes aimed at targeting unsustainable fishing practices that can lead to output reductions and deterioration of the environment. Further, significant investments in fish-related facilities (ice, marketing, transportation...) can render the export-oriented fishing industry an attractive option in the diversification strategies of the smaller countries.

*iii. Rules of Origin and SPS*

58. The ability of CARIFORUM producers to increase their exports to the EU market does not only depend on the CARIFORUM countries' productivity but also on the conditions set by the EU for the CARIFORUM products to enter its market. Indeed, stringent rules of origin (RoO) requirements and sanitary and phytosanitary standards (SPS) often act as an impediment for CARIFORUM agricultural and fish exports. As far as SPS are concerned, the EPA concluded does not offer specific commitments regarding assistance to the CARIFORUM private sector to meet SPS.

59. One pressing issue for sugar producing countries is the acceptance by the EU of cumulation of inputs in the sugar value chain. The exclusion of cumulation for the purposes of defining the origin of products harms production coordination at the regional level, hence contradicting the regional integration purpose of the EPA.<sup>19</sup> While the EU seems to have accepted cumulation to be included in the RoO EPA chapter, a number of sugar-based economies are said to have been excluded from regional cumulation of value added at least until 2015.<sup>20</sup>

60. In the end, the simplification of RoO and capacity building measures to meet SPS are deemed of the uttermost importance for the EPA not to make the CARIFORUM countries worse off.

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<sup>19</sup> Press Report, *Stabroek News*, "EU's origin rules for sugar products unacceptable –Jagdeo" Wednesday, December 12th 2007. Available at [http://www.stabroeknews.com/index.pl/article\\_general\\_news?id=56534902](http://www.stabroeknews.com/index.pl/article_general_news?id=56534902), last accessed on January 25<sup>th</sup>, 2008.

<sup>20</sup> Girvan Norman, "Implications of the Cariforum-EC EPA", updated January 21 2008, available at <http://www.normangirvan.info/implications-of-the-cariforum-ec-epa-norman-girvan/>, last accessed January 25<sup>th</sup>, 2008.

#### D. Industrial products

61. Manufacturing output has declined in the whole region, except for Haiti, where exports, largely destined to the USA, have increased strongly<sup>21</sup>. More competitive imported goods add to the structural causes of a generally not highly competitive manufacturing.

	1991	2001
Antigua & Barbuda	5,39	n.a.
Bahamas <sup>e</sup>	4,14	4,07
Barbados	10,12	6,97
Belize <sup>e</sup>	11,10	9,39
Dominica <sup>g</sup>	n.a.	8,76
Grenada <sup>f</sup>	7,67	7,41
Guyana <sup>a, g</sup>	11,20	11,67
Jamaica	10,91	7,11
St Kitts & Nevis	n.a.	n.a.
St Lucia <sup>b, d</sup>	12,16	9,77
St Vincent & Grenadines	8,37	n.a.
Trinidad & Tobago <sup>*, b</sup>	10,77	10,62

*Source:* South Centre elaboration of ILO data. First available data year different from 1991: <sup>a</sup> 1992; <sup>b</sup> 1993. Last available data year different from 2001: <sup>b</sup> 2002, <sup>d</sup> 2000; <sup>e</sup> 1999; <sup>f</sup> 1998; <sup>g</sup> 1997. \* Data excluding oil and sugar

62. Manufacturing activities never account for more than 9% of national GDP, with the exception of Jamaica (13.5%) and the Dominican Republic (16.2%). Agro-industries like sugar refining and rum distilling together with the production of consumer goods (such as foodstuffs, tobacco, clothing and apparel articles) and construction materials are the most important value added industries. Mineral extraction and semi-processing are also important activities in some countries, such as Guyana (gold and bauxite), Jamaica (bauxite and alumina) and Suriname (alumina).

63. A first factor explains the decline of manufacturing output and earnings is the region's high labour costs. This circumstance is common to most of the CARIFORUM countries, especially Barbados and the OECS states. For example, Barbados foodstuffs and chemicals are now directed mainly towards the regional market as they lack the necessary competitiveness to be placed on the international market. The same can be said for Saint Vincent and Grenadines whose

production of food products supplies the OECS market.

64. A second justification is the decline in the production of agricultural inputs required by the food processing industry also as a result of the volatility of the food products market. This is especially evident in the sugar producing countries like

<sup>21</sup> Haiti's textile and apparel exports to the USA have grown by 18% in value and 33% in volumes between 2004 and 2005.

Barbados. Related consequences on employment levels were particularly felt in Barbados, Jamaica and St Lucia.

65. An illustration of difficulties in manufacturing can be found in the clothing, footwear and apparel industry, which is highly vulnerable to competition from lower-cost producers. The situation affects in particular some OECS countries and Belize, whose US export-oriented assembly of garments industry (*maquilas*) strongly suffers from competition of other Central American countries and China. The improvement of market access opportunities in the EU for this sector would constitute a positive consequence. However, the EPA simply represents a continuation (not improvement) of market access conditions and in this sense it is not sure it will open new opportunities and help diversify export markets for this sector.

66. Countries of the region have tried to confront difficulties with a number of measures, the most common of which has been to set higher tariffs and tariff peaks on the imports of processed food, soft drinks, clothing and apparel articles, construction material. Countries have also increased tariffs sporadically to face import surges. For instance, Trinidad and Tobago periodically increases the tariff rates on the imports of cement (up to 60%). In this sense, the dismantling of tariffs under the EPAs and the concomitant reduction of WTO bound tariff rates at the WTO constitute major restrictions of these countries' policy space. The loss of such regulatory space can be, at least partly, mitigated through the utilisation of trade defence instruments (such as infant industry safeguard clauses) under an EPA.

#### E. Services

67. Services is the major contributor to GDP in the CARIFORUM region, with tourism being the major source of foreign exchange, particularly in the areas of business travellers or expatriates returning for home visits, beach-based holidays and cruise traffic. Governments in the region have taken policies to increase investments in tourism-related projects in most CARIFORUM countries, particularly in the run up to the 2007 Cricket World Cup. There has also been significant private sector investment in the tourism sector.

68. The tourism sector has a trickle down effect on other sectors of the economy particularly on the construction sector in Barbados, Antigua and Barbuda, and St Kitts and Nevis, aimed at expansion of hotels capacity. Trinidad and Tobago, and Jamaica-based airlines are growing, and Antigua is the operational base for a medium-sized airline that operates high-frequency inter-island scheduled services. However, most of the flights into the region are foreign owned-thereby reducing the full potential of benefits from the sector.

69. The main markets for the Caribbean tourism industry are the US, UK, the EU and Canada. In Barbados the UK contributes with 38.5% and the US with 23.4% of the sector's earnings. For Belize, the contribution is at 61.7%, with the EU at 13.9% and Canada at 6.3%. Jamaica has the US contributing 71% with the EU and Canada at 25%. Antigua and Barbuda has 40%, with the US at 30% and Canada at 5%, while St Lucia has 39% for the US, with 27% for the EU and Canada at 6%.

70. Another critical sector is offshore financial services especially in the OECS and Belize. The Barbados insurance company (Sagicor) controls 75% of the Eastern Caribbean market, maintains a strong competitive position in Trinidad and Jamaica and a toehold in the North American market. While Barbados has a fairly well regulated offshore financial sector, there are still challenges with regulatory capacity. Onshore financial services have been recently developed with trade in this sector being mainly intra-regional. Internet gambling is also wide spread, particularly in OECS countries with Antigua and Barbuda having won a case against the US on gambling restrictions in the latter country.<sup>22</sup>

71. Telemarketing and informatics including software development and Information technology are also important sectors. Data processing and software development are viewed as potential growth sectors particularly in Jamaica and the OECS. However, the main difficulty hindering further development of the sub sector is the lack of economies of scale.

72. The high standard of education ensures the possibility to run "back-office" operations such as the processing of insurance claims, database management and software development. The promising start in the informatics sector is however hampered by high telecommunications costs and competition from locations with lower wage levels.

73. Education services contribute significantly to the OECS' economies for example the offshore medical school in Antigua and Barbuda, which opened in 2004, as well as a veterinary medicine school mainly for US students in St Kitts Nevis.

74. Other important sectors are communication, wholesale and retail trade, transport, banking and insurance sectors, all of which as at 2005 accounted for approximately 46% of real GDP.<sup>23</sup>

*i. Challenges posed with the EPAs*

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<sup>22</sup> United States – Measures Affecting the Cross-Border Supply of Gambling and Betting Services (Complainant: Antigua and Barbuda), World Trade Organization, DS285, 13 March 2003.

<sup>23</sup> See OECS government report for the Trade Policy Review of 2007. ON line available <http://www.wto.org>.

75. In services, CARIFORUM LDCs and non-LDCs have committed to 65 and 75% respective sectoral coverage with a standstill clause and provisions for future liberalization.

76. An issue that came out strongly was the need on the part of CARIFORUM to have mode 4 commitments for entertainment services in all EU Member States. There will be need on the part of the various governments to invest in developing capacity of these service suppliers so as to tap on the market access that will result from this Agreement.

77. In Services negotiations at the WTO, the OECS has signalled that they have issues of weak capacity in the area of domestic regulation, calling for flexibility based on recognition of specific concerns including capacity constraints related to financial, administrative and institutional capacity as well as size and level of development. Since the EPAs, as presented to various ACP regions include various provisions on regulation, implementing these will be a key challenge for the CARIFORUM.

78. It is therefore important that the CARIFORUM countries work towards bringing to life the provisions of the development chapter in the EPA so as to strengthen capacity in the supply of services, get their service suppliers and professional associations trained, as well as ensure improvements in regulatory capacity, including at the national and regional level. As the EU is the obvious winner in this Agreement, it is important that CARIFORUM insists on the EU bearing the costs and fulfilling the obligations set out in the Agreement to develop the region's capacity to trade in services. This will require planning at national and regional level so as to ensure that in implementing the EPAs, regional integration is enhanced, and not obstructed.

#### IV. CONCLUSION

79. The EU is not the main trading partner of the region, but nonetheless constitutes an important export destination for the CARIFORUM countries. In this respect, the EU can represent a strategic export market to help diversify the region's export destinations as well as exported products. An important question, however, is the extent to which the EU represents an export market with growth potential, likely to contribute to the diversification of Caribbean exports. In this sense, the shift towards reciprocity could represent an opportunity for the region to shift away from its traditional, little value added, and preference-dependent, export sectors.



80. In addition, an even more important question is whether or not CARIFORUM countries are able to modernize and enhance their productive sectors in order to tap on possible new trade opportunities created by the EPAs. An enhancement of the region's productive capacity would require strengthening the administrative capacity of the region's governments, so that they can support vulnerable sectors and promote the region's competitiveness, including by utilizing possible policy flexibilities contained in international (WTO) agreements and the EPAs.

81. For these reasons, great attention should be allocated to the concept, contents, and implementation of an EPA development chapter. This includes the clear articulation of the region's technical and financial instruments needed to accompany vulnerable liberalized sectors - especially agriculture especially agriculture, where, in addition to productivity concerns, difficulties could be foreseen in relation to the denunciation of the sugar, bananas and rum protocols.

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