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**INTAL**

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**IDB**

Inter-American Development Bank







# Table of contents

## Analysis Column

200th edition of the INTAL Monthly Newsletter .....	7
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## Integration Blocs

### The Caribbean

Caribbean retables development agenda .....	11
---	----

### Central America

Regional anti-rust program seeks to contain worst effects of epidemic .....	12
Central American intraregional balance of trade .....	14
New Central American agreements and external negotiations .....	16

### Andean Community

CAN: breakthroughs in Andean Cross-Border Cooperation Strategy .....	19
New rules to facilitate CAN trade .....	21

### Mercosur

Developments in the MERCOSUR agenda trade .....	22
Brazil applies policies to enhance competitiveness .....	24

## Regional And Global Overview

Fifth BRICS Summit, and currency swap between Brazil and China .....	31
Integration scenarios in the Pacific .....	32
COSIPLAN's progress in facilitating and modernizing border crossings in South America .....	34

## Other IDB Activities

IDB loan to help improve iron ore transportation services in Paraguay-Paraná Waterway .....	37
Four energy companies, the AFD, and the IDB agree to explore electricity interconnection of Northern Arc countries .....	38

## INTAL Documentation Center

### Reviews

Como mejorar la competitividad de las pymes en la Unión Europea y América Latina y el Caribe: Propuestas de política del sector privado. ECLAC. January 2013. 38 pages. ....	41
--	----

### Bibliographic alert

.....	43
-------	----

## Monthly Highlights



* Powell, A., coord. (2013). Replantear las Reformas : Cómo América Latina y el Caribe pueden escapar del menor crecimiento mundial = Rethinking reforms : How Latin America and the Caribbean can escape suppressed world growth. Washington: BID. ....	44
* Ruchansky, B., coord. (2013). Integración eléctrica en América Latina: antecedentes, realidades y caminos por recorrer. Santiago de Chile: CEPAL. ....	46
* Competitive Advantage : Moving Ahead of the Global Competition : Private Sector Priorities for Trade Facilitation in the CAFTA-DR Region. (2013). Washington: BID. ....	50
* Os BRICS na OMC : Políticas Comerciais Comparadas de Brasil, Rússia, Índia e África do Sul. (2013). Brasília: IPEA. ....	51

## Editorial Staff

.....	55
-------	----



# Analysis Column







## 200th edition of the INTAL Monthly Newsletter


“The publication of this Monthly Newsletter starts a new phase into the activities of INTAL supporting the development of the integration processes in Latin America and the Caribbean...” That was the opening of Issue 1 of the *INTAL Monthly Newsletter* in August 1996. The material was sent out by subscription, and comprised the Journal, *Integration & Trade*, and the Newsletter itself, which aimed to “providing its subscribers with specialized articles in the fields of integration and trade as well as current information on the most relevant events pertaining to those fields...” The contents to that first edition bore various titles: “MERCOSUR Association Agreements with Chile and Bolivia”, “Creation of Free Trade Area in South America”, “Multilateral Agreement on Air Services in CARICOM”, “Progress in Mexico’s Negotiation with Northern Triangle toward Free Trade Agreement”, and so on. They reflected the latest developments of the day, and many – with subtly different emphases - still hold true today. ([See attachment for the complete first edition](#)).

With the advantage of hindsight, it is interesting to compare Issue 1 of the Newsletter with the latest edition. In terms of content, their goals remain the same. The aim has been to keep the radar alert to developments in integration and trade across the length and breadth of the region. The Newsletter has also been a medium for circulating IDB activities related to these issues and channeled in numerous ways, including technical cooperation, and a wide array of projects and studies. The publication has kept its subregional grouping, which corresponds to the traditional integration blocs of Latin America and the Caribbean. As we know, the reality of events and the strategies driven by the countries have been considerably more dynamic. There have been numerous initiatives to strengthen commercial ties and cooperation between the different blocs (CAN and MERCOSUR are good examples), as well as a rapid increase in extraregional agreements either at the level of individual countries or through plurilateral agreements – the Central American and Caribbean agreements with the European Union being indicative of this modality. We have even seen the creation of new blocs, such as UNASUR.

This unfolding picture of integration processes and their various alternatives has demanded the close observation of national strategies in order to keep readers well-informed and up-to-date. Ever mindful to include these realities and the growing internationalization of Latin America and the Caribbean, as well as the general dynamism of the global economy in constant interaction with the region, the Newsletter has added a section on Regional and Global Outlook.

For all that these remarks show how the publication has accompanied the integration process, and Latin American and Caribbean international insertion over the years, the underlying principle of the *INTAL Monthly Newsletter* remains unchanged: to provide readers interested in these issues with relevant and manageable information that covers the entire geography of the region. The publication thus has a disseminating role, which is inherent to the Bank’s institutional mandates as listed in the current Integration Strategy.[1]

The other dimension in a comparison of the newly launched Newsletter and the publication today is presentation. Attention to editorial detail has been a constant, but there are significant differences in the way the Newsletter has been circulated. Those were the days of ink and glossy paper; today, the material is distributed digitally. In January 2000, Issue 42 of the Newsletter was published in



pdf and there have been a series of adaptations since then to make the publication easier for readers to access, ultimately arriving at the online platform of the present. The new tool was adopted in parallel with improvements in two areas closely related to the publication: on the one hand, the [INTAL Documentation Center](#) modernized and expanded its catalogue, while also providing online access; on the other hand, [Legal Instruments of Integration](#), which presents the legal norms that form the basis of integration and trade agreements, allows readers to consult the texts remotely, and with an organization accessible to specialist and non-specialist readers alike. The Bank's activities in this specific field are also described in our Integration and Trade Sector [Newsletter of Integration](#).

Apart from greater versatility and speed, the digital world has enabled us to surmount a crucial barrier for a publication that aims to reach out to readers inside and outside of the region. Subscription is now a thing of the past. Today, the Newsletter reaches 22,000 users every month and, so far in 2013, the publication has received on average 1,000 hits a month. This figure allows us to gauge just how much interest there is out there in the content of the Newsletter. In short, the comparison of this, our 200th issue, and the very 1st issue of the Newsletter sends out a clear signal: the continuity of our initial purpose and of our service to our readers, hand in hand with continuous efforts to enhance both the content and the form of the publication. It is our intention to carry on down this road.

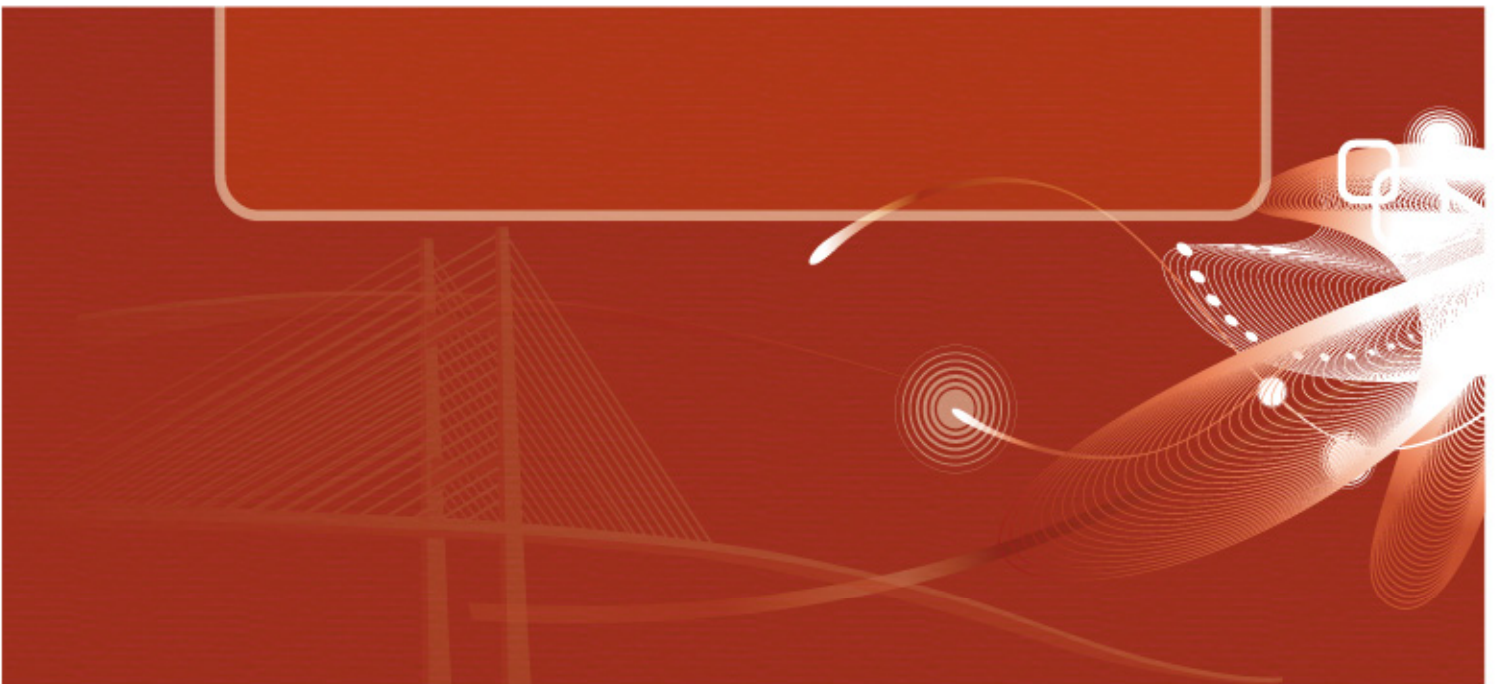
MONTHLY NEWSLETTER Editorial Committee  
April 2013

[1] IDB. 2011. [Integración competitiva regional y global: Estrategia sectorial](#). March





# Integration Blocs









## The Caribbean

### Caribbean retables development agenda

The Caribbean Forum was held in Bogota, March 5-6, ahead of the “[Conference on Sustainable Development in Latin America and the Caribbean: Follow-up to the development agenda beyond 2015 and Rio+20](#)”, held with the support of the Colombian Government and the Economic Commission for Latin America and the Caribbean (ECLAC).

Convened by ECLAC subregional headquarters for the Caribbean, in collaboration with the United Nations Development Group (UNDG)-Latin America and the Caribbean (LAC), and the Secretariat of the Caribbean Community and Common Market (CARICOM), the Forum focused on development goals, and regional and global governance.

To examine the challenges faced by small island developing states (SIDS) in the Caribbean and contribute significantly to the outline of a post-2015 development program, an agenda was proposed, which is set out in the paper, “[Caribbean Forum: Shaping a Sustainable Development Agenda to Address the Caribbean Reality in the Twenty-First Century](#)”. The paper’s conclusions suggest the subregion will work on a) eradicating poverty, with special attention to vulnerable groups; b) intergenerational poverty and the sustainability of breakthroughs in reducing it; c) sustained, inclusive, and equitable growth that benefits all citizens; d) people-focused development; e) applicable regional and global agendas; f) a comprehensive development agenda; g) recognition of the vulnerabilities of SIDS; h) improved, inclusive governance; i) and the finite nature of the subregion’s natural resources.

For more information, click on the following links: [\[1\]](#); [\[2\]](#); [\[3\]](#).



## Central America

### Regional anti-rust program seeks to contain worst effects of epidemic


The Central American region has been hit by what has been called the worst attack of stem rust in history. This fungus, which attacks coffee trees, has damaged 53% of plantations on the Isthmus and, according to the [International Coffee Organization \(ICO\)](#), losses are estimated at 2.3 million bags (equivalent to US\$550 million) and around 400 thousand jobs (almost half in Guatemala and Honduras), as well as indirect social and economic impacts for the region. The impact on the 2013-2014 coffee crop is expected to be even worse.

Several Central American countries have declared a phytosanitary emergency, including Costa Rica, Guatemala, and Honduras, the region's main coffee grower and the sixth largest at global level. Operating alongside these national strategies is the "[Integrated Program to Combat Coffee Rust and Recover Productive Capacity in Central America](#)," adopted at the end of March by the Central American Agricultural Council (CAC). As mentioned in [INTAL Monthly Newsletter No. 199](#), the goal is to deal with the problem comprehensively and mitigate the negative impacts of rust for across the Isthmus.

The program consists of [four components](#):

1. Integrated rust management: a phytosanitary campaign and [communication plan](#) seeking to educate farmers about the rust outbreak and how to manage the fungus.
2. Genetic improvement: carrying out studies to establish the causes of the fungus's resurgence, and alternative, more disease-resistant varieties.
3. Care for vulnerable population: diagnosing the social impact and defining compensation and mitigation measures.
4. Development of institutional capacities to combat rust and recover productive capacity: a regional training program and the holding of First International Coffee Rust Summit.





Documents on rust will also be collected to set up a portal and there will be a technical report, whose findings and recommendations will be made known in December.

The parameters for the rational use of fungicides will also be standardized and there will be a guide to good practice in integrated rust management adapted to regional coffee cultivation conditions.

Last, an early warning system is to be devised by October, including the agricultural perspective and social aspects (employment and food security), with the support of regional and international organizations such as the Inter-American Development Bank, which also collaborated in the drawing up the regional plan.

The implementation of the plan at regional level is estimated to require around US\$1.3 million.

More information at the following links: [\[1\]](#); [\[2\]](#); [\[3\]](#).

# Central American intraregional balance of trade

In March, the Secretariat for Central American Integration (SIECA) presented a new update of the document on the [State of Central American Integration](#).

As well as covering the legal framework for integration, this document analyzes the region's trade flows and the evolution of its economies.

The analysis points out that intraregional exchange between 2005 and 2011 increased by an annual average of around 10% (in spite of the almost 20% fall seen in 2009). Only unroasted coffee and sugar cane, it should be remembered, are outside of free trade, although there are bilateral restrictions for other products, such as roasted coffee, ethyl alcohol, petroleum products, and distilled spirits. The document also goes into Central American trade regulations (rules of origin, safeguards, unfair practices, etc.), the dispute settlement mechanism, tariff policy, and other similar issues.

Regarding the Central America Customs Union, the study reviews the legal framework and highlights the inclusion in the Central American Tariff System of the results of the Fifth Amendment to the nomenclature of the Harmonized Commodity Description and Coding System (HS) in January 2012, with 95.7% of positions currently harmonized.

The six-monthly Action Plan drawn up by the Pro Tempore Presidency of Costa Rica for January-June, 2013, consists of three rounds of talks: [the first held February 4-8](#); the second, April 15-19, and the last tabled for June 17-21. The main topics included in the Plan are the implementation of the regional commitments of the Association Agreement with the European Union (EU), Panama's membership of SIECA, trade facilitation, market access, technical regulations, attention to trade disputes, and customs procedures.

Panama's membership is undergoing approval by the country's Legislative Assembly, after ratification by the Cabinet. When Panama completes the legal procedures for membership, the Central American countries and Panama will begin to implement the commitments set out in the Membership Protocol and Central American agreements.


Last, the study analyzes Central America's insertion in the international economy, based on the commitments made in the framework of the World Trade Organization (WTO) in terms of market access and any international trade agreements currently in force.

This month, the Secretariat also introduced the [Bulletin of Central American Foreign Trade January-December of 2012](#), which shows the trade statistics at the close of 2012.

The Isthmus's total external sales were 7.0% up on 2011, a slowdown compared to the previous year, when they had grown 11.1%. The major items for export were coffee, tea, and spices (12.8%); electrical machines, appliances, and equipment (10.3%), and fruit (10.1%). In terms of destinations, United States continues to be the main partner, accounting for a third of shipments, followed by the region itself (25.2%), and the EU in third (14.7%).

Imports rose by 5.9% (9.6% in 2011), driven by fuels (which accounted for a fifth of the total) and electrical machines, appliances, and equipment, and parts thereof (11.5%). 40.9% of purchases came from United States, 12.8% from Central America, and 8.0% from Mexico.





The trade balance went into deficit in 2012, 5% down on the previous year. The countries with most weight in intraregional imports are El Salvador and Honduras, followed by Guatemala, while those that export most to the rest of the bloc are Guatemala and El Salvador, and Costa Rica in third. The main products in intrazone trade are food preparations, plastics, paper and cardboard, and iron and steel.

#### Related articles

- IDB-INTAL. “[SICA’s twin pillars: democratic security and institutional strengthening](#)”, *INTAL Monthly Newsletter No. 198*, February 2013.
- IDB-INTAL. “[Trade Facilitation in Central America: harmonization of technical regulations and analysis of logistical barriers to trade](#)”, *INTAL Monthly Newsletter No. 199*, March 2013.



## New Central American agreements and external negotiations

The Central American countries have an active trade negotiation agenda. Recent advances include the entry into force of the Free Trade Agreement (FTA) between Canada and Panama, the talks toward the broadening of existing agreements between the Northern Triangle and Colombia, and Panama and Cuba, and the launch of negotiations between El Salvador and Belize.

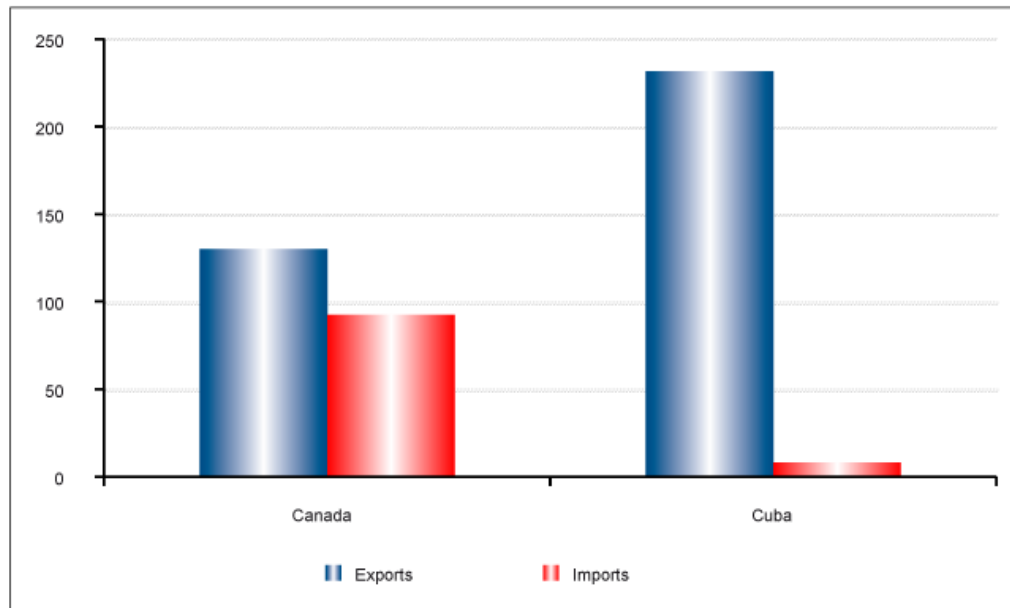
The FTA between [Panama and Canada](#) signed in 2010 entered into force, April 1, enabling tariff-free admission to the Canadian market for 97.2% of Panamanian products, and Panama immediately eliminated tariffs on 73.3% of goods originating in Canada. As part of its strategy to deepen ties with Latin America and the Caribbean, Canada has agreements with several countries in the region – Mexico (NAFTA), Costa Rica, Chile, Colombia, and Peru – and has concluded negotiations with Honduras.

In 2011, Panama had a trade surplus of US\$37.6 million with Canada, after exports of US\$130.1 million and imports of US\$86.3 million (Graph 1). Panamanian shipments to Canada are highly concentrated, with precious metals (gold) accounting for 97.9%; imports of Canadian products are far more diversified, primarily meat and preparations thereof, and mechanical and electrical machines and equipment, which together form 39.7% of the total.

There was also a first round of negotiations between [Panama and Cuba](#) toward the broadening of the bilateral partial scope agreement. The talks focused on market access, dispute settlement, maritime cooperation, and investment. Panama's exports to Cuba are higher than its shipments to Canada, totaling US\$231.6 million in 2011 (primarily machinery and textiles), while imports from the same source totaled just US\$8.1 million, resulting in a large surplus for Panama (Graph 1).

### Graph 1: Panama's trade with Canada and Cuba

In millions of US\$, 2011 data.



Source: Comtrade

[El Salvador, Guatemala, and Colombia](#) met to deepen the agreement between the Northern Triangle (which also includes Honduras) and the South American country, particularly in the talks on market access, customs mutual assistance, and rules of origin. The FTA in question was signed in 2007 and came into force in Guatemala in 2009 and the following year in El Salvador and Honduras.

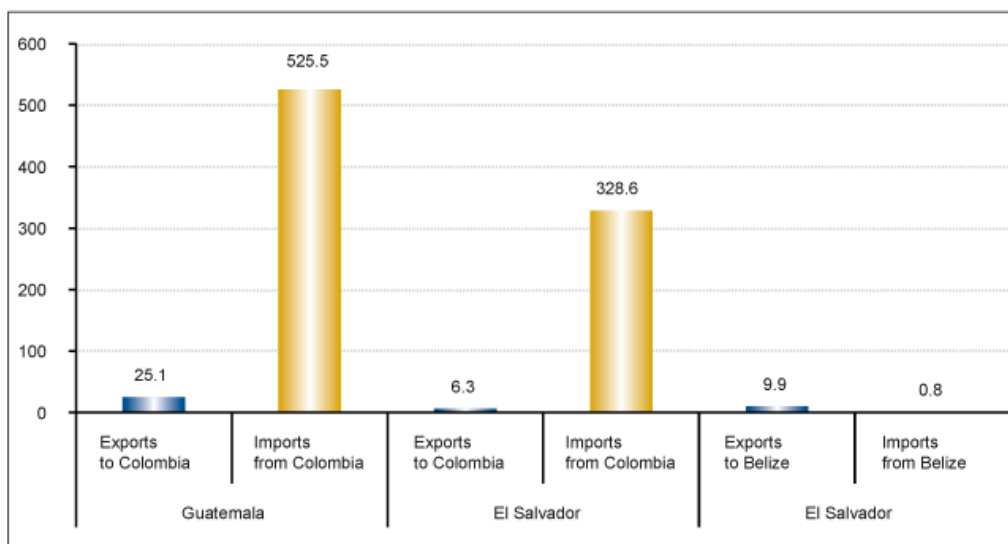
Also, [El Salvador and Belize](#) began negotiations toward a partial scope agreement that will strengthen trade relations and cooperation between the two countries. There was progress in market access, sanitary and phytosanitary measures, trade defense, dispute settlement, institutional arrangements, technical barriers to trade, and rules of origin. The second round of talks is to be held in July. According to El Salvador's Economy Ministry, the main opportunities for the country are in minerals, paper and cardboard, agricultural products, chemicals, and the metalworking industry.

Belize has several agreements with Latin American countries, such as Colombia, Costa Rica, Dominican Republic, and Venezuela, in the framework of its participation in the Caribbean Community and Common Market (CARICOM).



Graph 2: Guatemala and El Salvador's trade with Colombia; El Salvador's trade with Belize

In millions of US\$, data from 2012 (not including maquilas).



Source: SIECA.

As can be seen from Graph 2, both Guatemala and El Salvador have a trade deficit with Colombia, and it is striking how little these two Central American countries export to the Colombian market. Where trade with Belize is concerned, El Salvador has a surplus, although again the amounts involved are extremely low.

#### Related articles

- IDB-INTAL. [“Central America: new FTAs come into force”](#), *INTAL Monthly Newsletter No. 197*, January 2013.
- IDB-INTAL. [“Colombia and Peru in 2012: Progress in external trade agenda”](#), *INTAL Monthly Newsletter No. 197*, January 2013.
- IDB-INTAL. [“EFTA and Canada form focus of Central American trade negotiations”](#), *INTAL Monthly Newsletter No. 193*, September 2012.
- IDB-INTAL. [“Central America-Canada negotiations”](#), *INTAL Monthly Newsletter No. 191*, July 2012.



## Andean Community

### CAN: breakthroughs in Andean Cross-Border Cooperation Strategy



Representatives from the Foreign Ministries of Bolivia, Colombia, Ecuador, and Peru, and CAN officials met in Tulcán, Ecuador, April 10-11, to work on a draft Proposal for the Andean Cross-Border Cooperation Strategy, which should be finalized by the end of 2013. The Strategy Proposal seeks to promote the border development of the CAN countries and to improve quality of life for the inhabitants of [Border Integration Zones \(BIZs\)](#). [1] The project is highly relevant to CAN, given that 10% of its total population is located in Border Integration Zones, and that 32% of intra-European Union (EU) trade is overland.

The meeting is part of the CAN-EU program, “Support for Economic and Social Cohesion in the Andean Community of Nations,” and seeks to utilize the European experience as a benchmark in overcoming obstacles to cross-border cooperation.

Other border development projects will also be carried out within the program. These include:

1. The “Lake Titicaca Lakeshore Development” project on the Bolivia-Peru border, which seeks the rational use of lakewater resources.
2. The “Intercultural Education in Culturally and Linguistically Diverse Contexts” project in Peru-Ecuador border communities.
3. The “Improvement of Sanitary and Environmental conditions on the Binational Border” project for the provision of sewage treatment and environmental sanitation infrastructure on the Colombia-Ecuador border.
4. The “Practical Models of Fish Production for Human Consumption and Ornamental Use for the Development of the Border Integration Zone” project on the Colombia-Peru border for the conservation of natural resources.

For more information, click [here](#).



[1] These can be defined as “adjacent territorial border areas of Andean Community member countries regulated by [Decision 501](#), where it is sought to implement plans, programs, and projects to promote development jointly, equally, and in coordination.”





## New rules to facilitate CAN trade

As part of the 110th Ordinary Meeting of CAN Foreign Trade Ministers, March 11, seven community rules were approved that seek to facilitate and stimulate trade, as well as to protect the agricultural health of the bloc's countries. They include Decision 779, which declares a subregional phytosanitary alert due to Huanglongbing citrus disease (a.k.a. "citrus greening disease"), and instructs the General Secretariat and the Andean Agricultural Health Technical Committee to develop a Community Contingency Plan to reduce the risk of this disease. Other rules aim at reassessing of chemical pesticides for agricultural use, and the distribution of cosmetics and hygiene products.

For more information, click [here](#).


## Developments in the MERCOSUR agenda trade

The last month saw several relevant events in the MERCOSUR countries' agenda.

First, **Brazil and Uruguay** signed the [Seventy-First Additional Protocol to Economic Complementation Agreement \(ECA\) No. 2](#) to create the **Bilateral Trade Commission (CCB)** to resolve specific legal, regulatory, and operational difficulties relating to market access, trade defense measures, and sanitary and phytosanitary measures, while also establishing consultation procedures in origin and expedited customs clearance.

Second, the Commissions on Economic Affairs and External Relations of the Brazilian senate [approved](#) a bill allowing the country's Central Bank to open a US\$40 million/month line of credit with the Central Bank of Uruguay to finance **bilateral trade in local currencies**. Over the last few years, the relevance of schemes to promote exchange without using other currencies has grown. Brazil, for example, has a similar scheme with Argentina – the Local Currency Payment System (SML) – with a credit line of US\$120 million/month, and Uruguay has recently put in a formal request to join the Single System for Regional Compensation ([SUCRE](#)), currently available for transactions[1] between commercial Bolivia, Cuba, Ecuador, and Venezuela.

Third, it should be noted that **Venezuela's** National Integrated Service for the Administration of Customs Duties and Taxes (SENIAT) [adopted](#) the **MERCOSUR Common Nomenclature (NCM)**, as part of the commitments made by the country when it joined the bloc.



## Related articles

- IDB-INTAL. “[Venezuela, a MERCOSUR member](#)”, *INTAL Monthly Newsletter No. 192*, August 2012.
- IDB-INTAL. “[The Local Currency Payment System in MERCOSUR](#)”, *INTAL Monthly Newsletter No. 175*, March 2011.
- IDB-INTAL. “[Latin America explores alternatives to boost trade in local currencies](#)”, *INTAL Monthly Newsletter No. 153*, April 2009.

[1] See IDB-INTAL. “[The Local Currency Payment System in MERCOSUR](#)”, *INTAL Monthly Newsletter No. 175*, March 2011, and IDB-INTAL. “[Latin America explores alternatives to boost trade in local currencies](#)”, *INTAL Monthly Newsletter No. 153*, April 2009.





# Brazil applies policies to enhance competitiveness

Brazil continues to make progress in the implementation of policies aimed at increasing the competitiveness of its economy, particularly in manufacturing and related activities. On the one hand, it has adopted new Export Processing Zones (EPZs) while, on the other hand, announcing a [plan](#) to promote nineteen strategic sectors under the [“Bigger Brazil” Plan](#).

## Export Processing Zones


In 2007, Brazil gave fresh impetus to the special customs regime of EPZs[1] set up in 1988 in an international and local context that was markedly different[2] to that of the time. From 2006 on, the appreciation of the real and the subsequent loss of competitiveness of the industrial sector, aggravated by competition from the Asian countries, had a major impact on sales of Brazilian manufacturing.[3] It was accordingly proposed to update the EPZ law in the framework of a broader policy to deal with the crisis in Brazil's industrial sector.

This tool is aimed at increasing exports by reducing the high cost for companies of settling in Brazil, minimizing bureaucracy, and overcoming difficult access to financing and problems of logistics.[4]

EPZs are free trade areas where overseas companies that set up in business to produce goods for export also enjoy certain tax, administrative, and exchange incentives. The period of validity for all incentives is 20 years, extendable to a further 20. The law allows exports to the domestic market of 20% of total annual external sales, subject to payment of all taxes and contributions normally included on an imported product. It also provides for the protection of manufacturing companies operating in the general customs territory (TAG) from competition by goods produced in EPZs. In the event of the sale to the domestic market of a product in an industrialized area having a negative impact on domestic industry, the National Council for Export Processing Zones (CNZPE) may decrease the percentage permitted for export to the TAG, or even prohibit it outright. Furthermore, the straightforward switch of industrial plants from the TAG to the EPZs is not allowed.

The creation of EPZs is based on proposals from States or Municipalities, which are then analyzed by the CNEPZ and submitted to the President's Office for approval. The CNEPZ operates within Brazil's Ministry of Development, Industry, and Foreign Trade (MDIC), which holds the presidency of the Council, which also comprises a further four ministries. The CNEPZ is responsible for tracing the direction of national policy for special areas, and for analyzing and approving any industrial projects interested in settling in the EPZs.

According to the [MDIC](#), there are now 24 EPZs in Brazil at the preoperational stage, but [just two are endorsed by the Brazilian executive](#) (in Acre and Pecem). In March, the commencement of operations in the EPZ of Pecem was authorized, and two industrial projects were approved. On the one hand, the Companhia Siderúrgica do Pecem (CSP) will make an investment of US\$8 billion, which should become operational by 2015, producing steel plates, and employing approximately 4,000 people directly and 10 thousand indirectly. Vale Pecem, on the other hand, will invest US\$98 million to supply CSP with iron ore. This EPZ reflects one of the main objectives of the



scheme, namely, to add value to the export of primary commodities. Also, in early April, [the CNZPE approved the proposal for the creation of a new EPZ in Rondônia](#), specifically in the municipality of Porto Velho, by the facilities of the industrial and logistics complex of the new Rio Madeira river port. The next step is to submit it to the executive for approval. In this case, the potential projects are related to adding value to ongoing exports in meat and soy.

Some of the question marks over the implementation of EPZs stem from their compatibility with commitments made before the World Trade Organization (WTO). Although such agreements make no explicit reference to EPZs, or more broadly to duty free zones, the Agreement on Subsidies and Countervailing Measures (ASCM) regulates the application of any subsidies because of their potential distorting effect on trade. The ASCM define as *specific subsidies* those that represent a financial contribution, are granted by a government or any public body, and confer a benefit. Also, the contribution must be granted to a specific recipient (e.g. a company, sector, region, or product). *Prohibited subsidies* are those related to export performance or requiring local content; the rest are classified as *actionable*, i.e. in the event of a member's interests being affected by their application, they can seek a consultation. However, the ASCM excludes from the definition of a subsidy certain tax incentives that coincide with those granted in EPZs. Gari (2011) argues that the Brazilian EPZ law grants incentives that can be classified as subsidies under the ASCM definition. These incentives are, furthermore, contingent upon export performance and so prohibited by the WTO.

### Sectoral Strategic Agendas

As part of the “Bigger Brazil Plan”, which seeks to stimulate the competitiveness of the Brazilian economy, the Sectoral Strategic Agendas were recently unveiled. These aim to boost local suppliers' shares in value chains, and stimulate innovation, research, cooperation, and technological development, while strengthening productive capacity, increasing exports, expand and attract investment, developing intangible assets related to innovation and design, adding value in mining activities, improving infrastructure and logistics, and so on.

The strategic sectors covered by the agendas are the following:

1. Oil, gas, and shipping
2. Health complex
3. Automotive
4. Defense, aeronautics, and space
5. Capital goods
6. Information and communications technology/Electronics complex
7. Chemicals
8. Renewable energy
9. Mining
10. Metallurgy
11. Paper and cellulose
12. Personal hygiene, perfumes, and cosmetics
13. Leather, footwear, textiles, garments, gems, and jewelry
14. Furniture

15. Civil construction
16. Agroindustry
17. Trade
18. Services
19. Logistics services

Key measures include tax benefits, sectoral financing, promoting worker and supplier qualification, stimulus for the certification of local products, higher standards in government procurement, regulating logistics, and the development of “brand Brazil.” It should be stressed that the Strategic Sectoral Agendas provide for the use of various trade-related instruments, such as “draw back,”[5] the development of a certification system for domestic content, stepping up technical requirements, more preferences for domestic suppliers in government procurement in certain sectors, the refinement of lines of financing for export, provisions in customs valuation, various trade promotion mechanisms, the extension of antidumping duties and quotas, tariff elimination, and so on.

At the regional level, the Plan seeks to promote productive integration in the wine sector in MERCOSUR, while strengthening the automotive sector within the bloc. In this last sector, provisions are being made to revise the managed trade regime with Argentina and rules of origin in the middle of this year.

### Related articles

- IDB-INTAL. “[Trade and stimulus measures for motor vehicles, computer equipment, and tourism](#)”, *INTAL Monthly Newsletter No. 194*, October 2012.


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[1] On the subject of ZPEs, see Ramos, Gayá, Campos, et al., 2012.

[2] Decree Law No. 2,452 of July 29, 1988. This was revoked by Law No. 11,508 in 2007, with alterations





introduced by Laws Nos. 11,732/2008, 12,507/2011 and 12,546/2011. To regulate them two Decrees were passed: No. 6,634/2008 on the workings of the National Council for Export Processing Zones (CNZPE) and No. 6,814/2009 governing ZPEs' tax, foreign exchange, and administration regimes.

[3] Gaya & Michalczewsky (2011).

[4] MDIC (undated) and Laquinto (2012).

[5] Total or partial repayment (tax credit) for duty on imports used in the production of goods for export.





# Regional And Global Overview







## Fifth BRICS Summit, and currency swap between Brazil and China

The Fifth BRICS Summit, with the leaders of Brazil, the Russian Federation, India, China, and South Africa, was held in Durban, South Africa, March 27, under the theme: “BRICS and Africa: Partnership for Development, Integration and Industrialization.”

In accordance with the [eThekweni Declaration](#), the BRICS group expressed its goal to develop a long-term coordination mechanism for various key issues on the global economy and politics, and pointed out the importance of reforming institutions of global governance to reflect the increased influence of the emerging and developing countries. Accordingly, they will seek to deepen their ties with these economies, and with international and regional organizations.

The BRICS’s national export-import banks (EXIMs) and development banks signed a Multilateral Cooperation and Co-Financing Agreement for Sustainable Development, as well as a Multilateral Infrastructure Co-Financing Agreement for Africa. The BRICS countries will also stimulate the creation of a development bank and a contingent reserve arrangement (CRA) to strengthen financial stability.

The Summit also addressed other issues, such as climate change, human rights, multilateral trade negotiations, infrastructure, etc. according to the eThekweni Action Plan, meetings will be held by BRICS authorities in various fields, including economics, currency, and finance; international trade; agriculture; national security; health; people; and science and technology. They will also explore new areas of cooperation, such as public diplomacy, anticorruption cooperation, state-owned enterprises, tourism, energy, and so on.

One of the most important points to emerge from the summit was undoubtedly the signing of a bilateral [local currency swap](#) agreement (reals for yuans) between Brazil and China, aimed at facilitating trade between the two countries. The agreement is for BRL60 billion/CNY190 billion (or approximately US\$30 billion) and will remain in force for three years, with the option to be renewed. Should these liquidity facilities be used, the original amount must be repaid, plus any interest within an agreed term.

Over the past few years, several developing countries have turned to this kind of agreement. These include the currency swaps between Brazil and Argentina, and China and Argentina, signed in 2009, as well as those of China with other developing countries.

### Related articles

- IDB-INTAL. “[4th Summit of BRICS leaders](#)”, *INTAL Monthly Newsletter No. 188*, April 2012.
- IDB-INTAL. “[Currency swap agreement between Argentina and Brazil](#)”, *INTAL Monthly Newsletter No. 157*, August 2009.
- IDB-INTAL. “[China’s greater presence in the world economy: currency swaps](#)”, *INTAL Monthly Newsletter No. 153*, April 2009.



## Integration scenarios in the Pacific

The formation of a dynamic center in the world economy on the Asian continent has brought with it a shift in integration agendas toward the Pacific Basin.

In this respect, it is worth mentioning the 16th negotiating round of the Trans-Pacific Partnership Agreement (TPP), held in March this year. This process, which now includes eleven countries, has gained relevance in the international arena in line with the visible changes in the global economy in recent years.

The agreement's negotiations can be characterized as innovating inasmuch as they include topics that go beyond mere reduction of tariffs. Indeed, common ground was found in the areas of government procurement, investment, services, technical barriers to trade, sanitary and phytosanitary measures, and intellectual property. The upcoming rounds will attempt to solve the most challenging issues, including competition and the environment. The 17th round will be held in Lima, Peru, May 15-24 this year.

The importance of this agreement has grown markedly as a result of two major phenomena: on the one hand, post-crisis economic recovery strengthened the position of developing countries as a driver of growth, particularly in Asia, and, on the other hand, the stagnation of the multilateral negotiations in the framework of the Doha Round held by the World Trade Organization (WTO) has led many countries to seek alternatives in their strategy to expand markets.

The TPP was originally proposed by the countries that form part of the Trans-Pacific Strategic Economic Partnership Agreement, signed in 2005, i.e. Brunei Darussalam, Chile, New Zealand, and Singapore. They were later joined by United States, Australia, Peru, and Vietnam in 2008, and by Malaysia in 2010. [Canada and Mexico](#) were the last countries to join the negotiations, in October 2012, while Japan has made its interest in joining official.[1]

In 2011, these eleven economies accounted for 30% of world GDP and about 20% of total trade, data that clearly illustrate the TPP's potential.

With regard to the configuration of the agreement, a lack of information and transparency have been mentioned in relation to the negotiations, which has given rise to some uncertainty about the actual progress made so far.[2] On the other hand, the participation of United States presumably implies high negotiating standards, which would represent a major challenge for some developing countries seeking to join the scheme.[3]

The relevance of the negotiations for Latin America is reflected in the newly created Pacific Alliance, which enjoys the added participation of Colombia, alongside Mexico, Chile, and Peru, who also belong to the TPP. This process of integration not only aims to liberalize trade among its members, but also to strengthen relations across the whole, where the Asian region is concerned. These economies display similar structures in terms of their economic relations both with United States and the leading Asian economies, with whom they have signed a number of agreements. Other Latin American countries, particularly some MERCOSUR countries, have shown no interest in this integration format for various reasons, among which are the greater complexity of its productive structure and, consequently, the costs involved in a negotiation of this nature. However, there is no doubt that these economies have also boosted their trade and investment links with Asian countries – particularly China – with whom they maintain strong ties of cooperation.

Integration scenarios in the Pacific cannot be exempt from a geopolitical component, and in fact some analysts perceive the TPP, of which United States is part, as a tool to offset the growing power of China.[4] It is interesting to note here that the ASEAN Framework for Regional Comprehensive Economic Partnership (RCEP) was set up in December 2012. This process includes the ten countries of the Association of Southeast Asian Nations (ASEAN) and a further six economies: China, India, and the Republic of Korea (which is not part of the TPP), as well as Japan, Australia, and New Zealand. This group of countries represents[5] 40% of world trade and about half the population. The presence of China, India, and other developing countries could generate a more flexible space for negotiation than the TPP.[6]

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- IDB-INTAL. “[Trans-Pacific Partnership Agreement: Mexico and Canada join negotiations](#)”, *INTAL Monthly Newsletter No.194*, October 2011.
- IDB-INTAL. “[Trans-Pacific Partnership Agreement decides negotiating model](#)”, *INTAL Monthly Newsletter No.184*, December 2011.

[1] Financial Times (2013).

[2] CARI (2013). These objections have been answered by the Office of the United States Trade Representative (OUSTR) (2102).

[3] CARI (2013).

[4] CARI (2013).

[5] Although it has expressed an interest in joining the TPP negotiations, South Korea already has in place trade agreements with most of the Partnership’s members, so the economic benefits would, in its case, probably be fairly limited.

[6] CARI (2013).



## COSIPLAN's progress in facilitating and modernizing border crossings in South America

The meeting of the Technical Executive Group (GTE) on Border Crossings was held in Buenos Aires, Argentina, April 11, as part of COSIPLAN-IIRSA's 2013 Work Plan.[1] The meeting was to move toward defining quality standards and indicators for the management of South American border crossings and was attended by representatives of South American government and the IIRSA Technical Coordination Committee (IDB, CAF, and FONPLATA).[2]

IIRSA's first 10 years (2000-2010) saw actions aimed at turning borders into channels of true integration. This work is part of the sectoral process of "Border Crossing Facilitation," through which an extensive survey was conducted to help determine their typology, as well as the activities needed to improve their operation and expand the provision of services.[3]

With the creation of UNASUR in 2008 and its South American Infrastructure and Planning Council (COSIPLAN) in 2010, the goal of facilitating and modernizing the region's border crossings acquired new impetus. The 2012-2022 Strategic Action Plan (PAE)[4] and the Integration Priority Project Agenda (API),[5] the two instruments that organize the work of the COSIPLAN over the next 10 years, make this area one of their priorities, with 13 of the 88 individual projects API being border crossings.

Works are currently aimed at exchanging experiences across countries in order to collaborate in improving the planning and operation of border crossings, with an emphasis on the integration of binational controls. The countries are also looking into a proposal for quality standards and management indicators to be implemented in the region's border crossings, laying special emphasis on the steps included in the API.

The establishment of standards and management indicators would allow border crossings to be assessed in terms of their levels of operation and service, as well as their evolution over time. This would enable diagnoses to be developed to help take the necessary action to optimize their operation, taking into consideration savings in time and costs, user services, and coexistence with the surrounding populations and the environment.

[1] The South American Infrastructure and Planning Council (COSIPLAN) is the organ of the Union of South American Nations (UNASUR) for political and strategic discussion with the aim of implementing the integration of regional infrastructure in South American countries. The COSIPLAN includes the Initiative for the Integration of Regional Infrastructure in South America (IIRSA) as its technical infrastructure forum. More information on COSIPLAN-IIRSA at <http://www.iirsa.org/Page/Detail?menuItemId=45>.

[2] More information about the meeting at <http://www.iirsa.org/Event/Detail?Id=218>.

[3] More information on the Sectoral Process "Facilitation of Border Crossings" in <http://www.iirsa.org/Page/Detail?menuItemId=78>.

[4] More information about the PAE at <http://www.iirsa.org/Page/Detail?menuItemId=38>.

[5] More information on the API at <http://www.iirsa.org/Page/Detail?menuItemId=39>.





## Other IDB Activities







## IDB loan to help improve iron ore transportation services in Paraguay-Paraná Waterway

The Inter-American Development Bank (IDB) has recently approved a US\$100 million loan to expand and increase efficiency of iron ore transportation along the Paraguay-Paraná Waterway. The project aims to enhance integration between Brazil, Paraguay, Argentina, and Uruguay by improving river transport in the region.

The IDB loan will be directed at financing the purchase of state-of-the art tugs and barges to carry 3.25 million metric tonnes of iron ore per year from deposits in Corumbá, Brazil, to Argentina and/or Uruguay along the Paraguay-Paraná Waterway, under a long-term contract with a subsidiary of the mining company Vale S.A. IDB resources will also be used to train captains, crews, and maintenance personnel on the new vessels.

Sponsored by Hidrovias do Brasil S.A., the project seeks to have the following positive impacts: to increase efficiency in fuel use by deploying state-of-the-art technology; to improve vessels' capacity and maneuverability; and to increase transported volumes thanks to faster transport cycles. The project is also expected to promote the creation of up to 480 jobs.

IDB's financing will be complemented with resources from commercial banks and another development institution.

For more information, see: [\[1\]](#), [\[2\]](#).



## Four energy companies, the AFD, and the IDB agree to explore electricity interconnection of Northern Arc countries

EBS, GEA, EDF, Eletrobras together with the AFD and the IDB aim to establish an electrical interconnection among Suriname, Guyana, French Guiana, and two northern states of Brazil [\(link\)](#).





# INTAL Documentation Center









## Reviews

### Como mejorar la competitividad de las pymes en la Unión Europea y América Latina y el Caribe: Propuestas de política del sector privado. ECLAC. January 2013. 38 pages.


Small and medium enterprises (SMEs) in Latin America and the Caribbean (LAC) and the European Union (EU) play an important role in their countries' economic activity, accounting for approximately 99% of companies and generating 67% of employment. Their levels of productivity are, however, generally lower than larger companies, and display a limited share of exports. In answer to this, the ECLAC document provides a view of the private sector in terms of the actions needed to make SMEs more competitive and internationally minded. The study was based on an opinion poll of 50 business leaders from various different countries across both regions and was organized by the AL/INVEST Program, EUROCHAMBRES, and ECLAC.

The document is organized in five parts. The first part posits that to internationalize SMEs it is essential to include them in global value chains (GVCs). This would enable companies to diversify risks, decrease their dependence on domestic markets, increase their production and export capacity, and to benefit from technology transfer, human resources training, and access to quality standards.

The second part argues that there is a great potential for improving the business opportunities and internationalization of SMEs in the EU and LAC. However, the leaders consulted contend that there is a need to invest the links between the two regions with dynamism through more concrete and concerted action. This includes participating in trade fairs and business missions abroad, the offer of targeted training and technical assistance by sector, and enhanced liaison between large and small companies.

The third part develops the main policies to improve the productivity and internationalization of SMEs. First, it is argued that there is a need to reduce the gap in productivity between SMEs and large companies, particularly wide in LAC, the private sector identifies four priority policy areas:

1. support for innovation in products and processes;
2. provision of facilities for market access and business opportunities;

- 
3. stimulus for cooperation between companies and productive liaison;
  4. access to financing in order to expand capabilities and skills, and to implement strategies.

Second, it provides the opinion leaders surveyed about how to move toward the internationalization of SMEs. Accordingly, it is proposed:

- To develop administrative capabilities and structures for internationalization.
- To provide clear and concise information on the support policies, actions, and services available;
- To participate in GVCs to help SMEs boost the volume and improve the competitiveness of exports.

The fourth part stresses the need to promote long-term cooperation and complementarity between companies in the two regions. It specifically recommends prioritizing action in the following areas: renewable energy, clean technologies, the green economy, and biotechnology. Latin American entrepreneurs place great importance on areas related to infrastructure, such as energy, transport, and broadband, and the paper underlines the need to incorporate an innovation-centered perspective in national SME policies in order to identify strategic sectors and make viable the realization of business opportunities between the two regions.

Last, it provides a recap and general conclusions that emphasize the importance of improving the exchange of information between the EU and LAC private sectors, as well as improving the visibility and dissemination of SME support programs. All in all, the ECLAC document is a useful overview of the main areas that leaders of the private sector think need focusing on in order to improve SMEs' productivity and participation in global markets in both regions.

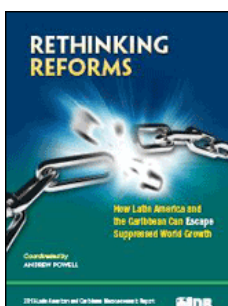


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## Monthly Highlights

\* Powell, A., coord. (2013). Replantear las Reformas : Cómo América Latina y el Caribe pueden escapar del menor crecimiento mundial = Rethinking reforms : How Latin America and the Caribbean can escape suppressed world growth. Washington: BID.



**Autor:** Powell, Andrew, coord.

**Título:** Replantear las Reformas : Cómo América Latina y el Caribe pueden escapar del menor crecimiento mundial = Rethinking reforms : How Latin America and the Caribbean can escape suppressed world growth

**Edición:** Washington: BID, Marzo 2013 [101 p.]


**Serie:** Informe Macroeconómico de América Latina y el Caribe

**Temas:** <CRECIMIENTO ECONOMICO><DESARROLLO ECONOMICO><PRODUCTIVIDAD><COMPETITIVIDAD><RECURSOS HUMANOS><MERCADO DE TRABAJO><INVERSION PUBLICA><INFRAESTRUCTURA><PRODUCTO BRUTO INTERNO, PBI><INDICADORES ECONOMICOS><POLITICA FISCAL><ESPAÑOL (O CASTELLANO)><INGLÉS>

**Geográficos:** <AMÉRICA LATINA><CARIBE>

**Resumen:** Las proyecciones del crecimiento global han disminuido desde el año pasado y el crecimiento podría verse menguado por debajo de su potencial durante muchos años. Un menor crecimiento global, con todos los demás factores iguales, implicaría un menor crecimiento en América Latina y el Caribe. Al mismo tiempo, los evidentes límites al uso potencial de medidas de política monetaria y fiscal en la región plantean otra restricción. Por consiguiente, los países deberían contemplar futuras reformas estructurales para mejorar las perspectivas económicas y





escapar del menor crecimiento global. Si todos los países introdujeran reformas para acelerar el crecimiento en un promedio del 1,5 per cent, el efecto en el conjunto de la región podría ser del orden de un 2,4 per cent de crecimiento adicional al año. El informe macroeconómico de América Latina y el Caribe de 2013 evidencia que existe un gran potencial para aumentar la tasa de crecimiento de la región mediante la reasignación de recursos existentes.

**Nota de contenido:**

**Capítulo 1 Resumen ejecutivo** [p. 1]

**Capítulo 2:** El menor crecimiento mundial [p. 5]

**Capítulo 3:** Fomentar el crecimiento ante vientos globales desfavorables [p. 11]

**Capítulo 4:** Los límites de la política fiscal y monetaria [p. 19]

**Capítulo 5:** El crecimiento, la productividad y la asignación

**Capítulo 6:** La reforma de los mercados laborales [p. 37]

**Capítulo 7:** Crear espacio para crecer: el ahorro interno y la inversión en infraestructura [p. 49]

**Capítulo 8:** Conclusiones y recomendaciones [p. 67]

**Referencias** [p. 71]

**Apéndices**

**Apéndice A:** Sobre los precios de los productos primarios y los ingresos fiscales [p. 83]

**Apéndice B:** Sobre los regímenes de política monetaria, los requisitos de reservas y la credibilidad del control de la inflación [p. 85]

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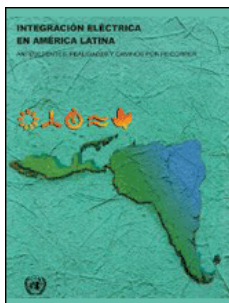
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English Version ([texto completo](#)). Si no pudo acceder haga click [aquí](#)

\* Ruchansky, B., coord. (2013). Integración eléctrica en América Latina: antecedentes, realidades y caminos por recorrer. Santiago de Chile: CEPAL.



**Autor:** Ruchansky, Beno, coord.

**Título:** Integración eléctrica en América Latina: antecedentes, realidades y caminos por recorrer

**Edición:** Santiago de Chile: CEPAL, Febrero de 2013 [150 p.]

**Serie:** Documento de Proyecto; 524

**Temas:** <INICIATIVA PARA LA INTEGRACION DE LA INFRAESTRUCTURA REGIONAL SURAMERICANA, IIRSA><SISTEMA DE SISTEMA DE INTERCONEXION ELECTRICA PARA LOS PAISES DE AMERICA CENTRAL, SIEPAC><INTEGRACION ENERGETICA><PROCESOS DE INTEGRACION><SUSTITUCION DE IMPORTACIONES><EMPRESAS TRANSNACIONALES><RECURSOS ENERGETICOS><ENERGIA HIDROELECTRICA><ESPAÑOL (O CASTELLANO)>

**Geográficos:** <AMERICA LATINA><AMERICA CENTRAL><AMERICA DEL SUR><ARGENTINA><BRASIL>

**Resumen:** A pesar de que existen importantes beneficios económicos, sociales y ambientales en la integración de los sistemas eléctricos de dos o más países la región no ha avanzado lo suficiente al ritmo de las expectativas planteadas en los objetivos de dichos procesos. En este documento, se evidencian las barreras y obstáculos que han presentado los procesos de integración de los sectores eléctricos entre países y al interior de las subregiones de América Latina. La CEPAL ha considerado importante poner a disposición de los países de la región el presente documento respetando las ideas de los expertos que elaboraron los estudios de casos. La visión que entregan los autores puede no ser compartida por el abanico de los actores que intervinieron en esos procesos o por los tomadores de esas decisiones; sin embargo, consideramos valioso conocer estas experiencias y sacar las lecciones que de ellas se podrían desprender para avanzar en el proceso de integración.

#### **Nota de contenido:**

##### **Introducción [p. 7]**

**I:** Antecedentes de los procesos de integración en América Latina [p. 13]

**A:** Integración político-económica [p. 13]


**1:** Predominio del modelo de sustitución de importaciones [p. 14]

**2:** El modelo de mercado: impulso a la apertura económica y a la participación del capital privado [p. 15]

**3:** Hacia la implementación de modelos más flexibles y con una visión

integral [p. 16]	
4: Las translatinas [p. 17]	
5: El papel del Brasil [p. 18]	
6: Conclusiones [p. 19]	
B: Integración eléctrica [p. 19]	
1: El rol del factor energético en la integración regional [p. 19]	
2: Antecedentes de la integración eléctrica regional [p. 20]	
3: Conclusiones [p. 27]	
C: Anexo [p. 29]	
D: Bibliografía [p. 33]	
II: Integración eléctrica Perú-Ecuador-Colombia [p. 35]	
A: Síntesis [p. 35]	
B: Antecedentes, situación actual y perspectivas de la integración eléctrica Perú-Ecuador-Colombia [p. 36]	
1: Evolución de los intercambios de energía [p. 36]	
2: Las perspectivas desde la óptica de la planificación eléctrica nacional [p. 37]	
C: Contexto político y marco regulatorio [p. 38]	
1: Algunos aspectos políticos y estratégicos [p. 38]	
2: El marco regulatorio [p. 41]	
D: Intercambios de energía [p. 50]	
1: Infraestructura [p. 50]	
2: Los flujos de las TIE en la década del 2000 [p. 54]	
E: Las perspectivas futuras [p. 60]	
1: Los planes de expansión nacionales: expansión para la autosuficiencia [p. 60]	
2: Escenarios de generación a largo plazo [p. 63]	
F: Bibliografía [p. 68]	
III: El Proyecto Siepac y la conformación del mercado eléctrico regional de América Central [p. 69]	
A: El largo camino de la integración eléctrica regional [p. 69]	
B: La evolución de la demanda de electricidad [p. 71]	
C: La historia de los intercambios [p. 73]	
D: El diseño del mercado eléctrico regional [p. 76]	
1: El mercado regional de los intercambios de energía [p. 76]	
E: El sistema de transmisión regional [p. 80]	
1: Ampliaciones de la Transmisión [p. 80]	
2: Sistema de Tarifas de Transmisión Regional [p. 80]	
3: Derechos de Transmisión (DT) [p. 81]	
F: El andamiaje institucional [p. 81]	
1: Comisión Regional de Interconexión Eléctrica (CRIE) [p. 81]	
2: El Ente Operador Regional (EOR) [p. 81]	
3: La Empresa Propietaria de la Red (EPR) [p. 82]	
G: Las interconexiones extraregionales: México y Colombia [p. 83]	
1: Interconexión México-Guatemala [p. 83]	

- 2: Interconexión Colombia-Panamá [p. 84]
- H: Los beneficios regionales del Proyecto Siepac [p. 85]
- I: Los desafíos de la integración eléctrica regional [p. 86]
- J: Bibliografía [p. 90]
- IV: Antecedentes, situación actual y perspectivas de la integración eléctrica de Argentina con sus países vecinos [p. 91]
  - A: Integración eléctrica Argentina-Brasil [p. 91]
    - 1: Interconexión de Sistemas Eléctricos [p. 91]
    - 2: Recursos hidráulicos compartidos. Argentina-Brasil: Río Uruguay y su afluente Río Pepirí Guazú [p. 100]
  - B: Integración eléctrica Argentina-Paraguay [p. 101]
    - 1: Interconexión de Sistemas Eléctricos [p. 101]
    - 2: Venta de energía en tránsito de Paraguay a Uruguay [p. 103]
    - 3: Recursos hidráulicos compartidos. Argentina-Paraguay [p. 106]
  - C: Integración eléctrica Argentina-Uruguay [p. 109]
    - 1: Interconexión de Sistemas Eléctricos [p. 109]
    - 2: Aprovechamiento de los recursos hidráulicos compartidos Argentina - Uruguay [p. 115]
  - D: Integración eléctrica Argentina-Chile [p. 117]
    - 1: Interconexión y exportación de energía eléctrica a Chile [p. 117]
  - E: Integración eléctrica: Oportunidades, obstáculos y prospectiva [p. 118]
- V: Integración eléctrica internacional del Brasil: Antecedentes, situación actual y perspectivas [p. 125]
  - A: El sistema eléctrico brasileño [p. 125]
    - 1: La matriz eléctrica brasileña [p. 125]
    - 2: Potencial energético y perspectivas de la matriz eléctrica [p. 128]
    - 3: Características del modelo del sector eléctrico brasileño [p. 131]
  - B: Integración eléctrica e internacionalización económica [p. 133]
    - 1: Rol de Eletrobras en la integración eléctrica [p. 134]
    - 2: La lógica económica de la integración eléctrica desde la óptica brasileña [p. 136]
  - C: El modelo comercial brasileño [p. 137]
  - D: Experiencias de integración y el modelo comercial brasileño [p. 140]
  - E: Perspectivas para la importación y exportación de energía eléctrica por parte del Brasil [p. 142]
    - 1: Importación y exportación de energía firme [p. 142]
    - 2: Importación y exportación de energía excedente por parte del Brasil [p. 143]
  - F: Proyectos de integración eléctrica internacional del Brasil [p. 144]
    - 1: Central Hidroeléctrica Binacional de Itaipú: Paraguay-Brasil [p. 144]
    - 2: Conversora de Garabí y CTE AES Uruguayana: Argentina-Brasil [p. 145]
    - 3: Conversora de Rivera: Uruguay-Brasil [p. 146]
    - 4: Línea de transmisión de Guri a Roraima: República Bolivariana de



Venezuela -Brasil [p. 146]

5: Central Térmica de Cuiabá: Estado Plurinacional de Bolivia-Brasil [p. 147]

G: Conclusiones [p. 147]

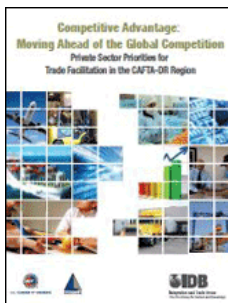
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**\* Competitive Advantage : Moving Ahead of the Global Competition : Private Sector Priorities for Trade Facilitation in the CAFTA-DR Region. (2013). Washington: BID.**



**Título:**Competitive Advantage : Moving Ahead of the Global Competition : Private Sector Priorities for Trade Facilitation in the CAFTA-DR Region

**Edición:**Washington: BID, March 2013 [85 p.]

**Temas:**<TRATADO DE LIBRE COMERCIO DE AMERICA CENTRAL, CAFTA><INTEGRACION ECONOMICA><INTEGRACION REGIONAL><ACUERDOS COMERCIALES MULTILATERALES><ACUERDOS DE COMERCIO DE SERVICIOS><EMPRESAS><INGLES>

**JEL:**F15; F13; F53

**Geográficos:**<AMERICA LATINA>

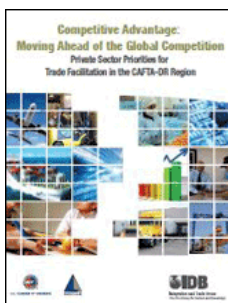
**Resumen:**This report is the result of a joint project between the Inter-American Development Bank (IDB), through its Integration and Trade Sector (INT), and the Association of American Chambers of Commerce in Latin America's (AACLAA) secretariat at the U.S. Chamber of Commerce (USCC). Aiming to contribute to CAFTA-DR authorities' efforts to identify trade facilitation challenges and solutions, these institutions, independently and in the context of the IDB-USCC Memorandum of Understanding, developed a survey and conducted focus groups on trade facilitation priorities in the CAFTA-DR region, aiming to refine and consolidate private sector recommendations to governments. Based on the issues identified through these joint efforts, this report recommends a series of measures that would have a positive and sizable impact on the flow of goods and services in the CAFTA-DR region.

**Accesos al documento:**

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## \* Os BRICS na OMC : Políticas Comerciais Comparadas de Brasil, Rússia, Índia e África do Sul. (2013). Brasília: IPEA.



**Título:** Os BRICS na OMC : Políticas Comerciais Comparadas de Brasil, Rússia, Índia e África do Sul

**Otros responsables:** Thorstensen, Vera; Machado Oliveira, Ivan Tiago

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**Temas:** <CONDICIONES POLITICAS><ACUERDOS COMERCIALES MULTILATERALES><ORGANIZACION MUNDIAL DEL COMERCIO><GENERAL AGREEMENT ON TARIFF AND TRADE><BARRERAS COMERCIALES><POLITICA COMERCIAL><AGRICULTURA><RONDA DE DOHA><LEGISLACION ANTIDUMPING><PORTUGUES>

**Geográficos:** <BRASIL><INDIA><RUSIA><CHINA><SUDAFRICA>

**Resumen:** O objetivo deste livro é realizar uma análise comparada das políticas comerciais decada integrante do BRICS, tendo a Organizacao Mundial de Comércio (OMC) como quadro de referencia. Assim, busca-se examinar a insercao de cada um deles no comércio internacional, bem como sua participacao no regime multilateral de comércio, tanto em seu pilar diplomático-jurídico, o sistema de solucao de controvérsias, quanto em seu pilar político-negociador, as negociacoes da Roda da Doha, nas quais se observa um importante exercício de articulacao entre os países do grupo.

### Nota de contenido:

#### Introdução

Capítulo I: Os Brics Como Atores Na Organização Mundial Do Comércio

Capítulo II: O Perfil Dos Brics No Comércio Internacional

Capítulo III: Perfil Tarifário Dos Brics

Capítulo IV: Agricultura

Capítulo V: Barreiras Técnicas, Sanitárias E Fitossanitárias

Capítulo VI: Defesa comercial

Capítulo VII: Serviços

Capítulo VIII: Propriedade Intelectual

Capítulo IX: Investimentos

Capítulo X: Acordos Plurilaterais

Capítulo XI: Novos Temas

Capítulo XII: Acordos Preferenciais De Comércio

Capítulo XIII: Atuação Dos Brics No Arguimento De Solução De Controvérsias da OMC

Capítulo XIV: Participação Dos Brics Na Roda Da Doha Os Brics Na OMC: Sínteses e Conclusões



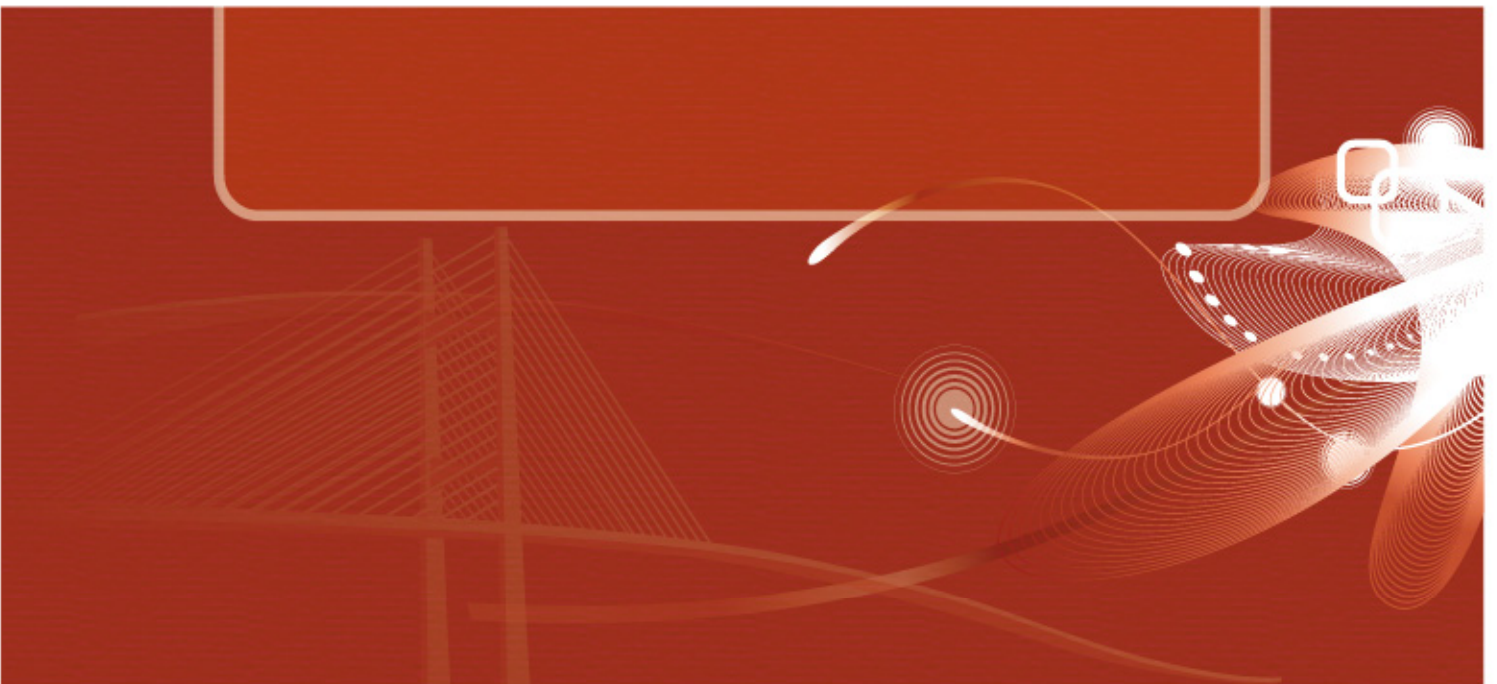
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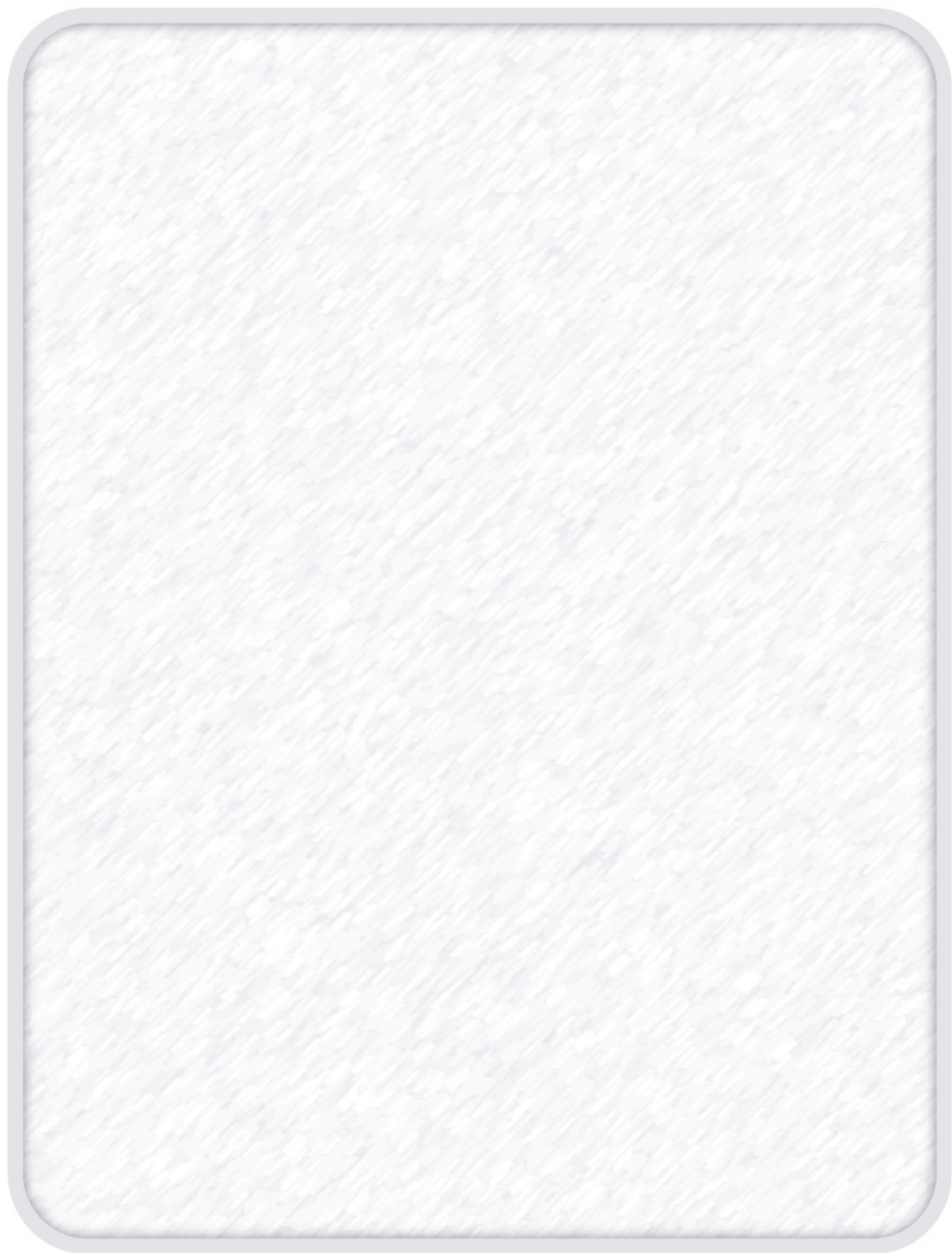
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