Institute for Public Policy Research

BRIEFING

HAVE YOUR CAKE OR EAT IT?

NEW FINDINGS ON PUBLIC ATTITUDES TO BREXIT (PART TWO)

Marley Morris

March 2018

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INTRODUCTION

With the March European Council fast approaching, the UK government has begun to set out in more detail its proposal for a future relationship with the EU after the end of the post-Brexit transition period. Yet, as the government's position becomes clearer, in Brussels there is still widespread scepticism.

Critics believe the UK government wants to 'have its cake and eat it': the proposals seek both frictionless trade with the EU and a soft Irish border, while at the same time securing a fully independent trade policy; continued free trade in goods and services alongside restriction on the free movement of people; and mutual recognition combined with regulatory divergence. It has been suggested within the EU institutions that these objectives are incompatible, and that the UK will consequently face major trade-offs as the negotiations progress.

This report, based on new polling of public attitudes, explores the public's preference for different trade scenarios when faced with a number of difficult Brexit trade-offs.

TRADE-OFFS

Trade negotiations inherently involve trade-offs: each country has its own interests, and a negotiation requires some give and take from both sides. With respect to the Brexit negotiations, however, the trade-offs are particularly ingrained and challenging. The UK government's red lines – an independent trade policy, sovereignty over law-making, an end to the free movement of people – appear incompatible with the EU's requirements for a close relationship with the single market (European Commission 2017). This means that the UK government could at some point be forced to choose between maintaining its red lines or prioritising a close trading relationship. While in the prime minister's Mansion House speech she recognised that the government's position would entail a lower level of access to the single market than currently exists, many of the fundamental trade-offs were left unaddressed (May 2018). Even if a compromise can be found – as we proposed in our recent paper proposing a 'shared market' between the UK and the EU – this still requires the government making a judgment about its relative priorities (Kibasi and Morris 2017).

There are three areas in particular that are likely to require trade-offs.

First, it is likely that the UK government will have to choose between maintaining a customs union with the EU or sacrificing a soft border in Northern Ireland (Rollo and Holmes 2017). A customs union is necessary, albeit not sufficient, for maintaining a soft border, because without a customs union additional border checks (such as rules of origin checks) would be required. At the same time, a full customs union with the EU would restrict the UK's ability to make independent trade deals, because it would require the UK to follow the EU's common external tariff – that is, the UK would have to charge the same import duties on goods from third countries as the rest of the EU. In theory, the UK would still be able to independently negotiate agreements with countries that relate to aspects of trade irrespective of import tariffs – for example on trade in services – but a customs union would most likely limit the UK's options in practice, as the government would not be able to offer tariff reductions to leverage favourable deals (Stojanovic 2017).

Some have suggested compromise options – for instance, the Institute of Directors' proposal for a partial customs union applying to industrial and some limited processed agricultural goods, similar to Turkey's customs union with the EU (Rension 2018). But such proposals risk being insufficient for maintaining a soft Irish border – and in any case, they would still in part restrict any future independent trade policy.

As things stand, the government has both committed to a soft Irish border in the withdrawal agreement (including a fall-back option of 'regulatory alignment' on relevant areas of the single market and customs union (European Council 2017)) and ruled out a customs union with the EU. Moreover, the technical solutions the government has previously proposed to obviate the need for a hard border have not been considered sufficient by the European Commission (Guarascio 2017). As the negotiations continue, the UK may be forced to choose which it should prioritise: independent trade or a soft Irish border.

Second, EU leaders have repeatedly stated that the four freedoms of goods, services, capital and people are 'indivisible' and that restrictions on the free movement of people are not compatible with retaining single market membership (Barnier 2017a). The free movement of services is particularly at risk from any changes to the current rules on EU immigration. This is because the provisions for ‘regulatory alignment’ in the withdrawal agreement to guarantee a soft Irish border may ultimately result in similar arrangements for goods as exist now, which would mean that any trade-off for restricting EU immigration would fall to limits on access to EU services markets. Indeed, some analysts have argued that the most plausible compromise outcome of the Brexit negotiations to ensure a soft Irish border would be the ‘Jersey option’, which would continue the free movement of goods between the UK and the EU but restrict the free movement of services (Springford and Lowe 2018).

Moreover, the free movement of services and people are closely interrelated – for instance, restrictions on labour mobility between the UK and the EU could hamper the movement around the EU of lawyers, accountants and others offering professional services. The EU could therefore force the UK to choose between placing controls on EU migration and accessing EU service markets on the same terms as now post-Brexit.

Third, as we highlighted in the first briefing in this series, EU chief Brexit negotiator Michel Barnier has said that the UK must choose between maintaining the ‘European model’ of high consumer, employment, environmental and food standards, or moving away from this model to align more closely with the US (Barnier 2017b). Accordingly, the European commission expects the UK to retain a ‘level playing field’ with the EU as a requirement for a comprehensive free trade agreement, including common rules on fair competition, taxation and state aid, and aligned regulatory standards (European Commission 2018).

On the other hand, if the UK is to make use of its independent trade policy post-Brexit, then the biggest gains from trade will not be through reductions in tariffs, which are already low, but through agreements on regulations. In particular, average tariffs between the EU and the US, the UK’s biggest trade partner outside the EU, are only around 1.6 per cent; substantial gains from trade are therefore contingent on greater regulatory alignment on areas like food products (Dhingra 2017). Therefore, even if the UK opts for a more distanced relationship with the EU, outside of a customs union and unaligned to the single market, it will nevertheless need to choose between aligning with EU rules on state aid, tax, and standards to secure a EU trade deal or diverging from these rules to instead seek deeper trade ties with the US (Morris 2018). Greater alignment with the US would in turn risk a loosening of regulatory standards – notably in food safety, where standards tend to be lower (Millstone 2017).[1]

The UK is therefore expected to be forced to confront a series of difficult trade-offs in the coming negotiations. In the remainder of this briefing, we explore how the public respond when confronted with examples of these trade-offs over Brexit.

1 For instance, due to safety considerations the EU currently bans the importation of US beef from cattle treated with growth-promoting hormones (Millstone 2017).

OUR SURVEY

In order to explore public attitudes to different Brexit trade-offs, we have commissioned new public opinion research from the polling company Opinium. The online survey took place between the 19 and 22 January 2018 and sampled a total of 2,004 UK adults. The survey was weighted to reflect a nationally representative audience.

We surveyed the public on two sets of questions. First, we asked respondents whether they wanted to retain, tighten, loosen, or remove a range of EU rules, relating to key areas of consumer, financial, employment and environmental policy. Second, we posed a series of potential trade-offs to respondents about how future trading arrangements would interact with domestic policy. Our earlier briefing details the results from the first question; this briefing focuses on the results from the second.

We asked respondents to choose between a series of binary conflicting options, described using language as clear and transparent as possible. Our aim was to use these binary choices as a means of identifying the priorities of the public. We framed the scenarios as 'potential' choices, recognising that some of the questions relate only to hypothetical trade-offs and not to definitive future choices. We asked respondents which of two outcomes they would prefer, allowing for a 'don't know' option in case they were not sure how to answer the question. In some cases, we simplified the trade-off to ensure readability and clarity for respondents.

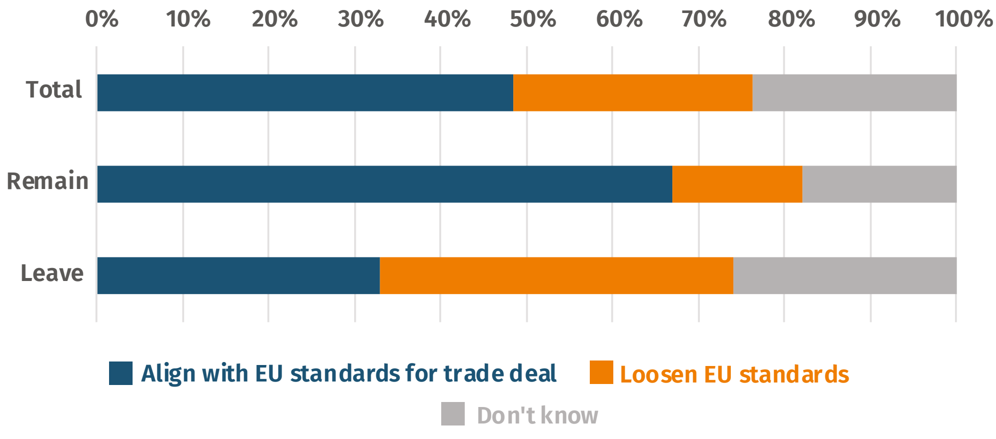
We selected the examples on the basis of the previous section's analysis of potential Brexit trade-offs. We asked one question focusing on the trade-off between the soft Irish border and an independent trade policy; we asked one question focusing on the trade-off between controls on immigration and the free movement of services; we asked one question focusing on the trade-off between a trade agreement with the US and food safety standards; and we asked two questions focusing on the trade-off between securing a trade deal with the EU and maintaining a 'level playing field' (one about consumer, employment and environmental standards, the other about state aid).

In the following sections we highlight the three most important findings from the second part of the survey. Full details of the survey questions can be found in the annex to this briefing.

FINDING 1: THE PUBLIC FAVOUR CONTINUED ALIGNMENT WITH EU STANDARDS OVER DEREGULATION

We found in our previous briefing that the public strongly support retaining or strengthening a range of EU-derived consumer, employment and environmental regulations (Morris 2018). The public's commitment to high standards are again confirmed by their answers to our Brexit trade-offs. When asked whether the UK should align with EU consumer, employment and environmental standards to secure a far-reaching EU trade deal or whether they should instead loosen those standards to save costs for UK business, around half of the public (49 per cent) prefer alignment with EU standards, with only a quarter (28 per cent) preferring deregulation.[2] Excluding those who didn't know how to answer the question, around two-thirds (64 per cent) prefer continued alignment with EU standards. This result is significant because it not only shows that the public favour high standards over deregulation post-Brexit, as we argued in our previous briefing; it shows that they in fact explicitly favour alignment with standards originating from the EU.

FIGURE 1: MORE PEOPLE FAVOUR ALIGNING WITH EU CONSUMER, EMPLOYMENT AND ENVIRONMENTAL STANDARDS FOR A FAR-REACHING EU TRADE DEAL THAN FAVOUR DEREGULATING POST-BREXIT



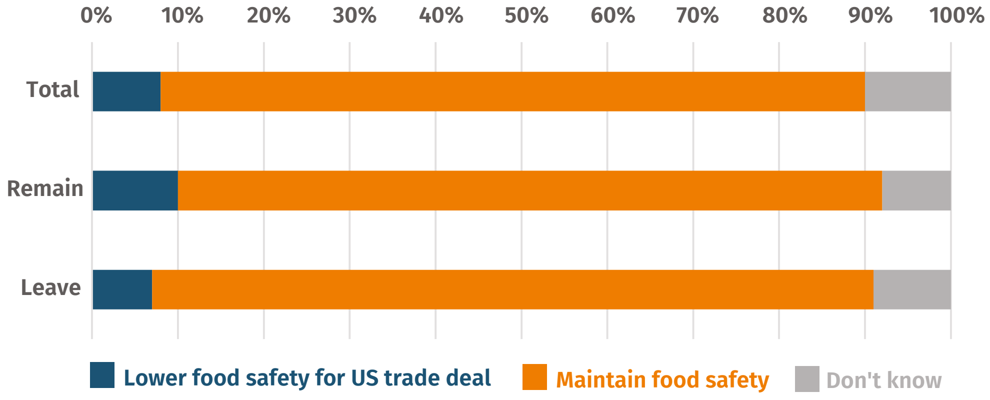
Source: IPPR/Opinium Survey, 19–22 Jan 2018

Interestingly, even out of those who do state a preference for loosening EU standards, the vast majority nevertheless support retaining or extending the individual policies we tested in the first briefing: for instance, 70 per cent of those who favour loosening EU standards back maintaining or tightening the Working Time Directive, 72 per cent back keeping or raising renewable energy targets, and 89 per cent back preserving or extending consumer cancellation rights. This suggests that some respondents were reluctant to support the idea of aligning with EU standards in principle, but in practice supported conforming to these standards when they were described without direct reference to the EU.

On the other hand, when asked whether the UK should lower food safety standards to secure a trade deal with the US, only 8 per cent of the public agree; 82 per cent prefer to retain current standards. This is the only trade-off where remainers and leavers are overwhelmingly united on their choice: leave supporters are just as opposed to deregulation as remain supporters, and there is strong opposition across the political spectrum.

2 It might be argued that there should be a third option for respondents for this question, since choosing to not align with EU consumer, employment and environmental standards does not necessarily entail deregulation. However, as we argued in our first briefing in this series, it is likely that if the UK does choose to diverge from EU standards then it will in practice mean lowering standards, in an attempt to reduce cost for business and achieve closer alignment with the US (Morris 2018).

FIGURE 2: THE VAST MAJORITY OF THE PUBLIC ARE UNWILLING TO SACRIFICE MAINTAINING FOOD SAFETY STANDARDS FOR A TRADE DEAL WITH THE US



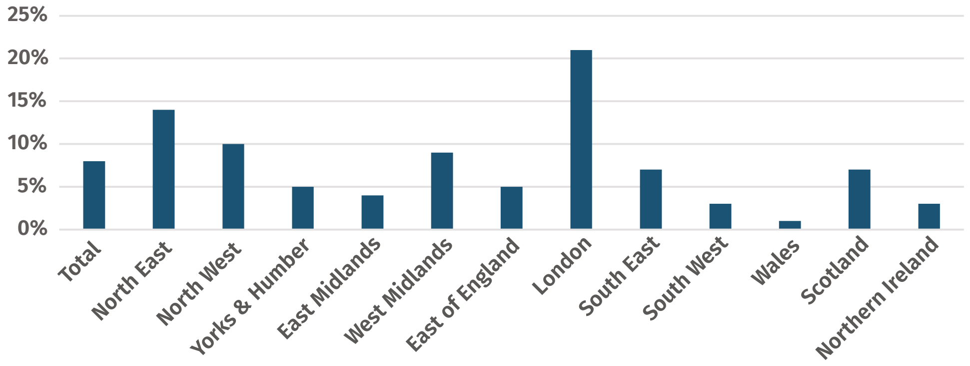
Source: IPPR/Opinium Survey, 19–22 Jan 2018

While there are few supporters for deregulating food safety standards among any demographic group, interestingly it is professionals, Londoners and younger respondents who tend to be the most relaxed about accepting food safety deregulation in order to secure a US trade deal: 17 per cent of 18–34-year-olds, 20 per cent of higher-grade professionals/managers/administrators, and 21 per cent of Londoners are in favour, compared to 8 per cent on average. This suggests that support for a US trade deal with lower food standards is not necessarily concentrated among Leave voters, but is instead concentrated among young middle class Londoners.

Indeed, there is a similar pattern with respect to our question on trade with the EU: Londoners and younger respondents tend to prefer regulatory alignment with the EU in return for an EU trade deal over lowering standards. In one light, this appears contradictory: the same groups express a preference both for deregulation to secure US trade and for high regulations to secure EU trade. The likely explanation is that these groups are simply more relaxed about trade, and are more willing to make compromises – of whatever sort – to secure free trade agreements with other countries.

FIGURE 3: THERE IS A STRONGER PREFERENCE IN LONDON THAN IN THE REST OF THE COUNTRY FOR LOWERING FOOD SAFETY STANDARDS TO SECURE A US TRADE DEAL

Percentage of public who would prefer to lower food safety for US trade over maintaining standards



Source: IPPR/Opinium Survey, 19–22 Jan 2018

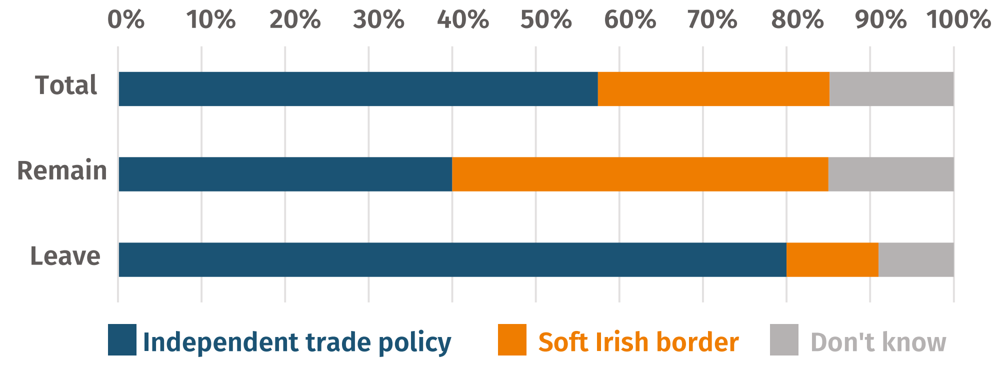
FINDING 2: THE PUBLIC ARE IN FAVOUR OF 'TAKING BACK CONTROL'

When confronted with trade-offs that impinge on issues of sovereignty, the public tend to favour 'taking back control' over other priorities.

First, on one of the most contentious potential trade-offs facing the government – whether to have an independent trade policy at the expense of retaining a soft Irish border – a majority of the public (58 per cent) favour an independent trade policy, compared to 28 per cent who favour a soft Irish border. A recent YouGov poll similarly showed a preference for an independent trade policy over the avoidance of customs controls between Britain and the EU: 49 per cent wanted Britain to be able to make free trade deals with countries elsewhere in the world at the expense of customs controls between Britain and the EU, while only 13 per cent wanted to avoid customs controls at the expense of losing the ability to make free trade deals (YouGov 2018). This indicates that the public have a consistent preference for an independent trade policy over other considerations, whether they are framed in relation to the Irish border or to UK–EU trade flows in general.

Yet a regional breakdown suggests this issue is nevertheless a divisive one for the UK: the one part of the UK that favours a soft Irish border over an independent trade policy is Northern Ireland (there is a 45 per cent preference for a soft border versus a 40 per cent preference for an independent trade policy). This confirms that any move that risks the soft border on the island of Ireland would face considerable opposition in Northern Ireland.

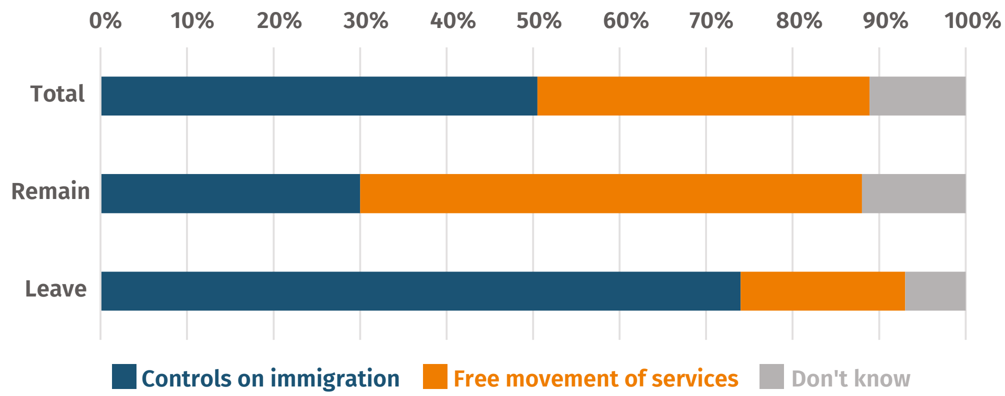
FIGURE 4: THERE IS A PUBLIC PREFERENCE FOR HAVING AN INDEPENDENT TRADE POLICY OVER PROTECTING THE SOFT IRISH BORDER



Source: IPPR/Opinium Survey, 19–22 Jan 2018

On a second contentious trade-off – whether to control and restrict EU immigration at the expense of single market treatment in services – 50 per cent of the public favour immigration controls, while 38 per cent favour trade in services. This is the trade-off that finds the least consensus among respondents: there is only a 12 percentage point difference between the two preferences, compared to more than 20 percentage points for every other trade-off. Nevertheless, as with our question on trade independence, half of the public favour 'taking back control' on immigration, even if this means sacrificing EU market access.

FIGURE 5: MORE PEOPLE FAVOUR CONTROLS ON IMMIGRATION THAN FAVOUR RETAINING CURRENT TRADING ARRANGEMENTS FOR SERVICES FIRMS



Source: IPPR/Opinium Survey, 19–22 Jan 2018

For both of these questions, it is leave voters that state the strongest preference for 'taking back control'. There is a notably strong preference for an independent trade policy among leave voters (80 per cent prefer independent trade to a soft Irish border, whereas only 11 per cent prefer the reverse), while remain voters slightly favour protecting the soft Irish border (45 per cent opt for a soft Irish border, whereas 40 per cent opt for independent trade). Even more strikingly, while leave voters strongly favour controls on EU immigration (74 per cent of leave voters favour controls compared to 19 per cent who favour trade in services), remain voters strongly favour market access for services firms (58 per cent prefer trade in services compared to 30 per cent who prefer controls on EU immigration).

Our findings on immigration are somewhat different to other polling that has tested the trade-off between immigration and the single market, which has shown an even split between those who prioritise controls and and those who prioritise market access (e.g. Curtice 2018). This is most likely because the wording of our question more precisely singled out particular types of businesses that could be most affected by exiting the EU's single market in services, such as financial service firms and telecommunication companies. This may have resulted in a weaker preference for the single market option compared to other surveys, given public disapproval towards some services-based businesses.

FINDING 3: THE PUBLIC WANT TO 'TAKE BACK CONTROL' TO EXPAND THE ROLE OF THE STATE, NOT REDUCE IT

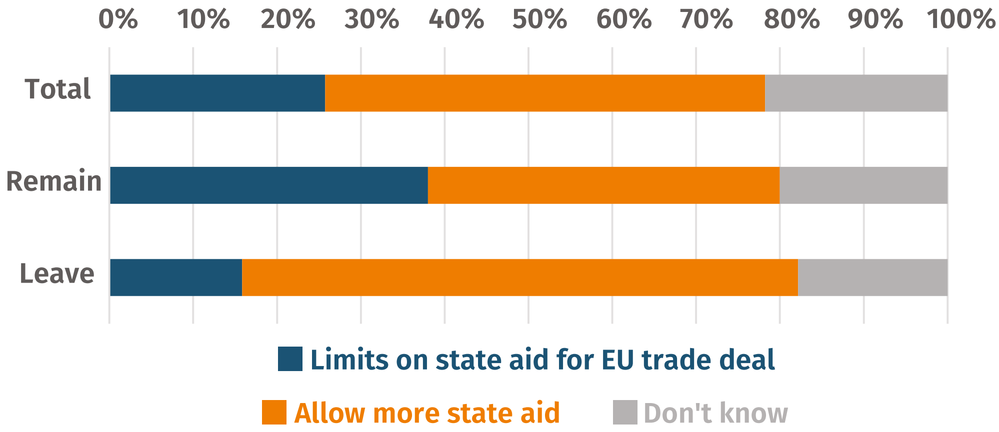
Yet support for 'taking back control' post-Brexit does not translate into an endorsement of a 'buccaneering', deregulated vision of Brexit. Indeed, our polling suggests that the public want a greater role for the state post-Brexit – with higher environmental standards, tougher regulation and greater use of state aid, even at the cost of freer trade.[3]

Our previous briefing found support for higher environmental targets and tougher financial regulation post-Brexit, while this briefing has found that the public are willing to sacrifice a trade deal with the US in order to protect food safety standards. More strikingly still, the public appear to place more weight on returning powers to expand the use of state aid than to deregulate. We found earlier in this briefing that, when confronted with a trade-off on standards, only 28 per cent of the public prefer to loosen EU standards to save costs for businesses, while 49 per cent prefer continued alignment to secure a far-reaching EU trade deal. By contrast, when confronted with a similar trade-off on state aid, a total of 53 per cent prefer to allow the government to expand state aid to protect particular industries, while only 26 per cent prefer continued conformity with EU state aid rules to secure a far-reaching EU trade deal. This could simply be because, as we found in our previous briefing, there is little support for deregulation regardless of the implications for trade policy; whereas the benefits of state aid to support British businesses have greater intrinsic appeal for the public.[4]

3 This does not mean that the public are inherently protectionist; but it does suggest that, without hearing an explicit case for the economic benefits of free trade, there is limited prima facie appeal for the signing of free trade agreements.

4 It is possible that the phrasing of our question on state aid may inadvertently contribute to it receiving a more positive response than our question on standards, as it frames the choice as 'allow[ing]' the government to make more use of state aid, rather than 'loosen[ing]' standards. But given respondents' answers to our other questions – where they largely favour retaining or strengthening standards – it is unlikely that this subtle difference in phrasing can explain the significant variation in results between the two questions.

FIGURE 6: MORE PEOPLE FAVOUR THE UK BEING ALLOWED GREATER USE OF STATE AID THAN FAVOUR KEEPING EU STATE AID RULES TO SECURE A FAR-REACHING TRADE DEAL



Source: IPPR/Opinium Survey, 19–22 Jan 2018

LESSONS FOR THE NEGOTIATIONS

The results of our survey suggest the public hold nuanced views on the outcome of the Brexit negotiations. These findings reveal important lessons for both those advocating a close relationship with the single market and those arguing for a more radical rupture post-Brexit. On the one hand, there is public support for 'taking back control' of trade and migration policy. Yet the public preference for how to use these new legislative powers is not necessarily to deregulate and strike free trade deals around the world; rather, it is to maintain high standards and provide additional financial support to protect UK business. The public's vision of Brexit is of a highly regulated, interventionist state, rather than a low-tax, free-wheeling open market economy.

This means that, in order to secure public backing, supporters of a close relationship between the UK and the EU need to ensure that their proposed model allows for greater independence than EU membership; while, for their part, supporters of a distant relationship need to ensure that their proposed model guarantees high standards and protections.

Could there be a way forward that both secures greater sovereignty and new controls over immigration while retaining high standards and protecting the UK and the EU's trading relationship? IPPR has proposed a new model, the 'shared market', that would prioritise alignment with EU rules while giving the UK greater powers to diverge in future (Kibasi and Morris 2017). Under this model, the UK would stay fully aligned to EU single market rules – including employment, consumer and environmental standards – but would have the option to diverge over time. Any decision to diverge would be met with proportionate restrictions on EU market access. The UK would additionally seek a compromise position on the free movement of people, allowing more controls over EU immigration while continuing to respect the underlying principle of freedom of movement.

The UK and the EU would also remain in a comprehensive customs union, which would mean that the UK would be responsible for striking its own trade deals with third countries, but its trade agreements and wider external trade policy would mirror the EU's common commercial policy (at least with respect to goods). This model would therefore continue to align the UK and the EU's regulatory and trade policy, but it would give the UK the ability to diverge if it chose to do so.

It might be argued that this model would restrict the government's use of state aid – a key priority for the public, according to our survey. But recent analysis suggests that, while some have claimed that EU state aid rules prevent substantial economic reform, such as nationalisation or infrastructure spending, in practice, state aid rules provide considerable scope for an active industrial policy (Tarrant and Biondi 2017). It is therefore unlikely that a UK government would actively seek to diverge from EU state aid rules post-Brexit.

In this and our earlier briefing on public attitudes to Brexit, our polling has highlighted that, even if the UK wants the ability to diverge from the EU's regulations in future, this does not necessarily mean it wants to use this ability to diverge in practice. There is strong support for retaining high standards, even at the expense of trade deals abroad. This means that, regardless of the final Brexit deal, there is little public appetite for a rupture from the European economic and social model.

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ANNEX: FULL DETAILS OF QUESTIONNAIRE AND OUTPUTS

QUESTIONNAIRE

As Brexit takes place, the UK is now likely to face a set of choices over our future relationship with the EU.

We would like to show you a series of potential choices relating to the UK's future relationship with the EU. In each case, please choose which of the two outcomes you would prefer.

Trade and borders

1. The UK should have its own trade policy, so it can strike trade deals independently from the EU
2. There should be a soft border (i.e. no border checks) between Northern Ireland and the Republic of Ireland
3. Don't know

Movement of people and services

1. Control and restrict the levels of immigration from the EU coming to the UK
2. Ensure UK services (e.g. law firms, banks and mobile phone companies) can do business in the EU in the same way as they can now
3. Don't know

Food safety standards

1. The UK should lower food safety standards to get a trade deal with the US
2. The UK should maintain current food safety standards to protect public health
3. Don't know

Employment, consumer and environmental standards

1. Align with EU employment, consumer and environmental standards to get a far-reaching EU trade deal
2. Loosen UK employment, consumer and environmental standards to save costs for UK businesses
3. Don't know

Government support for UK businesses

1. Keep limits on government financial support to UK businesses to get a far-reaching EU trade deal
2. Allow the government to give more preferential financial support to UK businesses to protect particular industries
3. Don't know

SUMMARY RESULTS

TABLE A: SUMMARY RESULTS OF IPPR/OPINIUM SURVEY ON BREXIT TRADE-OFFS

	Outcome A	Don't know	Outcome B	
The UK should have its own trade policy, so it can strike trade deals independently from the EU	1156	291	556	There should be a soft border (i.e. no border checks) between Northern Ireland and the Republic of Ireland
	58%	15%	28%	
Control and restrict the levels of immigration from the EU coming to the UK	1010	227	767	Ensure UK services (e.g. law firms, banks and mobile phone companies) can do business in the EU in the same way as they can now
	50%	11%	38%	
The UK should lower food safety standards to get a trade deal with the US	165	206	1633	The UK should maintain current food safety standards to protect public health
	8%	10%	82%	
Align with EU employment, consumer and environmental standards to get a far-reaching EU trade deal	975	475	554	Loosen UK employment, consumer and environmental standards to save costs for UK businesses
	49%	24%	28%	
Keep limits on government financial support to UK businesses to get a far-reaching EU trade deal	514	433	1057	Allow the government to give more preferential financial support to UK businesses to protect particular industries
	26%	22%	53%	

Source: IPPR/Opinium Survey, 19–22 Jan 2018 (percentages do not always sum to 100 due to rounding)

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