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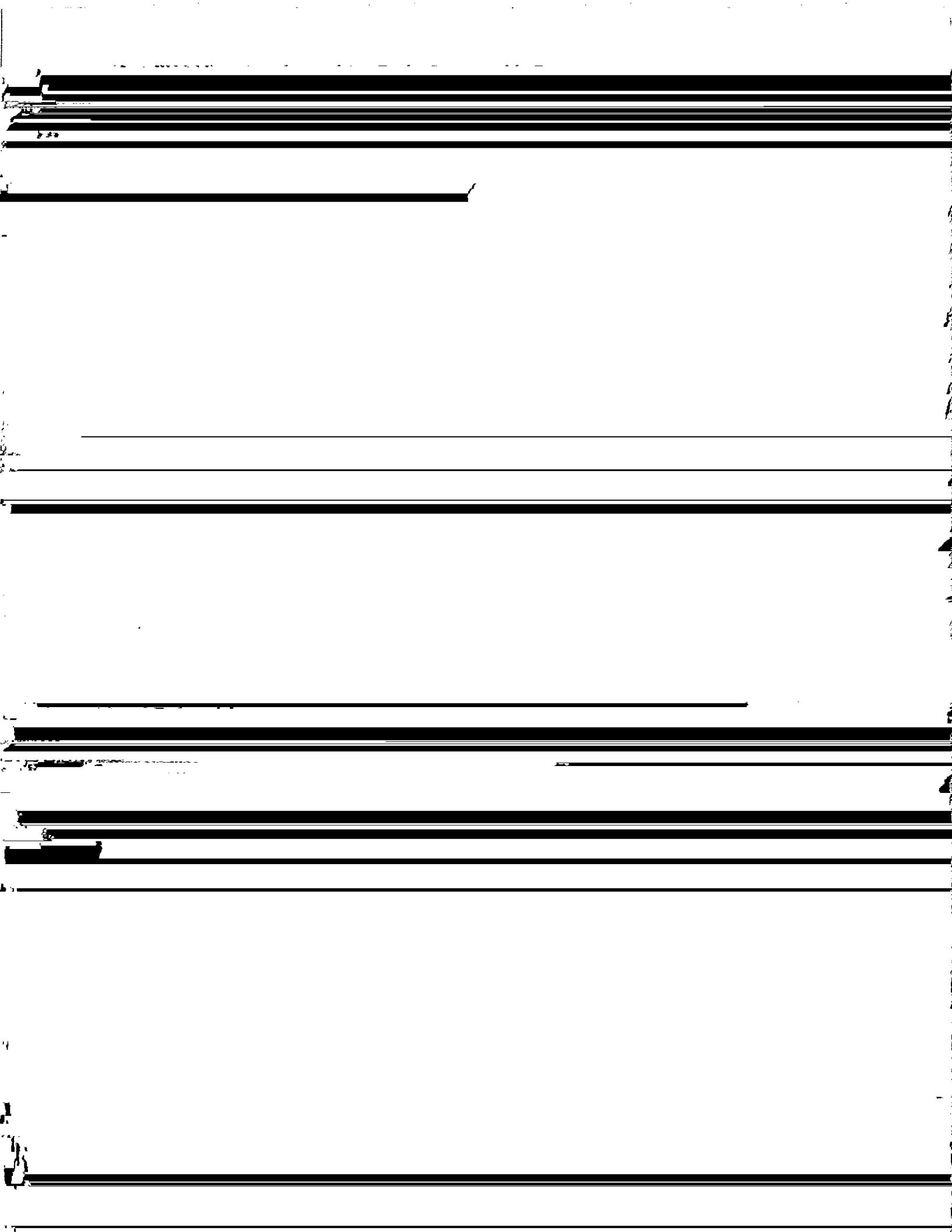
values and commitments, and the underlying... *Time to come to a... 1... 1... 1...*

Regional Differences

Government of Quebec (i.e. a formal and

the prairies are pressing for greater market access and further reduction of domestic subsidization by such trade competitors as the US and EU.

In other key examples, the Canadian Wheat Board still controls much of the marketing of wheat and barley for domestic consumption. The



must be added the growing numbers of private
and non-government organizations including

marketing and farm support programs. Less

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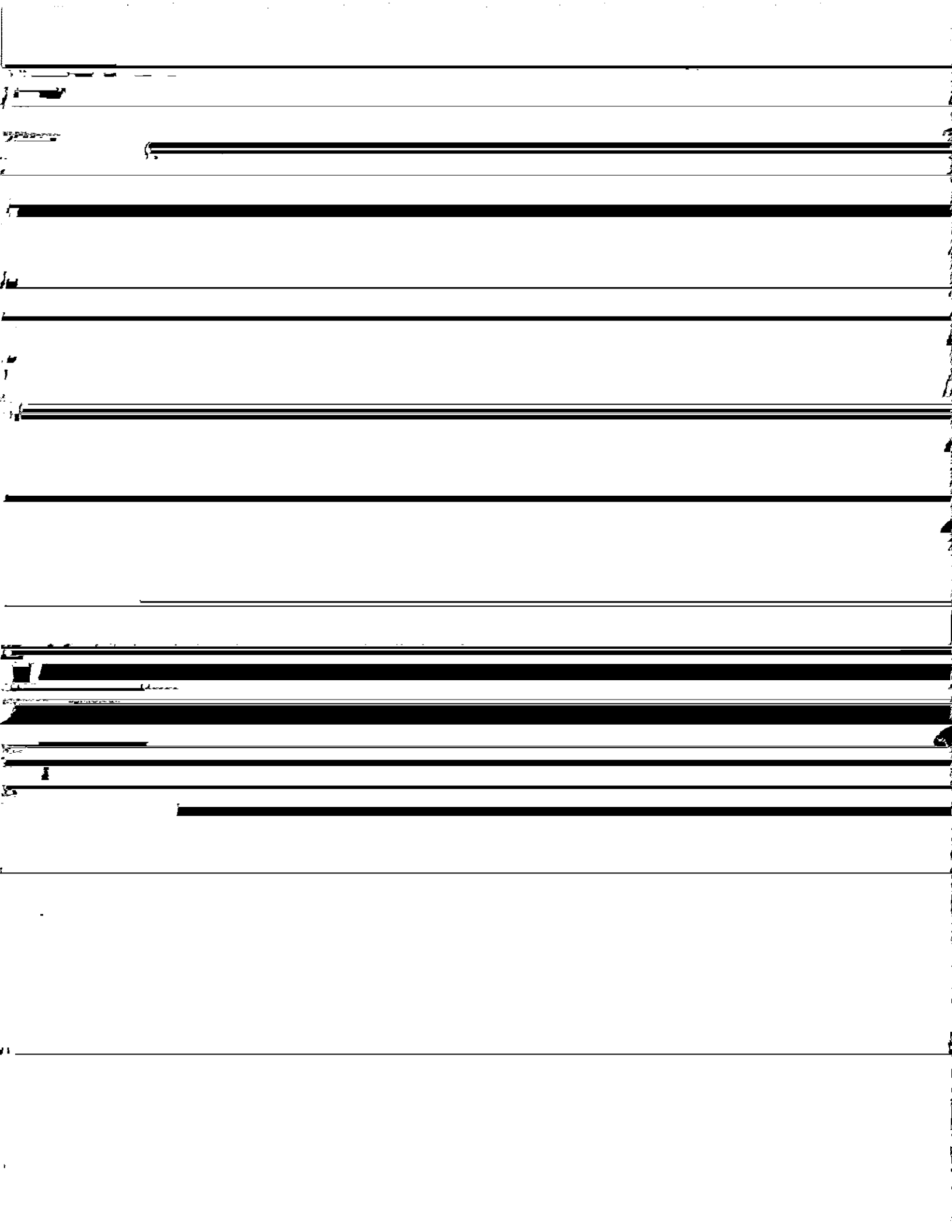
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of the European Union, and Japan. Russia continues to struggle to put its house in order and meet its own food requirements, and has limited influence on international policies or industry directions. China's role is much greater but it remains a lessor player in the Club as it strives for food security, and seeks to balance the influence of Japan and India by lending support to developing countries. Economic growth is

2015 international tensions and market uncertainties, driven by the destabilization of non-club member societies and the widening gap between have and have-not, have begun to erode the prosperity of the Canadian agri-food sector.

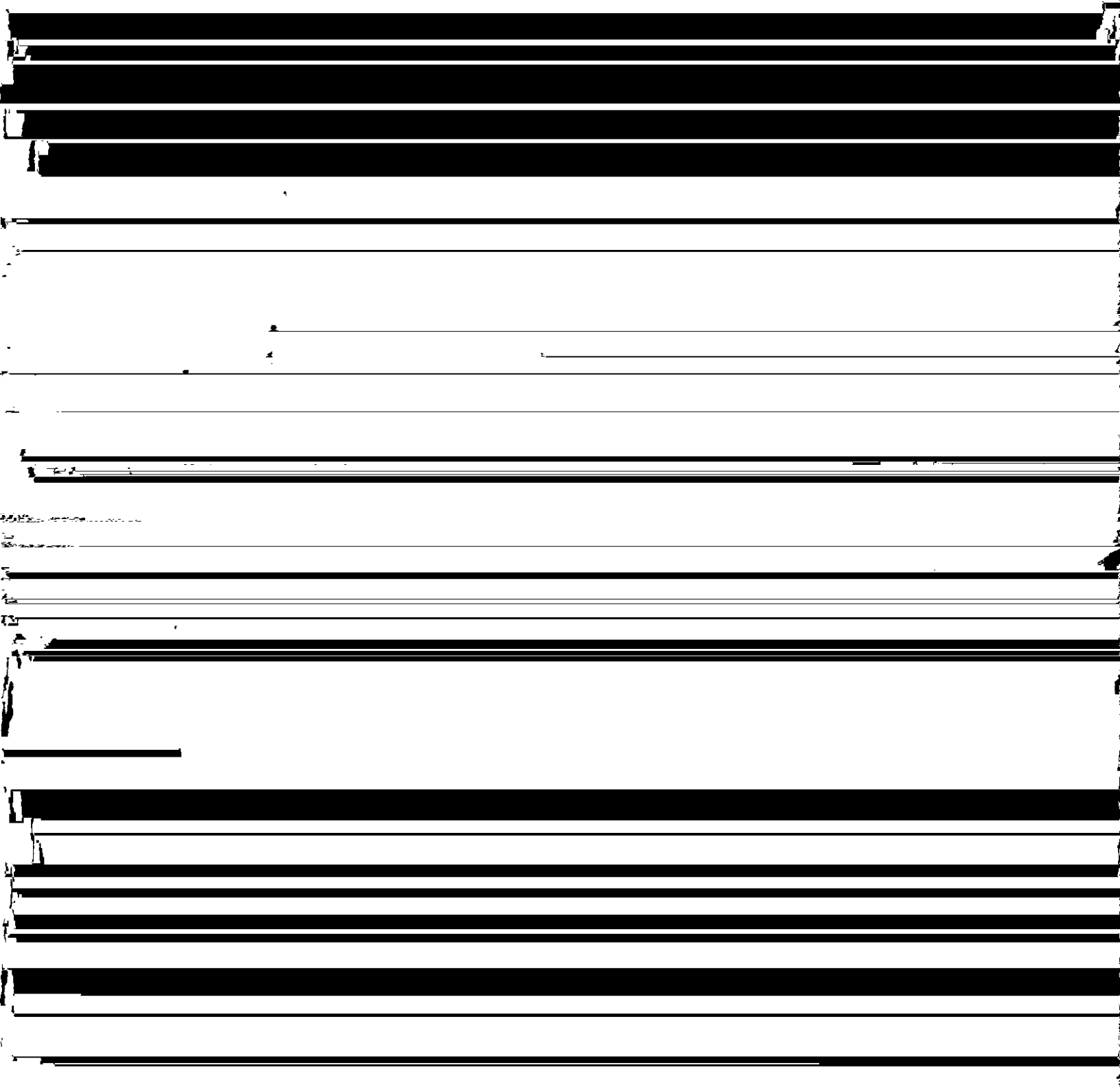
3.1.2 Evolution of the Scenario: Agriculture in Crisis



arrangement that continues to function as a consultative mechanism. Formal Pacific integration did not proceed but an APEC structure is in place for regional consultations. China plays a stronger role in the region,

in the Asian, Latin American and transitional economies. World crop prices slowly recover from the lows of the late 1990s, but the long term decline in real prices for agricultural commodities continues. Vegetable oils, livestock

transfers for rural areas. China plays a significant role in these collaboration mechanisms are sustained through



Canada's protected sectors and institutions. The

thrive; commodity producers, if they survive

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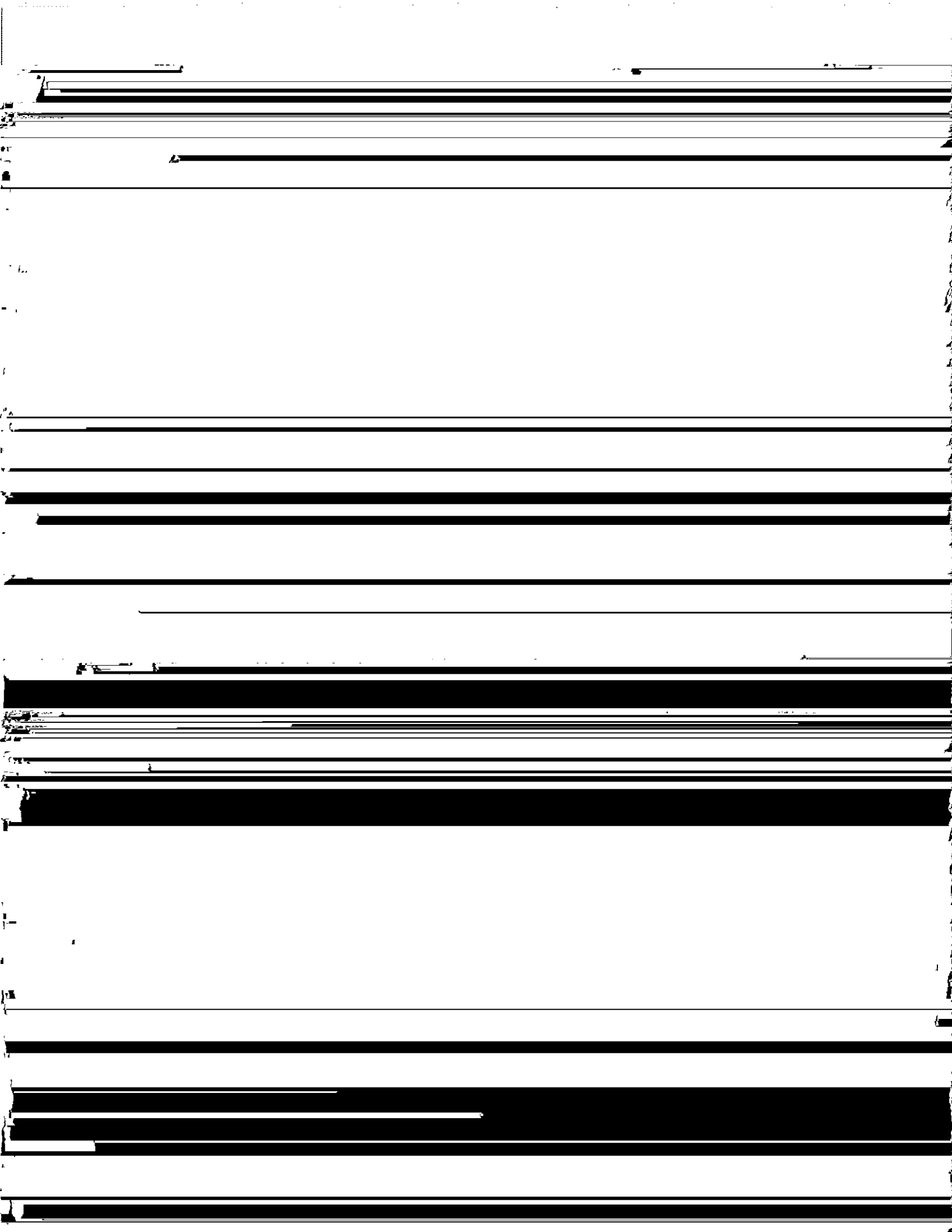
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... adjustment is necessary ... *Key Challenge*

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they are first at the post to invent, apply and benefit from the latest wave of technology.

Canadian agriculture is fully integrated into a buoyant, rapidly changing North American land-

Canadian agriculture is fully integrated on a North American basis and the policy distinctions between export and import sectors have largely disappeared. Supply management and the Canadian Wheat Board exist only in history

3.3.4 *Economic Growth and Power*

analogous to the regional market areas that

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By way of summary, the following points may now be made to distinguish this scenario from our current context – i.e., the base case described at the end of Part 2 above. For a more complete

- Regional tensions ease as conflicts over commodity interests fade.
- Governments struggle to keep up with rapidly evolving technological developments: locally-developed strategies become more

Agriculture in Russia languishes in this environment and Africa slides further behind in meeting its own food needs. Only those

neighbourhood –with the smallest room for international diplomacy of any period in the past century. The WTO collapse follows soon after

bloc commerce. There are no consistent regulations covering new issues such as the environment and biotech foods. The dominant

MNE influence, particularly in Washington. Agricultural support programs are gradually withdrawn which modestly helps Canada's

Global Context

- Under the “Regional Dominators” scenario,

agriculture in particular, there is no escaping the international policy context. Thus the first crucial governing challenge to be addressed and

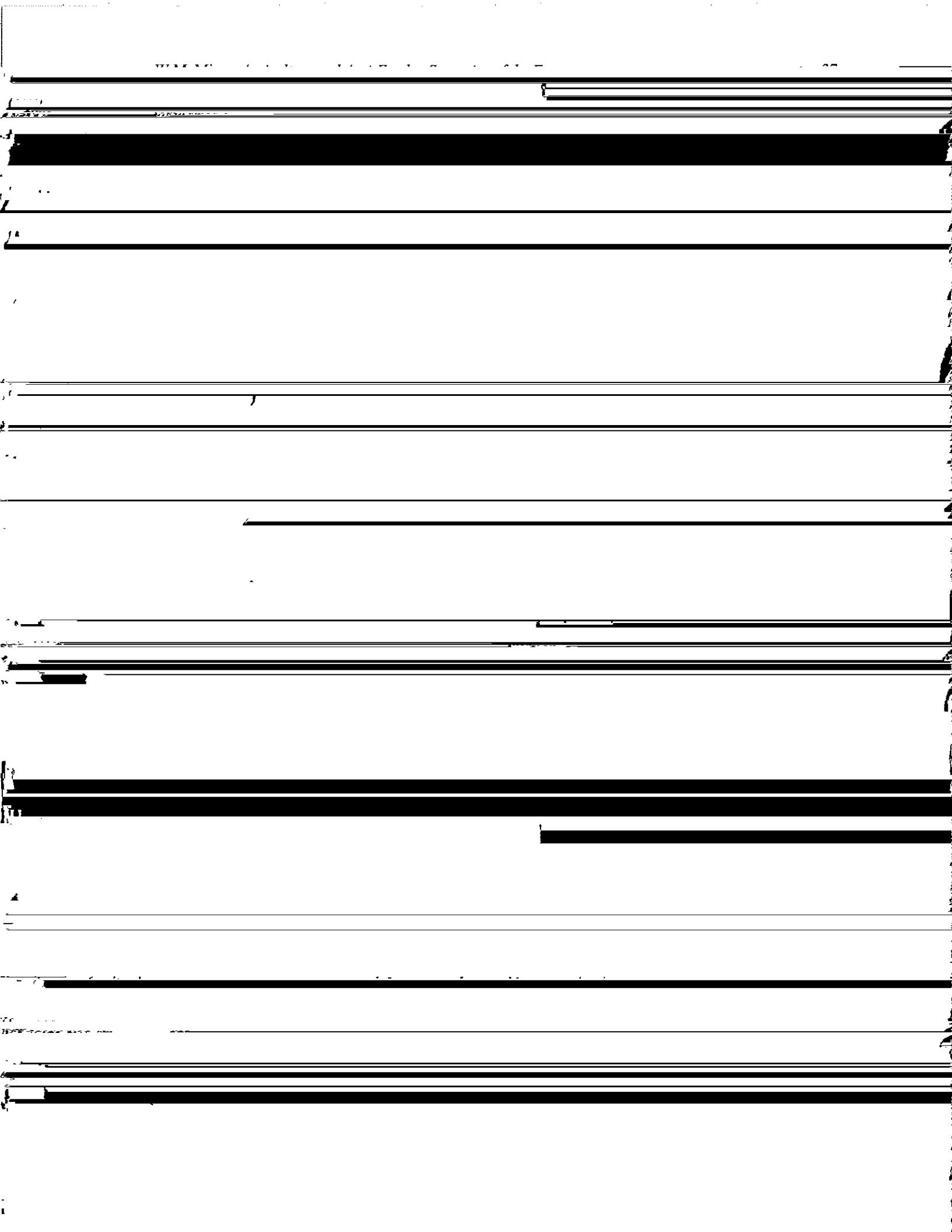
With respect to the newer regimes such as

protectionist fortress America under its own rules. Canada would have more leeway to lever concessions and to influence the general rules governing its bilateral trade under the Global Club and Shared Governance scenarios than in the other scenarios; it would be much more of a policy taker under the Regional Dominators.

This brings us to Canada's role in each of these scenarios. Canada's place in the WTO policy-making process differs considerably from the present day base case in three of the scenarios. In the Global Club, it becomes a more junior partner, allied still with the USA on most issues, but with less scope than in the base case,

portrayed in Regional Dominators, is a distinct

there will be less need for safety net intervention.



intergovernmental coordination, the federal government's diplomatic skills and management will be in demand at least as much as they are today. General political management of regional disparities would also return as a significant issue under this scenario, as the collapse of the

times with significant difficulty. It does have its advantages in providing each order of government with maximum flexibility to go its own way. Canada has thus avoided the complex and binding voting rules of the European Council of Ministers or the more formal and integrated

retain a Wheat Board presence. Farm interests (allied with anti-globalization parties and movements) would wage another difficult and protracted dispute over the phasing out of supply management for poultry and dairy products. Regional conflicts would be especially sharp on relative shares of federal transfer payments.

More so than in the base case, however

consistent regulations and international technical standards. Arm's length agencies and councils with mixed representation, including provincial and non-government involvement would administer most programs. These activities would be focused on administering financial transfers, applying technical and market regulations, and coordinating research, education and rural adjustment. Since global food issues would then

persist longer, but this is balanced by greater security in the US market and reduced EU/US farm subsidies.

The federal role is stronger under Shared Governance, in the sense that it has more clout internationally and is less of a policy-taker on international agriculture governance. Yet its policy-making function is also much more shared than in the base case, not only with civil society but also with the provinces. Thus it is a context of intensive multilevel governance. The larger

formal. Government involvement in the agricultural sector is limited to maintaining a legal and policy framework for rapidly evolving land-based activities. Governments have great difficulty just in keeping up with fast-moving developments, and thus can only afford intergovernmental relations that, with the rest of its governance, "lie low and move fast". Most of the international institutions discussed in the previous scenarios continue to exist but the rules and disciplines are perceived as guidelines, and usually ignored in favor of expediency. Domestic

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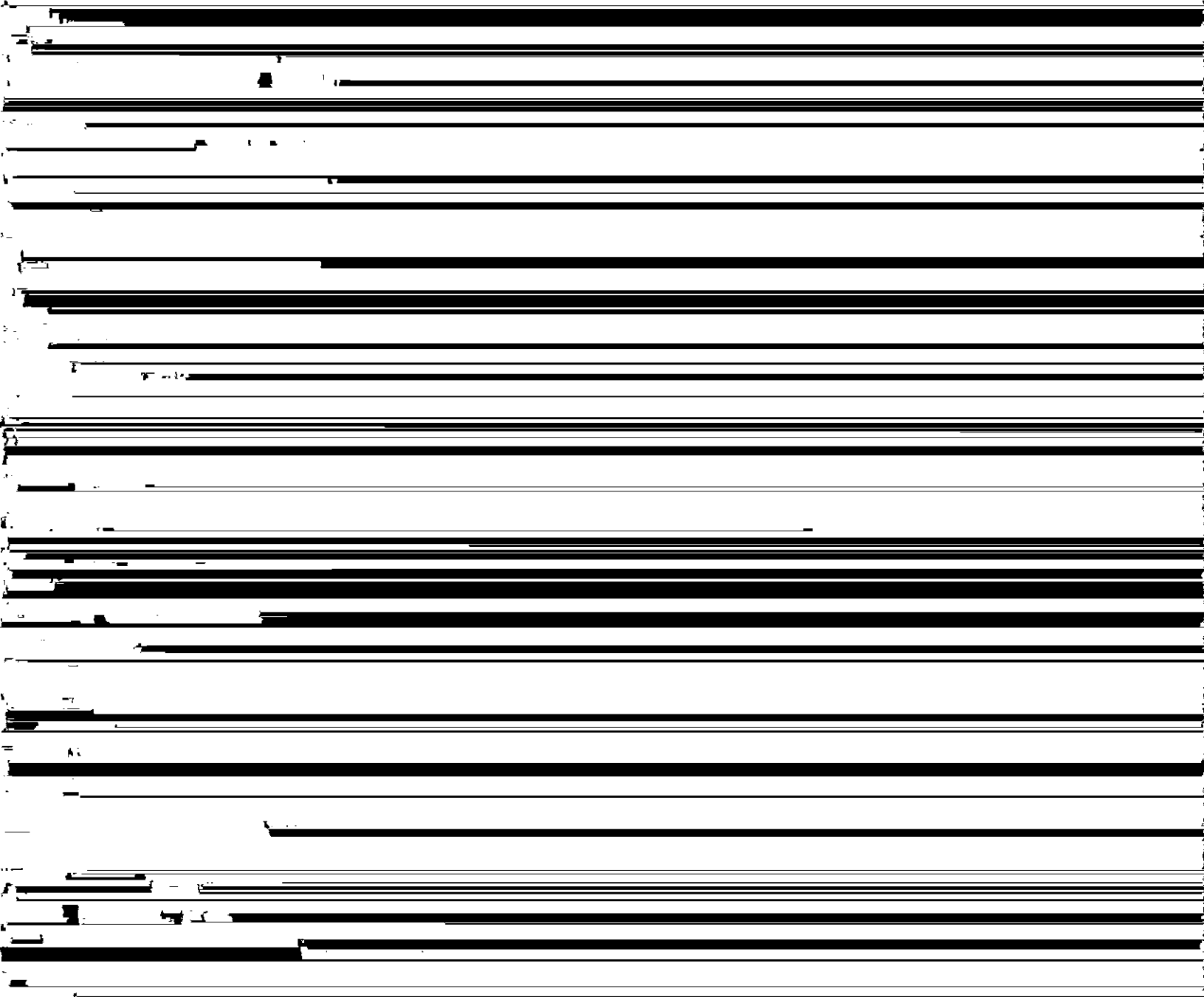
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