WTO Agreement on Textiles & Clothing

Frequently Asked Questions

CUTS Centre for International Trade, Economics & Environment

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Twenty Years of Social Change
1984 to 2003

Monographs on Globalisation and India – Myths and Realities, #7

#0419

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Published by
कट्स CUTS
CUTS Centre for International Trade, Economics & Environment
D-217, Bhaskar Marg, Bani Park
Jaipur 302 016, India
Email: citee@cuts-international.org
Website: www.cuts-international.org

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Printed by
Jaipur Printers P. Ltd.
Jaipur 302 001

ISBN 81-8257-035-2

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Comments received from Samar Verma, Policy Advisor, Oxfam GB in India is gratefully acknowledged and suitably incorporated.

#0419, SUGGESTED CONTRIBUTION Rs.50/$10

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Preface

This is the seventh monograph of the series entitled "Globalisation and India – Myths & Realities", which we launched in September 2001. The purpose of these booklets is to demystify and present complex issues in as reader-friendly a manner as possible. The previous ones had dealt with general issues of globalisation and liberalisation; functions and implications of the multilateral trading system under the World Trade Organisation (WTO); foreign direct investment; agriculture; and intellectual property rights. This one is on trade in textiles & clothing.

The WTO Agreement on Textiles and Clothing (ATC) is a complex one. Among others, it outlines the procedure of phasing-out the multi-fibre arrangement under which a major portion of international trade in textiles and clothing was conducted since 1960s.

Trade in textiles & clothing was one of the hardest fought issues during the Uruguay Round negotiations. The reason being that a large number of people are directly and indirectly depends on this sector for their livelihoods. Many experts have argued that the developing countries agreed to the inclusion of intellectual property rights in the WTO framework only on the condition that trade in textiles and clothing will be quota-free after an agreed phase-out period.

ATC, negotiated during the Uruguay Round, was seen as a potential area of benefit for the developing countries. Estimates at that time even suggested that over one-third of the total benefits from the Uruguay Round would result from the liberalisation of global trade in textiles and clothing.

However, the structure of the Agreement was such that it was the developed countries that have enjoyed special and differential treatment. During the ten-year phase-out period (1995 to 2004), many developed countries have not only backloaded the items which were of greater interest to developing countries but also did little to introduce the required structural adjustments in their own textiles and clothing sector. Compounding the problem are the various non-tariff measures, such as anti-dumping actions, transitional safeguards and discriminatory rules of origin, which nullify much of the expected benefits.

In 1974, the multi-fibre arrangement (MFA) on trade in textiles & clothing came into force. It was renegotiated five times and existed for 21 years. The purpose behind such a long transition period was to facilitate a gradual process of liberalisation. It extended the coverage of the restrictions on trade in textiles & and clothing from cotton products to include wool and man-made fibre products (and from 1986, certain vegetable fibre products as well). Operationally, the MFA provided rules for the impositions of restrictions, either through bilateral agreements or, in cases of market disruption or threat thereof, through unilateral action. During MFA's operation, a complex network of restrictions was developed. The anticipated benefits, however, have not materialised. This is largely because the integration process has not been commercially meaningful.

In future, the competitive position of countries currently subject to quota restrictions will determine whether the removal of these barriers will be advantageous to them or not. Those countries whose industries have sharpened their competitive edge by adopting up-to-date technology are likely to benefit more. Other exporting countries, particularly those that are not able to make technological progress, may gain marginal benefits.

Traditionally, many enterprises (particularly in some developing and least developed countries) have concentrated on markets in developed countries in Europe and North America. However, the vast potential for increased trade with other developing countries should also be adequately taken into account.

According to analysts, India's strengths in textile production include inexpensive, abundant and skilled labour force that is suited for labour-intensive apparel exports and sufficient raw materials because the country is the third-largest producer of cotton. It is the second-largest producer of textile products in the world, having a long and deep-rooted tradition. It's up to the relevant actors how they seize the opportunities from 2005 onwards. Several factors will determine those opportunities. While the trade will be quota-free, there will indeed be tariff and non-tariff barriers.

However, there are sceptics who think that the quota-regime will be extended for few more years. Though it is unlikely, a number of countries, such as Bangladesh are afraid they will lose their markets to cheaper products originating from other developing countries, like China. Textiles & clothing consists of about 70 percent of Bangladesh's exports.

Given these complexities, this monograph attempts to address some of the basic questions and concerns relating to trade in textiles and clothing. The aim is to equip the reader to understand the fundamentals and underline issues, which will determine the future of this sector.

Jaipur **Bipul Chatterjee**
August 2004 **Director**

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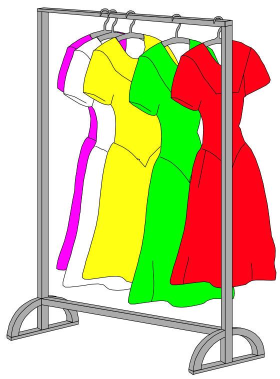

What is the Multi-fibre Arrangement and how does it work?

The Multi-fibre Arrangement (MFA) was a trade pact between some 80 developed and developing countries and it regulated international trade in textiles and clothing through the use of quotas on imports. It was introduced in 1974 and set up a system of quotas designed to protect the apparel industries in developed countries.

Every year, countries agree on quotas and the quantities of specified items which can be traded between them. The exporting country then allocates licences to firms to export a certain proportion of each quota. This provided the basis on which industrialised countries have been able to restrict imports from developing countries. The MFA, thus, has also been allegedly seen as a form of protectionism, which discriminates against the interest of the developing countries.

The MFA was brought in as a supposedly short-term measure, mainly to give industrialised countries a breathing space to adjust to competition from imports from developing countries. Special measures were seen as necessary for textiles and clothing, because of the labour-intensive nature of this sector. In 1974, when the MFA was first negotiated, its lifetime was four years. It was, however, re-negotiated five times and existed for 21 years.

The MFA was contrary to the principles of GATT. It was replaced by the WTO Agreement on Textiles and Clothing, under which MFA restrictions are to be phased-out over a period of ten years, starting on 1st January 1995, and ending by 31st January 2004.

Box 1: MFA and Trade Protectionism
A managed market of this type of arrangement clearly creates vested interests among both the exporting and the importing country: for the exporting country, a quota can often look like a guaranteed market share. The cost is borne by the consumer in the form of higher prices. For example, in 1995, it was estimated that US consumers were paying 7.6 percent more for clothing and the EU citizens 5.8 percent more than they would without MFA. Moreover, maintaining the MFA has provided a precedent, i.e., the fact that special arrangements existed for textiles have encouraged developed countries to try similar measures for footwear, electronic goods, computer chips, automobiles, steel, etc.
Source: The EIU Guide to World Trade under the WTO, Economist Intelligence Unit, London, 1995.

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What is the WTO Agreement on Textiles & Clothing and how is it different from the MFA?

The WTO Agreement on Textiles & Clothing (ATC) is a successor to the MFA. It outlines a programme for the integration of all products into GATT rules by 1 January 2005. It differs from the MFA, in the sense that it aims to bring international trade in textiles and clothing under the normal liberalising and non-discriminatory trade rules. It applies to all WTO members, whether or not they were signatories to the MFA.

The ATC started from the fact that, in 1995, the year of its inception, textiles and clothing from some countries were subject to quotas and other non-tariff restrictions, thereby undermining the non-discriminatory nature of the GATT rules. During the lifetime of the ATC, all textile and clothing products will be brought under the GATT rules, and, as a product comes under the rules, all bilateral quotas on the product must be removed. Resultantly, at the end of the lifetime of the ATC, no products in the sector will be subject to a quota.

The ATC foresees a step-by-step integration, with an increasing percentage of products brought under the mantle of the GATT at each step. The transition from MFA to GATT, via the ATC, has four milestones:

Milestone 1: 1 January 1995
At least 16 percent of products to be brought under the WTO rules.

Milestone 2: 1 January 1998
At least a further 17 percent of products to be brought under the WTO rules.

Milestone 3: 1 January 2002
At least a further 18 percent of products to be brought under the WTO rules.

Milestone 4: 1 January 2005
All remaining products (up to 49 percent) to be brought under the WTO rules.

The implementation is supervised by the Textiles Monitoring Body (TMB), established under the Agreement, which also has some dispute settlement provisions in respect of the Agreement. The WTO dispute settlement mechanism is also available to members.

Box 2: The Preamble of the WTO Agreement on Textiles and Clothing

"…negotiations in the area of textiles and clothing shall aim to formulate modalities that would permit the eventual integration of this sector [textiles and clothing] into GATT on the basis of strengthened GATT rules and disciplines, thereby also contributing to the objective of further liberalisation of trade;

"… in the April 1989 Decision of the Trade Negotiations Committee, it was agreed that the process of integration should commence following the conclusion of the Uruguay Round of Multilateral Trade Negotiations and should be progressive in character;

"… special treatment should be accorded to the least-developed country Members;"

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Business Standard

Have the stipulated quotas on textiles & clothing been eliminated as per the time frame and what has been its cost?

All quotas that had been operating under the provisions of the MFA have shifted to the ATC. The ATC provides that these quotas would be phased out in a period of 10 years from 1995 to 2004.

There is strong criticism of the manner in which the ATC is being interpreted. The process of integration of items has been very reluctant and back-loaded, especially in the case of the US and European countries. These countries are seen as deliberately holding back on the process, in order to protect their own industries.

In effect, commercially meaningful integration has not been done and it had little impact on developing countries. The importing countries can choose any product for integration, so long as the stipulated percentages are met. In other words, integration is required to take place in four stages. Each stage must include products for each of the four groups:

- tops and yarns
- fabrics
- made-up textile products
- clothing

It is up to the importing country which items are selected within each group. An analysis of the integration process in the first three stages shows that both the EU and the US added some minor products to the lists (items such as umbrellas, car seat belts, dolls' clothes and parachutes) and cut back on the under-used quotas, in order to raise the starting point. Thus, it has not led to the removal of restrictions on any item, under specific restraint from India. They have mostly integrated products on which there were no quota restrictions at the first place during the stages. Therefore, effective phase-out of quotas has been minimal in the three stages till January 1, 2002. It means that most of the quotas may continue up to December 31, 2004.

Although this is strictly within the rules, developing counties claim that it is not in the spirit of the agreement. The agreement has turned a full circle from being a 'back-loaded' to an 'end-loaded' arrangement. This alleged protectionism has a huge cost for consumers in both developed and developing countries, as was witnessed in the MFA era. In other words, consumers in developing countries are denied the opportunities to raise their income, thereby preventing them to raise their standard of living, and in developed countries, consumers have to unnecessarily bear a higher cost of clothing.

Box 3: The Cost of Protectionism on Northern Consumers

The MFA is one of the best-documented examples of how consumers lose out when producers are excessively protected. The price of textiles and clothing continues to be maintained at artificially high levels in Europe and North America.

In 1993, the GATT secretariat estimated that price protection for textiles and clothing cost each household US$200-420 per annum in the US and US$130 in the UK.

When Sweden dismantled its MFA quotas, Swedish consumers were able to buy double the quantity of goods for the same money.

A US study calculated the cost of MFA at US$40bn, or US$500 per household in 1986.

A UK study, published in 1989, estimated the cost of the MFA to be US$1600mn a year, or around five percent of retail prices.

So, it can be roughly assumed that the extra cost to consumers due to protectionism in developed nations was *per se* more than the actual traded volume.

Source: Textiles and Clothing – Who Gains, Who Loses and Why! By Pradeep S. Mehta, CUTS Briefing Paper No. 5, 1997.

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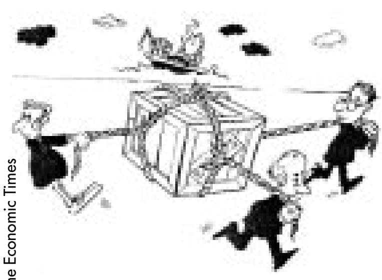

The Economic Times

When will the Agreement on Textiles and Clothing be terminated? Is there a possibility of postponing the textiles & clothing quota elimination?

The Agreement on Textiles and Clothing (ATC) explicitly provides for its own termination. The agreement and all the restrictions covered by it shall stand terminated on 1 January 2005, the date on which the textiles and clothing sector shall be fully integrated into GATT 1994. The Agreement on Textiles & Clothing concludes that:

> "This Agreement and all restrictions thereunder shall stand terminated on the first day of the 121st month that the WTO Agreement is in effect, on which date the textiles and clothing sector shall be fully integrated into GATT 1994. There shall be no extension of this Agreement."

One common complaint about the MFA was the ease with which it could be extended. The drafters of the ATC have accordingly provided that the ten-year transition period of the ATC cannot be extended.

Thus, one hope that the quota regime will indeed come to an end from 1st January 2005. However, this by no means can be taken for granted. This is because the above extract from the ATC does not preclude a new agreement being reached.

Further, there are some recent signals that are clouding the picture. A number of countries, such as Turkey and Bangladesh that currently export textiles under quotas to developed countries, are afraid they will lose their markets to cheaper products under a liberalised scheme and are calling for a three-year extension of quotas up to 2007 under the WTO Agreement on Textiles and Clothing.

But, the WTO officials have maintained that there will be no reprieve for the decade-old textile quota system that is due to wind up at the end of the year 2004. The US, the EU and Canada have already formally notified the WTO of their plans to eliminate all remaining import quotas by the end of 2004.

Box 4: The fear of the China Factor

Since December 2001, China has been a member of the WTO and enjoys a range of benefits. These benefits include the 2005 quota phase-out; automatic quota increases as stipulated in the ATC; and the growth-on-growth provision whereby, under the ATC and as a new WTO member, the country receives benefits accorded to other member countries during the past seven years.

These changes have had a tremendous impact on China's performance in the major importing markets. For example, the US textiles and clothing imports from China increased by 125 percent in 2002, a trend confirmed in the first three months of 2003. In the same period, apparel exports increased by 60 percent. Chinese exporters reduced their prices, in order to gain a greater share in the market. They were able to do so, among other reasons, because quota rents were reduced and Chinese enterprises increased their productivity by investing heavily in new machinery and technology.

The impact of the vast increase in Chinese exports can already be seen in the quota-free Japanese market. In 2001, Japan imported more than two-thirds of its total garment requirements from China, an increase of 66 percent over ten years. If the Japanese example were repeated in other markets, it would create deep concerns for many exporting countries, especially the smaller ones.

Many developing country garment manufacturers speculate that the United States and the EU might reintroduce quotas on China's textile and clothing exports, a move that is possible under China's WTO accession protocol. WTO members can introduce transitional safeguard measures specifically against Chinese textile and clothing imports until 31 December 2008, if Chinese imports "threaten to impede the orderly development of trade in these products". No notification to the WTO is needed in this case.

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On top of that, members can introduce product-specific safeguards against any product (including textile and clothing products) until December 2013, in case of market disruption.

In this case, however, they need to notify the WTO Committee on Safeguards and reach an agreement with China. Such speculation, however, is dangerous for two principal reasons. First, major importing countries will use such safeguards only to protect their national industries, rather than to protect any other developing country producer. Second, China could also consider retaliation, if the EU and the United States re-impose quotas. Countries will think twice before risking their export opportunities to the large Chinese market.

Source: Matthias Knappe, International Trade Forum (Quarterly Magazine of the ITC) Issue 2/2003.

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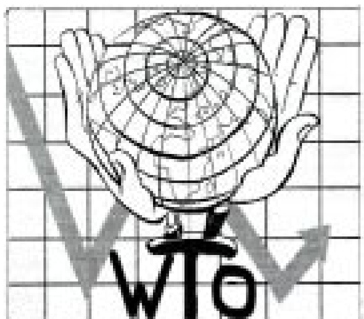

The Economic Times

Will trade in textiles & clothing be completely free after 2004?

No, trade in T&C will not be completely free. By the end of a transition period of ten years (1995-2004), quota arrangements will end. Thereafter, restrictions will normally be limited to tariffs, which will be kept in line with WTO discipline.

After 2004, trade in textiles and clothing will then follow regular WTO rules, just the way they are observed in other non-agricultural products like leather, stones and gems, etc.

Paragraph 1 of Article7 of the Agreement on Textiles & Clothing states:

> 1. As part of the integration process and with reference to the specific commitments undertaken by the Members as a result of the Uruguay Round, all Members shall take such actions as may be necessary to abide by GATT 1994 rules and disciplines so as to:
> - achieve improved access to markets for textiles and clothing products through such measures as tariff reductions and bindings, reductions or elimination of non-tariff barriers and facilitation of customs, administrative and licensing formalities;
> - ensure the application of policies relating to fair trading conditions as regards textiles and clothing in such areas as dumping and anti-dumping rules and procedures, subsidies and countervailing measures and protection of intellectual property rights; and

- avoid discrimination against imports in the textiles and clothing sector when taking measures for general trade policy reasons.

Such actions shall be without prejudice to the rights and obligations of Members under GATT 1994.

Box 5: Features of Textiles and Clothing Sector

- Clothing and textiles employ at least 40 million people worldwide
- Manufacturing generates trade worth at least $350 billion a year
- More than 30 countries exports are controlled by quotas
- Removal of quotas is forecast to benefit China the most, followed by India
- US clothing importers expect to buy most of their goods from five or six countries by 2007, down from about 50 today

Economists at the World Bank and International Monetary Fund say barriers to textiles and clothing trade have cut world income by $137 billion annually. They estimate the cost to developing countries at $40 billion in lost export revenues and 27 million jobs foregone – or 35 jobs for every one saved in rich nations.

Source: The textile earthquake by Guy de Jonquieres, The Financial Times, 24.07.04

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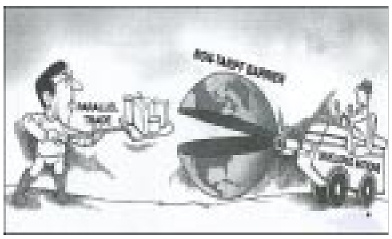

Business Line

What could be the likely non-tariff barriers to hinder trade in textiles & clothing after 2004?

One potential threat to future trade in textiles and clothing is the replacement of quotas and tariffs with non-tariff barriers (NTBs). In particular, environmental protection might be used to restrict imports. The use of restrictions under the guise of technical barriers to trade (TBT) may increase at the government level. In addition, since the use of trade remedial measures is already on a higher side in the international trade, their use might increase all the more as protectionist measures.

Countries such as the European Union (EU) and the United States of America perceive almost all the export promotion strategies of the Government of India as WTO inconsistent. (Bhattacharyya B. "Non-Tariff Measures on India's Exports: An Assessment", Indian Institute of Foreign Trade, New Delhi) This is reflected in the high number of countervailing duties imposed mainly by the EU and the USA. It can be seen that, over the years, such measures have increased from a total of 16 in 1997 to 36 in 1999. The use of these NTBs might increase all the more after the year 2004, to block access to these markets.

The existence of non-standardised national schemes is another serious barrier to access to foreign markets. The issue of linkage between trade and labour standards and child labour can have the potential of being yet another NTB, thereby denying access in the north to the products of developing countries.

Box 6: Examples of NTBs in USA	
Flammable fabrics	Any article of wearing apparel, fabric or interior furnishing, cannot be imported into the US, if it fails to conform to an applicable flammability standard issued under the Flammable Fabrics Act. These flammability standards cover general wearing apparel, children's sleepwear, mattresses (including futons) and carpets and rugs.
Stamped, tagged and labelled	All textile fibre products imported into the United States shall be stamped, tagged, labelled, or otherwise, they are to be marked with certain information as required by the Textile Fibre Products Identification Act.
Textile visa and export license requirements	A textile visa is a stamp on an invoice or export control license that is executed by a foreign government. A visa does not guarantee entry of the merchandise into the US. If the quota closes between the time the visa is issued in the foreign country and the shipment's arrival in the US, the shipment will not be released to the importer until the quota opens again. This is used to control the exportation of textiles and textile products to the US and to prohibit the unauthorised entry of the merchandise into this country. A visa may cover either quota or non-quota merchandise. Conversely, quota merchandise may or may not require a visa, depending upon the country of origin.
Wool	Any product containing woollen fibre imported into the United States shall be tagged, labelled, or, otherwise, they are to be marked with certain information as required by the Wool Products Labelling Act of 1939. For example, information like providing percentage of total fibre weight of the wool product, the maximum percentage of the total weight of the wool product, of any non-fibrous loading, filling, or adulterating matter etc.

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Fur	Any article of wearing apparel imported into the United States and made in whole or in part of fur shall be tagged, labelled or, otherwise, it is to be marked with certain information as required by the Fur Products Labelling Act. For example; information like providing the name of the manufacturer or person introducing the product in commerce in the US; i.e., importer, the name or names of the animal or animals that produced the fur as set forth in the Fur Products Name Guide and as determined under the rules and regulations, information like whether the fur product is bleached, dyed, or otherwise artificially coloured etc.

Box 7: Examples of NTBs in the EU	
Dyestuffs	Benzendine-based dyestuffs, azo-dyes based on other aromatic amines and dyes containing, or consuming, heavy metals must not be used. Formaldehyde is another chemical that is not permitted in baby clothes and the substance should be avoided to the greatest extent possible in other types of textiles. In Germany, a compulsory labelling of formaldehyde is required in excess of 1500 mg/kg since 1986. There is also ban on the use of pentachlorophenol (PCP), a chemical used in the processing of textiles. Other substances that should be avoided are heavy metals, such as cadmium (prohibited in clothes and accessories) as well as chromium and nickel, which can be found in buttons, zippers or shiny studs.
Flammability	Clothes exported should not be hazardous in any way. Neither should they be easily inflammable. Particular care should be taken with very thin garments based on cotton fibres or cellulose fibres, such as viscose, and raised fabrics which can easily catch fire. The material is less flammable, if it contains polyester or polyamide. There is ban on the use of carcinogenic substances to reduce the flammability of fabrics.

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Capable of being washed	Clothes marketed in the EU should, preferable, be capable of being washed. Dry cleaning is today relatively expensive. As from January 1, 1995, dry cleaning with CFC freon F is prohibited.
Specification of fibre important	Legislation regarding the country of origin of the garment has been replaced by legislation requiring specification of the fibre content. According to the regulation, it is important that the fibre specification is correct.
Bleaching agents	No bleaching agents containing chlorine or chlorine-containing compounds must be used during wet treatment.
Occupational conditions	In compliance with 89/391/EEC, a written assessment of the risks to safety and health at work, including those facing groups of workers exposed to particular risks, must be submitted as part of the application. The occupational exposure to cotton dusts should at all life-cycle stages be less than 0.2 mg/m^2. The occupational exposure to noise at all stages of the life cycle must not exceed 85dB.
Flame retardants	Flame-retardants based on heavy metals or halogenated substances must not be used. Furthermore, flame-retardant systems and crease-resistant finishes releasing formaldehyde must not be used.
Pesticides and other chemicals	No pesticides and other chemicals used during cotton growing considered hazardous to health or the environment must be used. They also must not contain heavy metals.
Lubricants, detergents and complexing agents	Only mineral oils of pharmaceutical quality must be used in the spinning, knitting and weaving processes. No surface-active agents where the degradation results in formation of stable toxic metabolates must be used (e.g., alkylphenolethoxylates). BTA (hydrogenated tallow alkyl), DTDMAS, DSDMAC and DHTDMAC must not be used. NTA and EDTA must not be used.

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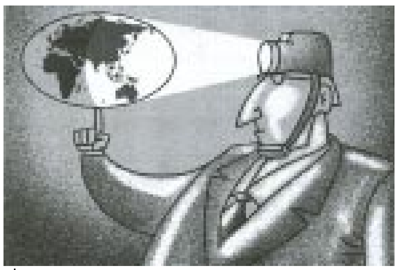

The Economic Times

What could be the likely impact of the elimination of textiles & clothing quotas?

It is difficult to predict what the effects of the ATC will be when all the quotas are removed at the end of the phase-out period. It is not even certain how much market access this will create, since the agreement does not relate to tariff barriers and many are suspicious that importing countries will find alternative means of protectionism. Both the USA and the EU will also continue to give preferential treatment to certain less developed countries.

Nevertheless, it is clear that the removal of quotas will mean changes in the location of the industry. A less controlled system will mean that both countries and companies will be in more direct competition to supply the world market. This will have implications for workers everywhere.

Apart from this, several studies have examined the implications of the abolition of the MFA for South Asia. They concluded that South Asia, in total, would be a significant beneficiary from the abolition of the MFA.

The abolition of quotas will not only create opportunities for developing countries but will also expose them to additional competition from each other and other formally restrained exporters. The outcome for any individual country will depend heavily on its policy response. The countries that take the opportunity to streamline their policies and improve their competitiveness are likely to increase their gains from quota abolition. Brief excerpts from selected studies are produced in the following Box 7. Box 8 indicates the implications for different countries, in general.

Box 7: Overall Impact of the Elimination of T&C Quotas on Asia

Kathuria *et al* finds that some of the gains would come from an increase in the scale of the industry experiencing productivity gains. Another important source of gains would be a reduction in the terms of trade losses associated with increased textile and clothing exports. Following the removal of the quotas, important parts of world textile and clothing markets would be much more price responsive. Overall gains of around US$2bn per year were found alone from increasing productivity by 67 percent in the clothing sector, to bring it roughly in line with China.

There had been a slow pace of reform in this sector in the past, when opportunities were restricted. However, to do so in future would mean missing out on potentially much greater direct gains from productivity improvements. In addition, it would expose these industries to much risk of losing ground in a fiercely competitive world market. Finally, as trade barriers start coming down, following the WTO negotiations, for example in India, the industries would also face substantially increased competition in their home markets, which lends an urgency to domestic policy reform. *Sanjay Kathuria, Will Martin, and Anjuli Bhardwaj: Implications for South Asian Countries of Abolishing the Multifibre Arrangement, presented at the NCAER-World Bank WTO 2000 South Asia Workshop, December 20-21, 1999, at New Delhi.*

The study by Hertal *et al.* concludes that the gains to the region would be around US$2bn per year. These results point to substantial overall gains that are likely to be greater, if anything, today than they were estimated to be in 1996. This would be because of the increases in export tariff and the completion of regional arrangements (NAFTA and Europe/Central Europe/ Turkey) that have caused trade diversion away from South Asia. Abolition of the quotas will also greatly increase the returns from domestic industry.

Abolition will also increase the urgency for South Asian countries to improve productivity in these sectors, since countries that do not reform to increase their efficiency will face greatly increased competitive pressure, as other exporters, currently repressed by the quotas, will also be liberalised. *Hertal T., W. Martin, K.Yanagishima, and B. Dimaranan,(1996): "Liberalising Manufactures Trade in a Changing World Economy", in W. Martin, & L. Alan Winters (eds). "The Uruguay Round and the Developing Countries", Cambridge University Press, Cambridge.*

Box 8: Implications of the Elimination of T&C Quotas for Specific Countries

Some countries will gain from the ATC, whilst others will lose. The general assumption is that there will be an increase in the movement of the garment industry from the North to the South, i.e., from the industrialised countries in Europe and North America to the poorer, less industrialised countries. However, the situation is more complicated than this and the greatest relocation could be from one relatively poor country to another. The MFA did have the effect of guaranteeing a Northern market to a wide range of poor countries. Without the MFA, there will be a more open market and the overall result is likely to be a concentration of the industry in a smaller number of low cost locations. Marginal suppliers are likely to be squeezed out. Asia will experience the greatest changes in the distribution of production.

In a more open market, the relative competitiveness of countries depends mainly on:

- wage costs;
- supply of fabric, yarn and other materials;
- infrastructure for transport and marketing; and
- nearness to markets.

On this basis, the general prediction is as follows:

S. No	Country	Predicted Impact
1.	**China**	It has the highest predicted growth. Not only does China have a huge low cost labour force, it also has its own textile industry and will benefit from Hong Kong's well established financial and marketing expertise. China is already emerging as a dominant supplier, in spite of high quota restrictions. At present, *China** is not a member of the WTO and is, therefore, not entitled to the liberalising provisions of the ATC. However, once it does join up, it will be entitled to the same treatment as other countries.
2.	**India and Pakistan**	They are predicted to benefit on the basis of low wage costs and access to domestically produced fabrics.
3.	**Korea**	It is also seen as having the advantages of its own (especially synthetic) fabrics, together with high productivity and overall efficiency.

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4.	**Bangladesh**	It is expected to lose. Bangladesh is the clearest example of a country that developed a garment industry as a direct result of the MFA and other trade agreements. Bangladesh has had free access to the EU markets and the US also gave Bangladesh sizeable quotas, so that it became a major supplier to both the American market and the European markets. Once quotas are removed, Bangladesh is expected to suffer from its lack of textile industries and its poorly developed infrastructure.
5.	**Thailand, Sri Lanka and the Philippines**	They may also lose, since they depend on imported fabric and on marketing/buying groups over which they have no control. Some predict that they will be unable to compete with even lower cost producers, such as Vietnam.
6.	**Central America and Mexico**	They are well placed to benefit in a more open market. Low wage levels and the proximity to the US market mean that the industry is certain to flourish after the end of the phase- out period. Haiti will also continue to have the competitive advantage of low wage costs.
7.	**Africa**	It is not likely to be greatly affected, since clothing is not an important export.
8.	**Mauritius**	It is the exception, since it is an example of a quota-related industry lacking any kind of domestic base. It is, therefore, likely to be amongst the losers. However, it is already investing in outward processing, notably in Madagascar.
9.	**Turkey**	It is likely to continue as a major supplier to the European market. It has abundant access to cotton and quick turnaround times.
10.	**Greece, Portugal and other less rich countries within the EU**	They may lose out with the opening up of the European market.

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11.	**Eastern ` Europe**	It has already gained a substantial share of the European market and is predicted to increase this with the MFA phase out. East European countries have the advantage of low costs and high quality, combined with nearness to the market. There are also political reasons for increasing trade within the European continent.
Source: Phasing Out the Multi Fibre Arrangement – What Does It Mean for Garment Workers? Angela Hale, March 2000. Education material for Transport and General Workers' Union (T&G) under the T&G Membership Education in International Development. Website: www.tgwv.org.uk ***** *China is now a member of the WTO. It formally got its membership in the year 2001 as a 143rd member of the WTO.*		

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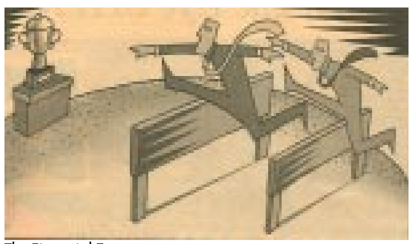

The Financial Express

What is being done to improve the competitiveness of the Indian textile & clothing Industry?

The textile industry in India is preparing to meet the competition expected in the post-MFA era. In conjunction with other ongoing programmes, it has announced the National Textile Policy, 2000 (adopted by the Ministry of Textiles, Government of India), in November 2000. Several steps for modernisation and investment in the sector have been taken, in order to achieve the objectives of the Policy. A Steering Group on Investment and Growth in the Textile Industry has been constituted. An Inter-Ministerial Task Force has also been constituted to suggest measures for ensuring adequate flow of funds to the textile industry.

The Government is trying to help the industry to meet the situation and has initiated a number of favourable schemes. Not only have schemes been launched to strengthen the T&C sector to beat post-MFA competition at the international market but simultaneously other schemes have been started to prepare the sector to face increasing competition in the home markets as well. Some of the schemes are as follows:

- In order to provide easy access to raw materials required for export production, the Government has recently introduced a scheme of granting Annual Advance Licences by which exporters can continue to import their input requirements throughout the year and, simultaneously, export garments made out of them. This scheme will reduce the transaction time and cost so as to enable the garment exporters to devote themselves to the job of producing and exporting their products.

- Various types of trimmings and embellishments have been allowed to be imported by the industry free of licences and import tariffs. Arrangements are also being worked out by taking policy initiatives so that quality fabrics produced by the mill sector in India are made available to the garment makers.

- A scheme of setting up Apparel Parks is being worked out whereby the State Governments will be asked to set up such Parks in areas which are near the existing garment production centres as well as the fabric trading or manufacturing industries, so that garment exporters can set up and relocate their manufacturing facilities to places where they can get cheaper labour and cut down costs. This cluster development approach will enable the Apparel Parks to be used as an instrument for guiding technology upgradation and export culture.

- A Technology Upgradation Fund Scheme has been launched with effect from April 1999, with a view to making the Indian textile industry globally competitive and bring in the desired level of investment for the technological upgradation of the textile sector, covering spinning, weaving, processing and the garment manufacturing sectors.

- The key areas of infrastructural concern for textiles are ports, power (both availability and price), highways, telecommunications and FDI. Certain steps have been taken to encourage private investment in segments like ports (on build-operate-transfer basis), power generation and distribution etc.

- Woven segments of readymade garments have been de-reserved from the SSI sector. SSI investment limit for hosiery and knitwear sectors has been enhanced from Rs. one crore to Rs. five crore. This could help provide the Indian industry a level playing field to compete against imported garment and knitted products and face the post-quota regime in 2005. This would also help in attracting foreign direct investment and joint ventures, besides resulting in proper utilisation of the Textile Up-gradation Fund Scheme.

- The competitiveness of the domestic industry has to be strengthened to withstand the increased import of textile products. Therefore, a detailed view of various issues relating to the domestic textiles industry, such as excise and other duties applicable to raw material, infrastructural problems, interest rates, etc., has been considered to be undertaken for revamping, in order to increase the competitiveness of the domestic textile industry.

Box 9: Examples of some other schemes	
Technology Mission on Cotton	Considering the importance of the cotton crop in the national economy, the Government launched a Technology Mission on Cotton (TMC) in February 2000 to address the issues of low productivity and contamination.
Modernisation of the Weaving Sector	Pursuant to the textile package, a programme for modernisation of the decentralised powerloom sector by 2004, has been drawn up. The coordination of the State governments has been emphasised; Small Industries Development Bank of India (SIDBI) and other banks are being drawn into the programme.
Introduction of New Package for High Quality Silk	Development of a sericulture package for gradeable quality of bivoltine mulberry silk has added to the prospects of the industry. This is hoped to bring a significant rise in production and quality of silk.
Baba Saheb Ambedkar Hastshilp Vikas Yojana	A new scheme 'Baba Saheb Ambedkar Hastshilp Vikas Yojana' has been formulated, which has adopted an essentially people-centric approach and involves mobilisation of the artisan community in important craft clusters all over the country into self help groups and thrift & credit societies.
Deen Dayal Hathkargha Protsahan Yojana	The Government launched an integrated and comprehensive scheme, 'Deen Dayal Hathkargha Protsahan Yojana' in April 2000, to provide assistance to the entire gamut of handloom sector activities, like product development, infrastructure and institutional support, training to weavers, supply of equipment and marketing support etc., for weavers within or outside the cooperative fold, both at the micro as well as the macro level. The scheme will be in operation by the end of the 10th Five Year Plan. The outlay envisaged is Rs. 690 crore, involving a Central share of Rs. 360 crore to be given to State governments on submission of project proposals.

Jute	For ensuring the percentage of mandatory packaging in jute bags for sugar and foodgrains to 100 percent each, the Government issued an order on September 1, 2001, under the Jute Packaging Materials (JPM) Act 1987. Urea had been excluded from the purview of the JPM Act. In October 2001, the Government directed all manufacturers of jute textiles to mark the country of manufacture/origin of specified items of jute textiles.
Special Incentives for Textile Sector in North Eastern Region	Following the adoption of the Prime Minister's Package for development of the North-Eastern region, special focus is being given to implementation of textiles and textile-based activities, like handicrafts, handlooms, sericulture and jute in the North-Eastern Region.
Ongoing Plans	Action has been initiated on following three points relating to Prime Minister's 15 important initiatives announced on Independence Day 2002: • Rs. 100 crore for a one-time special rebate on handloom fabrics to kick-start the employment intensive industry and revive its production cycle. • An additional Rs. 125 crore for skill upgradation of one lakh handloom weavers. • A special contributory insurance scheme for one million weavers and artisans, which will combine the Jan Shree Bima Yojana with group insurance. Last but not the least, brand image building is being taken up as a part of international market strategy.
Source: India & the WTO, Volume 1 No. 8, A monthly newsletter of the Ministry of Commerce, Government of India, August 1999.	

'CUTS' PUBLICATIONS

TRADE AND DEVELOPMENT

STUDIES

1. **Environmental Conditions in International Trade**
   A study on the impact on India's exports in the area of Textiles and Garments including Carpets, Leather and Leather Goods, Agricultural and Food Products including Tea and Packaging, for the Central Pollution Control Board, Ministry of Environment & Forests, Government of India.
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   The social clause issue has remained one of the most heated areas of international debate for a number of years. The study says that the quality of that debate has not met its volume and the real issues underlying the issue have rarely been analysed as a whole. It attempts to string the various debates together. *(Rs.100/US$25) ISBN 81-87222-01-8*

4. **Eradicating Child Labour While Saving the Child**
   In the scenario of a growing interest in banning child labour, this research report argues that trade restricting measures have every potential of eliminating the child itself. The report provides logical arguments and a case study for those groups who are against the use of trade bans for the solution of this social malaise. It also makes certain recommendations for the *effective* solution of the problem.
   (US$25/Rs.100) ISBN 81-87222-23-9

5. **Non-trade Concerns in the WTO Agreement on Agriculture**
   This research report, written by Dr. Biswajit Dhar and Dr. Sachin Chaturvedi of the Research and Information System for the Non-aligned and Other Developing Countries, New Delhi, provides a detailed analysis of non-trade concerns, covering the various dimensions indicated by the Agreement on Agriculture of the World Trade Organisation.
   (US$10/Rs.50) ISBN 81-87222-30-1

6. **Liberalisation and Poverty: Is There a Virtuous Circle?**
This is the report of a project: “Conditions Necessary for the Liberalisation of Trade and Investment to Reduce Poverty”, which was carried out by the Consumer Unity & Trust Society (CUTS) in association with the Indira Gandhi Institute for Development Research, Mumbai; the Sustainable Development Policy Institute, Islamabad, Pakistan; and the Centre for Policy Dialogue, Dhaka, Bangladesh, with the support of the Department for International Development, Government of the UK.
(US$25/Rs.100) ISBN 81-87222-29-8

7. **Market Access Implications of SPS and TBT: Bangladesh Perspective**
As both tariffs and other traditional trade barriers are being progressively lowered, there are growing concerns about the fact that new technical non-tariff barriers are taking their place, such as sanitary and phytosanitary measures (SPS) and technical regulations and standards.
The poor countries have been denied market access on quite a number of occasions when they failed to comply with a developed country’s SPS or TBT requirements, or both. The seriousness of this denial of market access is often not realised unless their impact on exports, income and employment is quantified.
In this paper, the author focuses on the findings of a 1998 case study into the European Commission’s ban of fishery products from Bangladesh into the EU, imposed in July 1997.
This research report intends to increase awareness in the North about the ground-level situation in poor and developing countries. At the same time, it makes some useful suggestions on how the concerns of LDCs can be addressed best within the multilateral framework. The suggestions are equally applicable to the developing countries.
(Rs. 100/US$10) ISBN 81-87222-69-7

8. **TRIPs and Public Health: Ways Forward for South Asia**
Trade Related Aspects of Intellectual Property Rights—or TRIPs—has always been one of the most contentious issues in the WTO. Several studies have been conducted on the political economy of TRIPS *vis-à-vis* WTO, the outcomes of which are crucial to the policymakers of the developing economies more than those in the rich countries. Increasing realisation of the poor countries’ suffering at the hands of the patent holders is yet another cause of worry in the developing and poor countries.
This research document tries to reach the answer to one specific question: what genuine choices do policymakers in South Asian developing nations now have, more so after the linkage between the trade regime and pharmaceuticals? Starting with a brief overview of the key

features of the corporate model of pharmaceuticals, the paper provides some insight into the challenges faced by the governments in South Asian countries. The aim is to anchor the present discussion of public health and the impact of TRIPs in the socio-cultural environment of this region.
(Rs.100/US$25) ISBN 81-87222-83-2

9. **Putting our Fears on the Table: Analyses of the Proposals on Investment and Competition Agreements at the WTO**
"Let them put their fears on the table and that should guide the negotiations." The UNCTAD Secretary General, Rubens Ricupero, made this comment just after the Doha ministerial meeting of the WTO held in November 2001.

He was referring to India's stand at Doha on the 'Singapore issues' and arguing that it was pointless in just opposing the 'new' issues at the WTO without putting forward constructive arguments.

"Putting our Fears on the Table" is the title of a recently published report of the CUTS Centre for International Trade, Economics & Environment. It provides analyses of the proposals on investment and competition agreements at the WTO, especially in the areas taken up and/or proposed at Doha for possible future negotiations.

This volume is a product of comprehensive research and dialogue of leading international experts, practitioners and other stakeholders. It will really help developing countries to comprehend and deal with the issues in the WTO context. *(Rs.300 for India/US$25 for OECD Countries/US$15 for other) ISBN 81-87222-84-0*

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This book is a product of the project, EU-India Network on Trade and Development (EINTAD), launched about a year back at Brussels. CUTS and University of Sussex are the lead partners in this project, implemented with financial support from the European Commission (EC). The CUTS-Sussex University study has been jointly edited by Prof. L. Alan Winters of the University of Sussex and Pradeep S. Mehta, Secretary-General of CUTS, India.

The five issues discussed in the book are Investment, Competition Policy, Anti-dumping, Textiles & Clothing, and Movement of Natural Persons. Each of these papers has been co-authored by eminent researchers from Europe and India. *(Rs.350/US$50)* ISBN 81-87222-92-1

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This research report attempts to emphasise on the relevance of GATS for developing economies, particularly in South Asia. It also examines the potential gains from trade liberalisation in services, with a specific focus on hospital services, and raises legitimate concerns about increases in exports affecting adversely the domestic availability of such services. It highlights how the ongoing GATS negotiations can be used to generate a stronger liberalising momentum in the health sector.
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Bipul Chatterjee and Raghav Narsalay analyse the impact of the GATT Agreements on developing countries. The analyses takes stock of what has happened at the WTO until now, and flags issues for comments.
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(40pp, #0105, Rs.30/US$5)

5. **ABC of the WTO**
This monograph is about the World Trade Organisation (WTO) which has become the tool for globalisation. This monograph is an attempt to inform the layperson about the WTO in a simple question-answer format. It is the first in our series of monographs covering WTO-related issues and their implications for India. Its aim is to create an informed society through better public knowledge, and thus enhance transparency and accountability in the system of economic governance.
(36pp, #0213, Rs.30/US$5)

6. **ABC of FDI**
FDI — a term heard by many but understood by few. In the present times of liberalisation and integration of world economy, the phenomenon of Foreign Direct Investment or FDI is fast becoming a favourite jargon, though without much knowledge about it. That is why CUTS decided to come out with a handy, yet easy-to-afford monograph, dwelling upon the "hows" and "whys" of FDI. This monograph is third in the series of "Globalisation and India – Myths and Realities", launched by CUTS in September 2001. "How is FDI defined?" "What does it constitute?" "Does it increase jobs, exports and economic growth?" Or, "Does it drive out domestic investment or enhance it?" are only some of the topics addressed to in a layman's language in this monograph. *(48pp, #0306, Rs.30/US$5)*

7. ABC of TRIPs

This booklet intends to explain in a simple language, the Trade-Related Intellectual Property Rights Agreement (TRIPs), which came along with the WTO in 1995. TRIPs deals with patents, copyrights, trademarks, GIs, etc. and countinues to be one of the most controversial issues in the international trading system. The agreement makes the protection of IPRs a fundamental part of the WTO. This monograph gives a brief history of the agreement and addresses important issues such as life patenting, traditional knowledge and transfer of technology among others.
(38pp Rs. 50/$10, #0407) ISBN 81-8257-026-3

8. WTO Agreement on Agriculture: Frequently Asked Questions

As a befitting reply to the overwhelming response to our earlier three monographs, we decided to come out with a monograph on *WTO Agreement on Agriculture* in a simple question and answer format. This is the fourth one in our series of monographs on *Globalisation and India – Myths and Realities*, started in September 2001.

This monograph of CUTS Centre for International Trade, Economics & Environment (CUTS-CITEE) is meant to inform people on the basics of the WTO Agreement on Agriculture and its likely impact on India. *(48pp, #0314, Rs.50/US$10)*

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India had embarked upon the path of economic liberalisation in the early nineties in a major way. The process of economic liberalisation and the pursuit of market-driven economic policies are having a significant impact on the economic landscape of the country. The striking characteristic of this process has been a constant shift in the role of the state in economic activities. The role of the state is undergoing a paradigm shift from being a producer to a regulator and facilitator. A constant removal of restrictions on economic activities and fostering private participation is becoming the order of the day.

Keeping these issues in mind, CUTS, with the support of Oxfam GB in India, had undertaken a project on globalisation and the Indian informal sector. The selected sectors were non-timber forest products, handloom and handicraft. The rationale was based on the premise that globalisation and economic liberalisation can result in potential gains, even for the poor, but there is the need for safety measures as well. This is mainly because unhindered globalisation can lead to lopsided growth, where some sectors may prosper, leaving the vulnerable ones lagging behind.
(48pp, #0401) ISBN 81-8257-017-4

10. ABC of GATS

The aim of the GATS agreement is to gradually remove barriers to trade in services and open up services to international competition. This agreement, reached during the Uruguay Round of the General Agreement on Tariffs and Trade (GATT), is perhaps the most important single development in the multilateral trading system since the GATT came into effect in 1947.

The structure of the GATS agreement is like an onion (the more you open, the deeper you go) and often described as 'development-friendly'. Each WTO Member can choose to commit which sectors to liberalise, when and to what extent. However, in reality, developing countries face tremendous commercial and political pressure to liberalise.

This monograph is an attempt to educate the reader with the basic issues concerning trade in services, as under GATS. The aim of this monograph is to explain in simple language the structure and implications of the GATS agreement, especially for developing countries.

(38pp Rs. 50/$10, #0416) ISBN 81-8257-032-8

GUIDES

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This book provides an easy guide to the main aspects of the Uruguay Round agreements in a way that is understandable for non-trade experts, and also contains enough detail to make it a working document for academics and activists. *(US$5, Rs.60)*

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Analyses of strategic and WTO-related issues under two broad heads: international agenda and domestic agenda. *(#9907)*

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Economiquity

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Our Briefing Papers inform the layperson and raise issues for further debate. These have been written by several persons, with comments from others. Re-publication, circulation etc. are encouraged for wider education. Contributions towards postage (Rs.5/$5) are welcome.

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