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2008年10月，非洲三大区域组织东南非共同市场（COMESA）、东非共同体（EAC）、南部非洲发展共同体（SADC）决定建立三方自由贸易区。2011年6月，三方举行峰会，正式启动相关谈判。本期选登两份资料，一为评估三方自由贸易区报告的简介，一为2011年6月三方峰会的会议通报。

Cape to Cairo - An Assessment of the Tripartite Free Trade Area

In recent years countries have increasingly become focussed on enhancing market access through regional integration in light of the stalled decade-long WTO Doha round of trade negotiations. Africa is no exception and in 2008, Heads of State and Government from the member states of the regional economic communities (RECs) of the Common Market for East and Southern Africa (COMESA), the East African Community (EAC) and the Southern African Development Community (SADC), agreed to establish a Free Trade Area (FTA). The aim of the FTA among others is to enhance market access, harmonise policies in areas of common interest and address the issue of multiple membership. This new configuration would see an expanded market covering 26 countries with an estimated population of 500 million people, a GDP of US\$624 billion and a per capita GDP of US\$1,184.

The objective for this book is to examine the trade and specifically agricultural production, agribusiness and the agricultural policy regimes in East and Southern Africa. A computer analysis of the benefits of the proposed is also presented, along with a review of sensitive products and non-tariff barriers in the region. Member states of SADC, EAC and COMESA are due to begin negotiations to establish the Tripartite FTA in 2011. Below is a summary of the key points from each chapter.

1. Agricultural production in the tripartite region

A special emphasis in this project is given to agriculture, and the objective for this Chapter is to examine agricultural production trends in the region as a basis for the subsequent analysis. This analysis makes extensive use of the United Nations Food

and Agriculture Organisation (FAO) data. The section starts by providing an analysis of agricultural production in Africa as a whole as well as in the tripartite region countries in order to place the tripartite countries in perspective before moving on to examine the individual countries and their associated commodities in more detail. The generalisation is that while Africa has done well with agricultural production per se it has not done so well on a per capita basis. The chapter ends with an analysis of undernourishment and food aid in the region.

2. Intra-African trade in Southern and Eastern Africa and the role of South Africa

The purpose of this chapter is to provide a background of agricultural trade in the region. . Any analysis of this nature needs to take into account the problem of regional data quality and timeliness, and for this reason a wide range of data sources have been investigated and, where possible, the best data for the specific components has been used.

The overall conclusion from detailed agricultural trade analysis of partner country exports to Africa is that the EU was by far the main supplier during 2009, but that along with the US its exports declined from the 2008 levels; that both the EU and US in particular show exports declining in 2009 over 2008; that most other countries have seen a greater export growth from 2000 than the EU and US; and that the main destinations are Algeria, Egypt, Nigeria and Sudan, with wheat, rice, palm oil, sugar, tea, milk powders and wine being the main products exported from the major sources examined.

3. The impact of agricultural policies in Africa

This chapter outlines the agricultural policy and trade settings for the individual countries of the tripartite grouping. It does this by examining these settings in each of the three major groupings of SADC, EAC and COMESA sequentially. In general, the major sources of information are:

- The WTO Trade Policy Review Mechanism (TPRM) documents that are published by the WTO about its members every few years;
- The seminal work on global agricultural policies undertaken by Kym Anderson and his colleagues at the World Bank (Anderson et al, 2009) and the individual country contributors to this study; and
- FAO trade and production data for agricultural products during 2009 using the top-20 production, export and import commodity lines to provide additional background information. While it is an underestimate of both production and trade in many instances, it is a consistent source across countries and augments the policy profiles.
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4. Agribusiness Opportunities

The modern focus of trade is to move past commodity trade and try to search out more value-added products that offer opportunities for producers, processors and traders. The objective of this chapter is to start that examination of implications for South Africa from regional integration. This has been done using the FAO trade database where there are 484 agricultural product lines listed for the latest complete data of 2007 to look at what the tripartite region is importing and what South Africa is exporting in order to get a preliminary idea of where some opportunities exist. The emphasis is on opportunities in the more distant EAC and COMESA markets because the SACU market is already integrated and SADC is hopefully moving in that direction with its own FTA. Conscious that the FAO database provides trade data only for agricultural outputs, World Trade Atlas data have been used for an indication of where opportunities may lie in the wider agribusiness input sectors. We also extent the definitions of ‘agribusiness’ to include goods generally associated with agricultural production, processing and marketing.

5. The GTAP modelling paper

In this chapter we examine the implications of the so-called tripartite countries of SADC, EAC and COMESA entering into a genuine free trade agreement (FTA). We use the Global Trade Analysis Project (GTAP) latest pre-release Version 8 database to

assess the welfare and trade gains from this FTA as determined by duty-free merchandise goods access and with a small (two percent) reduction in assumed non-tariff barriers to both merchandise goods and services barriers also factored in. Importantly, our simulation starts from the assumption that the three regional blocs of SADC, EAC and Comesa all have their FTAs operating in a comprehensive manner in that all three have tariff-free trade within their blocks but not for outside of their blocks. Thus, our results relate to combining these three blocks into one large tripartite FTA and not the adjustment process to reach this point. The updates made and assumptions used are detailed in the main chapter.

For the final tripartite agreement only the results show that there are significant gains to South Africa. Results for the rest of SACU (Lesotho, Namibia and Swaziland) are disappointing with a welfare loss of \$84 million, while Botswana similarly loses \$16 million. Most other tripartite partners gain or lose very marginally, excepting Mozambique which gains \$57 million. This is because most countries other than South Africa and Mozambique have access to other FTAs through their multiple membership of overlapping FTAs. All non-African countries outside of the agreement lose.

6. Sensitive Products

We note that the issue of sensitive products for exemption from tariff liberalisation in the different countries/regional groupings may become an area of contention in the tripartite FTA negotiations, simply because much of the basis for this exemption designation is likely to be arbitrary, and the sensitive products are more likely to reflect protectionist interests or rent-seeking behaviour, both of which will perpetuate inefficiencies.

This chapter provides an overview on what motivates countries to seek for flexibilities for certain products from full liberalisation. The chapter concludes by highlighting the need for policy makers to find ways to develop a systematic approach to determining sensitive products and to ensure that all stakeholders are aware of the purpose of a sensitive products list. The current list of sensitive products reflects poorly on the desire to establish a CU with a CET, to which all the RECs have or aspire to attain.

7. Non-tariff barriers in the EAC-COMESA-SADC Tripartite FTA

Successive round of Multilateral Trade Negotiations have led to a decrease in the use of tariffs as barriers to trade. However, the reduction in tariffs has been substituted by the utilisation of non-tariff barriers, which are the basis of this Chapter.

The chapter highlights the most prevalent NTBs hindering regional trade in the tripartite territory. These include customs procedures and administrative requirements, technical standards, government participation in trade and the lack of physical infrastructure.

The chapter concludes by highlighting that in order to enhance regional development and promote intra-regional trade the tripartite member states need to intensify efforts to address NTBs on a regional basis.

Communiqué: Second COMESA-EAC-SADC Tripartite Summit

The Heads of State and Government of the Common Market for Eastern and Southern Africa (COMESA), the East African Community (EAC) and the Southern African Development Community (SADC) Tripartite met on 12 June 2011 and:

(i) LAUNCHED negotiations for the establishment of an integrated market of 26 Countries with a combined population of nearly 600 million people and a total Gross Domestic Product (GDP) approximately US\$1.0 trillion;

(ii) NOTED that the region makes up half of the African Union (AU) in terms of membership and just over 58% in terms of contribution to GDP and 57% of the total population of the African Union. The establishment of a Tripartite Free Trade Area will bolster intra-regional trade by creating a wider market, increase investment flows, enhance competitiveness and develop cross-regional infrastructure;

(iii) ADOPTED a developmental approach to the Tripartite Integration process that will be anchored on three pillars namely: Market integration based on the Tripartite Free Trade Area (FTA); Infrastructure Development to enhance connectivity and reduce costs of doing business as well as Industrial development to address the productive capacity constraints; and

(iv) AGREED that the Tripartite initiative is a decisive step to achieve the African vision of establishing the African Economic Community envisioned in the Lagos Plan of Action and the Final Act of Lagos of 1980, Abuja Treaty of 1991 as well as the resolution of the African Union Summit held in Banjul the Gambia in 2006 that directed the African Union Commission and the Regional Economic Communities (RECs) to harmonize and coordinate policies and programmes of RECs as important strategies for rationalization; and to put in place mechanisms to facilitate the process of harmonization and coordination within and among the RECs.

2. The Tripartite Summit:

i) SIGNED the Declaration Launching the negotiations for the establishment of the COMESA-EAC-SADC Tripartite FTA;

ii) ADOPTED the Roadmap for Establishing the Tripartite FTA;

iii) ADOPTED the Tripartite FTA Negotiating Principles, Processes and Institutional Framework; and

iv) DIRECTED that a programme of work and roadmap be developed on the industrialisation pillar.

3. The Tripartite Summit was attended by the following Heads of State and Government:

1. His Excellency Pierre Nkurunziza, President of the Republic of Burundi
2. His Excellency Essam Abdel-Aziz Sharaf, Prime Minister of the Arab Republic of Egypt
3. His Excellency Mwai Kibaki, President of the Republic of Kenya
4. The Rt. Honourable Pakalitha Mosisili, Prime Minister of the Kingdom of Lesotho
5. His Excellency Bingu wa Mutharika, President of the Republic of Malawi
6. His Excellency Hifikepunye Pohamba, President of the Republic of Namibia
7. Right Honourable Bernard Makuza, Prime Minister of the Republic of Rwanda
8. His Excellency Jacob Zuma, President of the Republic of South Africa
9. His Majesty King Mswati III, of the Kingdom of Swaziland
10. His Excellency Jakaya Kikwete, President of the United Republic of Tanzania
11. His Excellency Yoweri Museveni, President of the Republic of Uganda
12. His Excellency Robert Mugabe, President of the Republic of Zimbabwe.

4. The following Plenipotentiaries represented the Heads of State and Government of the following countries:

1. His Honour Lt. General Mompoti S. Merafhe, Vice President of the Republic of Botswana
2. His Excellency Danny Faure, Vice President of the Republic of Seychelles
3. His Honour George Kunda, Vice President and Minister of Justice of the Republic of Zambia

4. Honourable Georges Rebelo Chikoti, Minister of External Affairs of the Republic of Angola
 5. Honourable Raymond Tshibanda, Minister of Cooperation, Democratic Republic of Congo
 6. Honourable Abdi Ilmi Achkir, Minister of Commerce, Republic of Djibouti
 7. Honourable Stifanos Habte Ghebremariam, Minister of Trade and Industry, State of Eritrea
 8. Honourable Ahmed Shide, State Minister for Finance and Economic Development, Federal Democratic Republic of Ethiopia
 9. Honourable Dr. Arvin Boolell, Minister of Foreign Affairs, Regional Integration and International Trade, Republic of Mauritius
 10. Honourable Paulo Francisco Zucula, Minister of Transport and Communications, Republic of Mozambique
 11. Honourable Dr. Mustafa Osman Ismail, Advisor to the President, Republic of Sudan
 12. His Excellency Khalifa Omar Swiexi, Ambassador and Plenipotentiary of the Socialist People`s Libyan Arab Jamahiriya accredited to Zambia
 13. Mr. Djamal Djanffar Charge d` Affaires and Plenipotentiary of the Union of the Comoros in South Africa
5. The following Organizations attended the Tripartite Summit as observers: the African Union Commission, African Development Bank, United Nations Economic Commission for Africa, Department for International Development of the United Kingdom and the Southern African Customs Union.
 6. His Excellency, Jacob Gedleyihlekisa Zuma President of the Republic of South of Africa, in his official opening remarks, welcomed all the Heads of State and Government, all dignitaries and delegates to the Second Tripartite Summit.
 7. The Secretary General of COMESA, on behalf of the COMESA, EAC and SADC Tripartite Task Force, in his opening remarks provided the progress made in the Implementation of the Decisions of the First Tripartite Summit.
 8. His Majesty, King Mswati III of the Kingdom of Swaziland, His Excellency Pierre Nkurunziza, President of the Republic of Burundi and His Excellency Hifikepunye Pohamba, President of the Republic of Namibia, the Chairpersons of COMESA, EAC and SADC Summits of Heads of State and Government respectively, addressed the

Tripartite Summit reiterating the commitment of the three Regional Economic Communities to the Tripartite cooperation and integration process.

9. His Excellency Erastus Mwencha, Deputy Chairperson of the African Union Commission also made opening remarks appreciating and giving support to the COMESA-EAC-SADC Tripartite cooperation within the framework of establishing the African Economic Community and the overall African Union Vision and Strategy.

10. The Tripartite Summit was opened and chaired by the Chairperson of the Summit of the Southern African Development Community assisted by the Chairpersons of the Summits of Common Market for Eastern and Southern Africa and the East African Community and the Tripartite Task Force of the three Secretariats was the Rapporteur.

11. The Tripartite Summit REVIEWED the progress made in the implementation of the decisions of the First Tripartite Summit held in Kampala, Uganda on 22nd October 2008, regarding programmes in trade, customs and economic integration; free movement of business persons and infrastructure development amongst the three RECs.

12. In the area of Infrastructure Development, the Tripartite Summit:

i) NOTED the progress made in the implementation of the Tripartite Infrastructure programmes;

ii) COMMENDED the international cooperating partners and the donor community for the support that was pledged to the North South Corridor at the High Level Conference held in Lusaka, Zambia in April 2009; and

iii) INVITED the cooperating partners and the donor community to Support the Aid for Trade Programmes being developed for the other major corridors and in particular the Tripartite and Inter-Governmental Authority on Development (IGAD) Infrastructure Investment Conference to be held in Nairobi, Kenya on 29 and 30 September 2011 at which priority projects for these corridors will be presented as well as the maritime corridors.

13. With regard to the Legal and Institutional Framework, the Tripartite Summit NOTED with appreciation that the Chairpersons of COMESA, EAC and SADC, these being His Majesty King Mswati III, His Excellency Dr. Jakaya Mrisho Kikwete and His Excellency Hifikepunye Pohamba respectively, signed the Memorandum of Understanding on Inter-Regional Cooperation and Integration amongst COMESA, EAC and SADC and that the Tripartite Memorandum of Understanding (MoU) came into force on 19 January 2011.

14. The Tripartite Summit EXPRESSED its appreciation to the COMESA-EAC-SADC Tripartite Task Force for the preparatory work undertaken in preparation for the 2nd Tripartite Summit.

15. The Tripartite Summit WELCOMED His Excellency Essam Abdel-Aziz Sharaf, Prime Minister of the Arab Republic of Egypt.

16. The Tripartite Summit NOTED AND WELCOMED the offer by the Arab Republic of Egypt to host the Third Tripartite Summit.

17. The Tripartite Summit, in a vote of thanks moved by His Excellency Essam Abdel-Aziz Sharaf, Prime Minister of the Arab Republic of Egypt, EXPRESSED appreciation to His Excellency Jacob Zuma, President of the Republic of South Africa, the Government and people of South Africa, for the warm and fraternal hospitality extended to all the delegations.

18. His Excellency, Jacob Zuma, President of the Republic of South Africa, in his closing statement CONGRATULATED all his colleagues for the historic Tripartite Summit which launched the Tripartite FTA negotiations which is a key milestone in the integration of Africa. He thanked them for their attendance and looked forward to the continuation of the rationalisation and deepening of the integration process in Africa.

19. The Tripartite Summit ADOPTED its Communiqué as read by Ambassador Dr. Richard Sezibera, Secretary General of EAC.

DONE at Johannesburg in the Republic of South Africa on 12 June 2011, in the English, French and Portuguese languages, all texts being equally authentic.