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How will a no-deal Brexit impact the UK?

A report by the Office of Antony Hook MEP

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Objective

This report sets out to investigate the challenges the UK is predicted to face as a result of a no-deal Brexit.

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Foreword

This report has been prepared by the Office of Antony Hook MEP to investigate challenges which the UK is predicted to face as a result of leaving the European Union without a withdrawal agreement, a move commonly referred to as a no-deal Brexit.

EU membership has provided economic opportunity and social protection for people in the South East of England and the wider UK. A no-deal Brexit has consequences for economic and social foundations that the South East and rest of UK has benefitted from for decades. Using the most recently available literature and data, this report provides a focal point to help with the understanding of some of the challenges of no-deal.

This report will look at the impact of no-deal on the economy, the NHS, immigration, agriculture, fisheries, travel and on Northern Ireland before reaching a final summary.

Key findings

- The Office of Budget Responsibility (OBR) has said that a no-deal Brexit will likely plunge the UK economy into recession and will double public borrowing to £60bn¹.
- To date the UK has only negotiated 14 trade deals with other countries since March 2017 when Article 50 was activated. The EU has, in contrast, trade deal fully or partly in place with 83 countries/territories and additional deals in progress. These include important trading partners such as Japan, Canada and Singapore. A no-deal Brexit means the UK will no longer enjoy tariff free trade with the EU or these other countries and territories.
- According to the Government's own data, GDP per person is set to decrease by 8.1% over 15 years as a result of no-deal². By way of illustration of what this would mean, an 8.1% reduction last year in GDP per person by would have been a reduction of £2,848.94 to £32,323.16. This is significantly poorer than other European countries. Germany's GDP per person in 2018 was £40,292.80 and France was £33,960.04³
- As a result of tariffs placed on agricultural products, meat prices are set to rise by 7.3% and all other food by 3.7%⁴.

¹ Office for Budget Responsibility. "Fiscal risks report", July 2019.
https://obr.uk/docs/dlm_uploads/Fiscalrisksreport2019.pdf

² HM Government. "EU Exit: Long-term economic analysis", November 2018.
https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/760484/28_November_EU_Exit_-_Long-term_economic_analysis_1_.pdf

³ The World Bank. "GDP per capita (current US\$)". <https://data.worldbank.org/indicator/ny.gdp.pcap.cd>

⁴ Catherine Barnard et al., "Cost of No Deal Revisited", *The UK in a Changing Europe*, 3rd September 2018.
<https://ukandeu.ac.uk/research-papers/cost-of-no-deal-revisited/>

- The NHS will be put under greater pressure as the immigration status of 5.2% of NHS staff will be uncertain⁵ as well as access to medical supplies from the EU.

1.

How will no-deal impact the economy in the short-term?

- 1.1. A no-deal Brexit on 31st October will undoubtedly destabilise the UK economy and no-deal Brexit increases the risk of the UK entering an immediate recession. According to the Office of Budget Responsibility (OBR), no-deal will bring a £30 billion hole in public finances (more than doubling the need for public borrowing compared to Brexit with a deal). Public borrowing will reach around £60 billion if the UK leaves without a deal⁶.
- 1.2. This cost will be transferred to ordinary families with rising levels of inflation and borrowing and little prospect of pay increases. Certain employers will face a short-term staffing shortage with an end of free movement. This means a significant shortage of staff in vital sectors such as healthcare and agriculture.
- 1.3. Further weakness in economic growth will in part be caused by no-deal planning and build-up of stock before Brexit. This build up, which would not be needed if a no-deal Brexit was ruled out, will mean that cash is not available to fund investment and growth. Building up stock in anticipating of shortages carries a real cost. Senior European economist Azad Zangana told the Financial Times: "whether the UK enjoys an orderly Brexit with a deal or not, the inventory build-up will eventually need to be run down, which suggests further weakness in economic growth"⁷.
- 1.4. A no-deal will also significantly reduce business confidence and consumer spending in the UK. Businesses would be hit by rising prices resulting from a further fall in the

⁵ Catherine Barnard et al., (2018). "Cost of No Deal Revisited", *The UK in a Changing Europe*, 3rd September 2018. <https://ukandeu.ac.uk/research-papers/cost-of-no-deal-revisited/>

⁶ Office for Budget Responsibility. "Fiscal risks report", July 2019. https://obr.uk/docs/dlm_uploads/Fiscalrisksreport2019.pdf

⁷ Chris Giles & Valentina Romei. "Is the UK on the brink of recession?" *Financial Times*, 10th July 2019. <https://www.ft.com/content/4bb4e658-a2f6-11e9-a282-2df48f366f7d>

pound's value and imports from the EU would be more expensive⁸.

2.

How will no-deal impact the economy in the long-term?

- 2.1. Various government departments and reputable external organisations have conducted exercises on the longer-term impacts of a no-deal Brexit. Under a no-deal Brexit, the UK will trade with the EU under WTO terms as a third country outside the single market.
- 2.2. Brexiteers have argued that the loss in free trade from the EU can be mitigated with free trade deals with third-countries such as the USA. A UK-US trade deal is yet to be negotiated and given the normal timescales on forming trade deals it looks unlikely anything will be in place for the 31st October Brexit deadline. A UK-US trade deal would have to be ratified by the US Congress, not simply signed by President Trump and statements by members of Congress have underlined that this would not be quick nor guaranteed to happen at all. The length of time that Congress has taken to approve other US trade deals is usually a period of years not months.
- 2.3. As of August 2019, the UK had only managed to negotiate 14 free trade deals with other countries⁹. These require ratification in accordance with the constitutional

⁸ Thomas Sampson, "Higher inflation, lower wages and decreasing output: Brexit is starting to negatively affect the UK economy", *LSE Brexit Blog*, 10th July 2018. <https://blogs.lse.ac.uk/brexit/2018/07/10/higher-inflation-lower-wages-and-decreasing-output-brexit-is-starting-to-negatively-affect-the-uk-economy/>

⁹ Department for International Trade & The Rt Hon Liam Fox MP. "UK and Chile sign continuity agreement", 30th January 2019. <https://www.gov.uk/government/news/uk-and-chile-sign-continuity-agreement>

Department for International Trade & George Hollingbery. "UK signs Eastern and Southern Africa trade continuity agreement", 31st January 2019. <https://www.gov.uk/government/news/uk-signs-eastern-and-southern-africa-trade-continuity-agreement>

Department for International Trade, George Hollingbery & George Eustice MP. "UK and Faroe Islands sign trade continuity agreement", 1st February 2019. <https://www.gov.uk/government/news/uk-and-faroe-islands-sign-trade-continuity-agreement>

Department for International Trade & The Rt Hon Liam Fox MP. "UK and Switzerland sign trade continuity agreement", 11th February 2019. <https://www.gov.uk/government/news/uk-and-switzerland-sign-trade-continuity-agreement>

Department for International Trade. "UK and Palestinian Authority sign trade continuity agreement", 18th February 2019. <https://www.gov.uk/government/news/uk-and-palestinian-authority-sign-trade-continuity-agreement>

Department for International Trade & The Rt Hon Liam Fox MP. "UK and Israel sign trade continuity agreement", 18th February 2019. <https://www.gov.uk/government/news/uk-and-israel-sign-trade-continuity-agreement>

Department for International Trade. "UK-Switzerland-Liechtenstein Trade Agreement", 28th February 2019. <https://www.gov.uk/government/collections/uk-switzerland-liechtenstein-trade-agreement>

Department for International Trade. "UK and Pacific Islands sign trade continuity agreement". 14th March 2019. <https://www.gov.uk/government/news/uk-and-pacific-islands-sign-trade-continuity-agreement>

Department for International Trade & George Hollingbery. "UK signs trade continuity agreement with Caribbean countries", 22nd March 2019. <https://www.gov.uk/government/news/uk-signs-trade-continuity-agreement-with-caribbean-countries>

procedures of the signatory countries, which as with the USA, may be complex. None of these 14 were with the UK's top trading partners including the EU, USA or China. In comparison, the EU has trade deals with 83 countries/territories around the globe (see Appendices 2 and 3) and ongoing negotiations with other countries.

- 2.4. According to the Government's own analysis from HM Treasury, GDP per person (the average amount earned by an individual) will fall by 8.1% over 15 years¹⁰. This - 8.1% projection considered both the positive and negative impacts of Brexit and concluded that overall a no-deal exit would be negative for the UK economy. Data from the World Bank shows the UK's GDP per person was US\$42,491.4 (£35,491.4)¹¹ By way of illustration In 2018 an 8.1% reduction would have reduced GDP per person to £32,323.16, representing a significant drop in standard of living. This is lower than in other European states with a similar population size and economy to the UK. Germany's GDP per person in 2018 £40,292.80 and France was £33,960.04¹².

3.

How will the NHS be affected and vital medical supplies?

- 3.1. No-deal will cause the delay of access to medical supplies used in treatment. This is due to the extended delays that are expected at the UK's major ports. The EU is an important source of certain medical supplies as the UK imports 37 million packs of medicine every month from the EU¹³. For example, some vital medical supplies such as human insulin are not produced in the UK and are imported from the EU¹⁴. The falling value of the pound of course makes imported supplies more expensive.

Department for International Trade. "UK, Norway and Iceland sign trade continuity agreement", 2nd April 2019.

<https://www.gov.uk/government/news/uk-norway-and-iceland-sign-trade-continuity-agreement>

Department for International Trade & George Hollingbery. "UK signs trade continuity agreement with Colombia, Ecuador and Peru", 15th May 2019. <https://www.gov.uk/government/news/uk-signs-trade-continuity-agreement-with-colombia-ecuador-and-peru>

Foreign & Commonwealth Office. "UK and Central America sign continuity agreement", 18th July 2019.

<https://www.gov.uk/government/news/uk-and-central-america-sign-continuity-agreement>

Department for International Trade & The Rt Hon Elizabeth Truss MP. "UK and Korea to sign trade continuity deal to ensure businesses are ready to trade post-Brexit", 21st August 2019. <https://www.gov.uk/government/news/uk-and-korea-to-sign-trade-continuity-deal-to-ensure-businesses-are-ready-to-trade-post-brexit>

¹⁰ HM Government. "EU Exit: Long-term economic analysis", November 2018.

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/760484/28_November_EU_Exit_-_Long-term_economic_analysis_1_.pdf

¹¹ The World Bank. "GDP per capita (current US\$)". <https://data.worldbank.org/indicator/ny.gdp.pcap.cd>

¹² The World Bank. "GDP per capita (current US\$)". <https://data.worldbank.org/indicator/ny.gdp.pcap.cd>

¹³ Francesco Guarascio, "No-deal Brexit could deepen Europe's shortage of medicines", *Reuters*, August 12 2019. <https://uk.reuters.com/article/uk-britain-eu-medicines/no-deal-brexit-could-deepen-europes-shortage-of-medicines-experts-idUKKCN1V20FQ>

¹⁴ Catherine Barnard, et al. "Cost of No Deal Revisited", *The UK in a Changing Europe*, 3rd September 2018.

<https://ukandeu.ac.uk/research-papers/cost-of-no-deal-revisited/>

- 3.2. Medicine shortages are likely to be a real issue. On 29 August, twelve organisations representing health professionals including the BMA and RCN signed a joint statement warning that a no-deal Brexit could “devastate the NHS”.¹⁵ Their statement notes that “many medicines including life-saving agents for cancer diagnosis and therapy, cannot be stockpiled and for those that can, stockpiles could run out.”
- 3.3. A departure from the EU with no-deal will mean the UK will need to authorise hundreds of medicines currently authorised under EU legislation and licensing. This will be a lengthy process and may mean that some medicines may not be available until they have been approved by UK authorities. The European Medicines Agency (EMA) which enables drugs to be given market access across the EU, supervises and conducts clinical-trials on medicines. This ensures that strict health and safety standards are implemented for pharmaceutical products. A no-deal Brexit means that the UK will lose access to the EMA for future supervisory and clinical-trial tests. This could lead to tighter supplies and higher costs and medicines.¹⁶ An inability to import medicines from the EU may mean the NHS cannot obtain cheaper generic medicines and will need to fall back on more expensive branded versions.
- 3.4. Medicines quality controlled in an EU member state can be sold and distributed throughout the EU. It is likely that for easily understandable reasons that manufacturers will move some operations from the UK to maintain their access to the EU market.
- 3.5. In July 2019 the Brexit Select Committee heard evidence from Martin Sawyer, executive director of the Healthcare Distribution Association who said that in a no-deal scenario, “we would expect medicine shortages and a lot of price rises for the NHS pretty quickly and some shortages in some constituencies for sure.” Mr Sawyer also warned that the UK would be at greater risk from counterfeit medicines as we would be unplugged from sophisticated EU systems that detect and eliminate fakes.¹⁷
- 3.6. The NHS relies heavily on a foreign workforce in hospitals, GP surgeries and other frontline provision of healthcare. 5.6% of the NHS workforce in England are EU

¹⁵ TUC, “No-deal Brexit could ‘devastate the NHS’, health union leaders warn”, August 29 2019.

<https://www.tuc.org.uk/news/no-deal-brexite-could-devastate-nhs-health-union-leaders-warn>

¹⁶ Francesco Guarascio, “No-deal Brexit could deepen Europe’s shortage of medicines”, *Reuters*, August 12 2019.

¹⁷ Lisa O’Carroll, “Vital medicine supplies at risk if UK crashes out of EU, MPs warned”, *The Guardian*, 19th June 2019. <https://www.theguardian.com/politics/2019/jun/19/vital-medicine-supplies-risk-no-deal-brexite-mps-warned-pharmaceutical-industry>

nationals¹⁸. Between October 2016 and September 2017, 4067 EU nurses and midwives left the Nursing and Midwifery Council register¹⁹. There are other evidence in numerous articles of EU staff leaving the NHS since the 2016 referendum in anticipation of Brexit and changes to their immigration status.

4.

How will no-deal change immigration policy?

- 4.1. No-deal Brexit will stop freedom of movement between the UK and EU. This means UK citizens will automatically lose the right to live, work and study in the EU. In August 2019, newly appointed Home Secretary Priti Patel announced that the government would abolish free movement after the 31st October 2019²⁰, albeit the legality of doing so immediately has been doubted.
- 4.2. Data from the House of Commons library shows that 3.6 million EU nationals live in the UK²¹. Many of these people work in vital sectors such as the NHS, schools, social care, construction and agriculture. Their status would be insecure after a no-deal and many would face, or expect to face, the prospect of having to leave the UK. The fall in the pound's value also makes working in the UK less attractive to EU citizens.
- 4.3. According to 2017 estimates from the United Nations (UN), around 1.3 million people born in the UK live in EU²². The last UK-wide census conducted in 2011, the Office of National Statistics (ONS) found that 900,000 UK citizens were permanent residents in the EU²³. EU law provides that any EU citizen can apply for permanent residence after living in another member state for five years²⁴. The data from ONS also shows the top destinations for British migrants in the EU. Spain hosts the largest group of UK citizens living in the EU with 309,000. France is ranked second

¹⁸ Catherine Barnard et al. "Cost of No Deal Revisited", *The UK in a Changing Europe*, 3rd September 2018. <https://ukandeu.ac.uk/research-papers/cost-of-no-deal-revisited/>

¹⁹ Nursing and Midwifery Council, "The NMC register", 30th September 2017.

<https://www.nmc.org.uk/globalassets/sitedocuments/other-publications/the-nmc-register-30-september-2017.pdf>

²⁰ Nick Duffy, "Priti Patel planning to 'end freedom of movement rights' on 31 October", *iNews*, 18th August 2019.

<https://inews.co.uk/news/brexit/priti-patel-planning-to-end-freedom-of-movement-rights-on-31-october/>

²¹ Georgina Sturge. "Briefing Paper: Number CBP06077", *House of Commons Library*, 3rd June 2019.

²² United Nations, "International migrant stock: The 2017 revision", 2017.

<https://www.un.org/en/development/desa/population/migration/data/estimates2/estimates17.asp>

²³ Office for National Statistics, "What information is there on British migrants living in Europe?", 27th January 2017.

<https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/internationalmigration/articles/whatinformationisthereonbritishmigrantslivingineurope/jan2017#number-of-british-citizens-living-in-europe-in-2011-by-age>

²⁴ "Permanent residence (>5 years) for EU nationals", European Union, last modified 24th January 2019.

https://europa.eu/youreurope/citizens/residence/documents-formalities/eu-nationals-permanent-residence/index_en.htm

with 157,000 and Ireland third with 112,000²⁵.

- 4.4. Under EU law, it is the responsibility of national governments on how they implement the legal status of non-EU citizens into domestic law. At present, member states have made little progress on determining the legal status of UK nationals in the EU in the event of no-deal.
- 4.5. The top three destinations for UK citizens in the EU are Spain, France and Ireland. At present, none of these have enacted any legislation about the rights of UK nationals after no-deal. Ireland will remain the only EU member to be able to guarantee the rights because of special bilateral arrangements with the UK²⁶.
- 4.6. In the event of no-deal, UK nationals will no longer be EU citizens and will become third-country nationals. The principle of free movement would no longer apply to British citizens. UK nationals living in the EU would need to apply for residence status and this process varies between member states²⁷. A significant number may decide to return to the UK and because of their age-group would present an additional pull on NHS and other public service resources.

5.

How will no-deal impact British farms and food supply?

- 5.1. Under World Trade Organisation (WTO) a no-deal Brexit will mean tariffs will be imposed on UK farming exports to the EU. The UK beef industry for example could face collapse with an 84% tariff imposed on any British beef export. Additional tariffs include: 48% on lamb, 37% on poultry, 30% on pork and 53% on wheat²⁸.
- 5.2. With the reintroduction of customs checks at the UK-EU border, the import and export of agricultural products will slowdown and disrupt the supply chain. Disruption will directly affect the consumer with availability of food supplies reduced and prices increased. It is expected that a no-deal Brexit will cause meat

²⁵ Office for National Statistics, “What information is there on British migrants living in Europe?”, 27th January 2017. <https://www.ons.gov.uk/peoplepopulationandcommunity/populationandmigration/internationalmigration/articles/whatinformationisthereonbritishmigrantslivingineurope/jan2017#number-of-british-citizens-living-in-europe-in-2011-by-age>

²⁶ Georgina Wright, “British citizens in Europe after Brexit”, *Institute for Government*, 10th July 2019. <https://www.instituteforgovernment.org.uk/explainers/british-citizens-europe-after-brexit>

²⁷ European Commission, “The rights of UK nationals living in the EU in the event of no deal”, March 2019. https://ec.europa.eu/info/sites/info/files/factsheet_2_uk_citizens_en_final_0.pdf

²⁸ World Trade Organisation. “World Tariff Profiles 2018”, https://www.wto.org/english/res_e/booksp_e/tariff_profiles18_e.pdf

prices in the UK to rise by 7.3% and other foodstuff by 3.7%²⁹, on top of inflation caused by other economic factors.

- 5.3. Some Brexiteers have argued that the UK shouldn't place tariffs on any agricultural imports. Doing this will be hugely damaging to domestic producers who will find it hard to compete with cheaper imports from non-EU countries with lower production costs while our exports to the EU do suffer tariffs
- 5.4. No-deal will also see the UK cut off from the European Food Safety Authority (EFSA). EFSA ensures that any EU food health concerns can be quickly managed and notified. EFSA examines emerging issues in food safety across the EU³⁰
- 5.5. A no-deal Brexit also means the UK leaves the Common Agricultural Policy (CAP). CAP supports farmers across the EU by providing funding support for their work and protecting them from external competition. In 2018, British farmers received a total of £3.5bn from the EU via the CAP³¹. With a no-deal Brexit, this funding would be stopped. It is difficult to see how the UK government could replace the CAP funding in the light of economic damage that will be caused by a no-deal exit. Combined with extreme tariffs, some British farmers will be driven out of business.

6.

How will no-deal impact the UK fishing industry?

- 6.1. A no-deal Brexit means the UK will automatically leave the Common Fisheries Policy (CFP). Brexiteers argue that this will be an opportunity for British fishermen to have complete control of UK waters by leaving the CFP. A no-deal Brexit, however, would be hugely damaging for the UK fishing industry.
- 6.2. No-deal will mean the imposition of tariffs on UK seafood exports to the EU. The UK's biggest export market for seafood is France with 96,501 tonnes exported in 2016³². The UK shellfish sector, which relies heavily on the European market, is expected to become particularly vulnerable as a result of no-deal. The shellfish industry is dependent on live exports and customs checks at the UK-EU border, which are mandated by EU law and not a matter of discretion, will inevitably impact quality and the attractiveness of the product in European markets.

²⁹ Catherine Barnard et al., "Cost of No Deal Revisited", *The UK in a Changing Europe*, 3rd September 2018. <https://ukandeu.ac.uk/research-papers/cost-of-no-deal-revisited/>

³⁰ "How we work", European Food Safety Authority. <http://www.efsa.europa.eu/en/about/howwework>

³¹ Catherine Barnard et al., "Cost of No Deal Revisited", *The UK in a Changing Europe*, 3rd September 2018. <https://ukandeu.ac.uk/research-papers/cost-of-no-deal-revisited/>

³² Catherine Barnard et al., "Cost of No Deal Revisited", *The UK in a Changing Europe*, 3rd September 2018. <https://ukandeu.ac.uk/research-papers/cost-of-no-deal-revisited/>

- 6.3. The notion that the UK outside the EU could radically lift restrictions on catch sizes is fanciful. To do so would be to ignore the weight of scientific opinion about the catch restrictions that are needed in the long-term to maintain a sustainable fish stock.

7.

Will no-deal effect travel between the UK and EU?

- 7.1. Travel between the UK and EU will be harder and more restrictive because of no-deal Brexit. At EU borders, UK nationals will no longer be entitled to use the fast EU/EEA/CH passport lanes. Additionally, UK nationals will face additional checks as border agents will be expected to ask questions about money, travel plans and insurance. This will mean it will take longer than now for UK nationals to cross EU borders.
- 7.2. The European Commission has proposed that UK nationals will be allowed visa-free travel for 90 days in a 180-day period in a no deal scenario. The Commission's proposal has been approved by the Council and European Parliament³³ but is contingent on the UK government reciprocating for EU citizens. UK nationals currently enjoy no restrictions to travel within the EU.
- 7.3. The EU covers healthcare of EU citizens away from their home state via the European Health Insurance Card (EHIC) which allows citizens to access state-funded healthcare in the EU. A no-deal means that UK nationals will be no longer eligible to access state-funded healthcare in EU member states.
- 7.4. There is also a possibility that UK drivers may need an international driving permit in some EU member states. The European Commission has stated that UK drivers will need to check with the authorities of the EU member in which they intend to travel regarding the rules for third-country drivers³⁴.
- 7.5. EU rules provide that mobile phone companies cannot charge roaming fees in the EU. This means that an EU citizen will not be charged more for using their mobile phone in another member state. However, being outside the EU, UK mobile phone

³³ European Council, "Visa free travel after Brexit: Council and European Parliament reach agreement", 3rd April 2019. <https://www.consilium.europa.eu/en/press/press-releases/2019/04/03/visa-free-travel-after-brexit-council-presidency-and-european-parliament-reach-provisional-agreement/>

³⁴ European Commission, "Travelling between the UK and the EU in the event of no deal", March 2019. https://ec.europa.eu/info/sites/info/files/factsheet_1_travel_en_final.pdf

companies will not be bound to EU roaming rules. This means that companies may reapply expensive surcharges to UK customers using roaming services for calls and data access on their mobile phone in the EU³⁵.

8.

Will no-deal impact the status of Northern Ireland and the border with the Republic of Ireland?

- 8.1. A no-deal is a real risk to peace and security in Northern Ireland.
- 8.2. No-deal will harden the Irish border with the installation of cameras, for example, as a part of customs infrastructure. As a result of the re-emergence of a hard-border in Ireland, there is concern that this may prompt activity by organised crime and attacks on the border or state institutions from dissident paramilitaries and a return to the period known as ‘the Troubles’ in Northern Ireland.
- 8.3. The troubles in Northern Ireland caused unprecedented violence around the UK throughout the 1970s-1990s. In July 1982 two IRA bombs killed 11 and wounded 50 in London’s royal parks. In 1984 Prime Minister Margaret Thatcher narrowly escaped a bomb at the Grand Hotel in Brighton which killed 11 and in 1989 11 were killed and 22 wounded after a bomb at the Royal Marines Music School in Deal, Kent.³⁶ There were many more acts of violence than can be listed here.
- 8.4. The Belfast Agreement, commonly known as the ‘Good Friday Agreement’ of 1998 secured peace in Northern Ireland after decades of violence. Parts of the agreement were signed in the context of shared EU membership between the UK and Republic of Ireland³⁷. In the event of a no-deal, certain terms of the Good Friday Agreement will no longer work because of the commitment of both states to work in an EU context.
- 8.5. The Belfast Agreement was intended to allow people in Northern Ireland to live easy cross-border lives. Many people live on one side of the Irish border and work on the other. SMEs have cross-border customers. Friends and family networks cross-borders. These cross-border relationships have been built on the UK and

³⁵ European Commission, “Travelling between the UK and the EU in the event of no deal”, March 2019.

https://ec.europa.eu/info/sites/info/files/factsheet_1_travel_en_final.pdf

³⁶ “Timeline – Worst IRA bomb attacks on mainland Britain”, *Reuters*, 16th May 2011. <https://uk.reuters.com/article/uk-britain-security-bombings/timeline-worst-ira-bomb-attacks-on-mainland-britain-idUKTRE74F31Q20110516#targetText=February%201974%20%2D%20Coach%20carrying%20soldiers,and%20wounds%20more%20than%202000>.

³⁷ Northern Ireland Office. “The Belfast Agreement”, 10th April 1998. <https://www.gov.uk/government/publications/the-belfast-agreement>

Ireland both being in the EU single market and customs union and therefore not requiring a hard border. Leaving the single market and customs union obviously undermines that.

- 8.6. As a part of the UK that voted Remain in the 2016 referendum, there is little appetite in Northern Ireland for no-deal and this is strengthening calls to break up the United Kingdom and reunite Ireland. Only 15% of people in Northern Ireland support no-deal. This is combined with an increasing number of calls for a united Ireland. In a poll conducted for the BBC and YouGov by LucidTalk (LT), 42.1% said they would like a united Ireland³⁸.
- 8.7. A no-deal also risks energy and healthcare provisions in Northern Ireland. In terms of energy, Northern Ireland relies heavily on energy contracts with the Republic of Ireland. Having an open border is vital for healthcare in Northern Ireland. In the border towns, ambulances from both jurisdictions respond to emergency calls and any delays at the border could potentially cost lives.

³⁸ LucidTalk. “May 2018- Northern Ireland Tracker Poll LucidTalk Tracker Poll (Northern Ireland – NI) Results Report”, 6th June 2018. http://news.bbc.co.uk/1/shared/bsp/hi/pdfs/080618_bbcfullreport.pdf

Summary

This research report on the challenges of a no-deal Brexit has aimed to consolidate key findings into one accessible document.

Leading experts agree that a no-deal will damage the UK in many ways. It is likely, that no-deal will cause an economic recession in the UK with higher inflation and higher public borrowing. The immigration status of UK nationals in the EU will immediately change in the event of no-deal. Many would lose the right to live, work or study in the EU and would face either being forced to return to the UK or apply for third-country national status with fewer rights than previously enjoyed.

Food supply is also likely to be delayed leading to increased prices and empty supermarket shelves. The tariffs on British agricultural exports will undoubtedly put some farmers out of business. This will be shared by the UK fishing industry, who will see their catches being damaged by delays at the border as well as costly WTO tariffs.

UK nationals who travel to the EU face restrictions. Not only will a UK national be only permitted to visit the EU for a 90-day period, UK passport holders will face longer queues at EU border points. When in the EU, UK nationals will no longer be entitled to access state-healthcare, may face red-tape with driving licences and may not benefit from EU call and data roaming rules.

There is a real risk that no-deal will cause political turmoil in Northern Ireland. With the re-introduction of a harder border, this could easily motivate dissident paramilitaries to return to arms. Only 15% of people in Northern Ireland support no-deal as it will impact trade, relations and free movement with the Republic of Ireland.

The NHS will face impacts such as delayed vital medical supplies and restrictions on free movement that will see vital staff members' immigration status changing. The NHS relies heavily on the EU institutions such as the EMA to ensure access to the latest developments in vital medicines that ultimately save lives.

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Appendix 1:

Types of EU trade agreement.

There are three main types of agreement³⁹:

1. Customs Union
 - Eliminate customs duties in bilateral trade
 - Establish a joint customs tariff for foreign importers.

2. Association Agreements, Stabilisation Agreements, (Deep and Comprehensive) Free Trade Agreements and Economic Partnership Agreements
 - Remove or reduce customs tariffs in bilateral trade.

3. Partnership and Cooperation Agreements
 - Provide a general framework for bilateral economic relations
 - Leave customs tariffs as they are.

³⁹ “Negotiations and agreements”, European Commission, last modified July 25 2019, https://ec.europa.eu/trade/policy/countries-and-regions/negotiations-and-agreements/#_being-negotiated

Appendix 2:

Countries or territories that the EU has trade agreements in place⁴⁰:

Country (Region)	Agreement	Status
Albania (Western Balkans)	Stabilisation and Association Agreement	In force since 2009
Algeria	Association Agreement	In force since 01/09/2005
Andorra	Customs Union	In force since 01/01/1991
Armenia	Partnership and Cooperation Agreement	In force since 09/09/1999
Bosnia and Herzegovina (Western Balkans)	Stabilisation and Association Agreement	In force since 01/06/2015
Botswana (SADC)	Economic Partnership Agreement	In force since 05/02/2018
Chile	Association Agreement and Additional Protocol	In force since 01/03/2005
Egypt	Association Agreement	In force since 01/06/2004
Eswatini (SADC)	Economic Partnership Agreement	In force since 05/02/2018
Faroe Islands	Agreement	In force 01/01/1997
Georgia	Association Agreement	In force 01/07/2016
Iceland	Economic Area Agreement	In force since 1994
Israel	Association Agreement	In force since 01/06/2000
Japan	Economic Partnership Agreement	In force since 01/02/2019
Jordan	Association Agreement	In force since 01/05/2002
Kosovo	Stabilisation and Association Agreement	In force since 01/04/2016
Lebanon	Association Agreement	In force since 01/04/2006
Liechtenstein	Economic Area Agreement	In force since 1995
Lesotho (SADC)	Economic Partnership Agreement	In force since 05/02/2018
Mexico	Global Agreement	In force since 01/10/2000
Moldova	Association Agreement	In force since 01/07/2016
Montenegro (Western Balkans)	Stabilisation and Association Agreement	In force since 01/05/2010
Morocco	Association Agreement	In force since 01/03/2000
Mozambique (SADC)	Economic Partnership Agreement	In force since 05/02/2018
Namibia (SADC)	Economic Partnership Agreement	In force since 05/02/2018

⁴⁰ Negotiations and agreements”, European Commission, last modified July 25 2019, https://ec.europa.eu/trade/policy/countries-and-regions/negotiations-and-agreements/#_being-negotiated

North Macedonia (Western Balkans)	Stabilisation and Association Agreement	In force since 01/04/2004
Norway	Economic Area Agreement	In force since 1994
Pakistan	Co-operation agreement	In force since 29/04/2004
Palestinian Authority	Interim Association Agreement	In force since 01/07/1997
San Marino	Customs Union	In force since 01/04/2002
Serbia (Western Balkans)	Stabilisation and Association Agreement	In force since 01/09/2013
South Africa	Economic Partnership Agreement	In force since 05/02/2018
South Korea	Free Trade Agreement	In force since 01/07/2016
Sri-Lanka	Co-operation and Partnership Agreement	In force since 01/04/1995
Switzerland	Agreement	In force since 01/01/1973
Syria	Co-operation Agreement	In force since 01/07/1977
Tunisia	Association Agreement	In force since 01/03/1998
Turkey	Customs Union	In force since 31/12/1995

Appendix 3:

Countries or territories that the EU has trade agreements partly in place⁴¹:

These countries and regions that have part (but not all) or their agreements in place with the EU. The agreement is fully applied when all parties have ratified the agreement.

Country (Region)	Agreement	Status
Antigua and Barbuda (CARIFORUM)	Economic Partnership Agreement	Provisionally applied since 2008
Armenia	Updated Partnership and Cooperation Agreement	Provisionally applied since 06/2018
Bahamas (CARIFORUM)	Economic Partnership Agreement	Provisionally applied since 2008
Barbados (CARIFORUM)	Economic Partnership Agreement	Provisionally applied since 2008
Belize	Economic Partnership Agreement	Provisionally applied since 2008
Botswana	Economic Partnership Agreement	Provisionally applied since 10/10/2016
Cameroon (Central Africa)	Interim Economic Partnership Agreement	Provisionally applied since 2014
Canada	Comprehensive Economic and Trade Agreement (CETA)	Signed 30 October 2016, provisionally applied since 21/09/2017
Colombia (with Ecuador and Peru)	Trade Agreement	Signed 26/07/2012, provisionally applied since August 2013
Côte d'Ivoire (West Africa)	Stepping stone Economic Partnership Agreement	Signed EPA, stepping stone provisionally applied since 03/09/2016
Comoros (ESA)	Interim Economic Partnership Agreement	Signed 08/2009, provisionally applied since 7 February 2019
Costa Rica (Central America)	Association Agreement with a strong trade component	Signed 29/06/2012, provisionally applied since 2013
Cuba	Political Dialogue and Cooperation Agreement	Provisionally applied since 1/11/2017
Dominica (CARIFORUM)	Economic Partnership Agreement	Provisionally applied since 2008
Dominican Republic (CARIFORUM)	Economic Partnership Agreement	Provisionally applied since 2008

⁴¹ Negotiations and agreements”, European Commission, last modified July 25 2019, https://ec.europa.eu/trade/policy/countries-and-regions/negotiations-and-agreements/#_being-negotiated

Ecuador (with Colombia and Peru)	Trade Agreement	Signed 26/07/2012, provisionally applied since 2013
El Salvador (Central America)	Association Agreement with a strong trade component	Signed 29/06/2012, provisionally applied since 2013
Ethiopia	Economic Partnership Agreement	Signed 08/2009, not yet provisionally applied
Fiji (with Papua New Guinea)	Interim Partnership Agreement	Ratified by Papua New Guinea in May 2011
Ghana (West Africa)	Stepping stone Economic Partnership Agreement	Signed EPA, stepping stone provisionally applied since 03/09/2016
Grenada (CARIFORUM)	Economic Partnership Agreement	Provisionally applied since 2008
Guatemala (Central America)	Association Agreement with a strong trade component	Signed 29/06/2012, provisionally applied since 2013
Guyana (CARIFORUM)	Economic Partnership Agreement	Provisionally applied since 2008
Honduras (Central America)	Association Agreement with a strong trade component	Signed 29/06/2012, provisionally applied since 2013
Iraq	Partnership and Cooperation Agreement	Signed May 2012, provisionally applied since August 2012
Jamaica (CARIFORUM)	Economic Partnership Agreement	Provisionally applied since 2008
Kazakhstan	Enhanced Partnership and Cooperation Agreement	Provisionally applied since 01/05/2016
Papua New Guinea (with Fiji)	Interim Partnership Agreement	Ratified by Papua New Guinea in May 2011
Namibia (SADC)	Economic Partnership Agreement	Provisionally applied since 10/10/2016
Nicaragua (Central America)	Association Agreement with a strong trade component	Signed 29/06/2012, provisionally applied since 2013
Panama (Central America)	Association Agreement with a strong trade component	Signed 29/06/2012, provisionally applied since 2013
Madagascar (ESA)	Economic Partnership Agreement	Signed 08/2009, provisionally applied since May 2012
Mauritius (ESA)	Economic Partnership Agreement	Signed 08/2009, provisionally applied since May 2012

Peru (with Colombia and Ecuador)	Trade Agreement	Signed 26/07/2012, provisionally applied since 2013
Samoa (Pacific)	Economic Partnership Agreement	Provisionally applied since December 2018
Seychelles (ESA)	Economic Partnership Agreement	Signed 08/2009, provisionally applied since May 2012
South Africa	Economic Partnership Agreement	Provisionally applied since 10/10/2016
St Kitts and Nevis (CARIFORUM)	Economic Partnership Agreement	Provisionally applied since 2008
St Lucia (CARIFORUM)	Economic Partnership Agreement	Provisionally applied since 2008
St Vincent and the Grenadines (CARIFORUM)	Economic Partnership Agreement	Provisionally applied since 2008
Suriname (CARIFORUM)	Economic Partnership Agreement	Provisionally applied since 2008
Trinidad and Tobago (CARIFORUM)	Economic Partnership Agreement	Provisionally applied since 2008
Ukraine	Deep and Comprehensive Free Trade Agreement & Association Agreement	Signed 29/05/2014, provisionally applied since 01/01/2016
Zambia (ESA)	Economic Partnership Agreement	Signed 08/2009, not provisionally applied yet
Zimbabwe (ESA)	Economic Partnership Agreement	Signed 08/2009, provisionally applied since 2012

Appendix 4:

Countries or territories that the EU has agreements pending:

In some circumstances trade negotiations with a trade partner have been concluded but have not either been signed or ratified yet. This means that although the negotiations have finished, no part of the agreement is in place yet⁴².

Country (Region)	Agreement	Status
Benin (West Africa)	Economic Partnership Agreement	Signed, awaiting signature from all parties
Burkina Faso (West Africa)	Economic Partnership Agreement	Signed, awaiting signature from all parties
Burundi (EAC)	Economic Partnership Agreement	Has not signed or ratified agreement
Cabo Verde (West Africa)	Economic Partnership Agreement	Signed, awaiting signature from all parties
Djibouti (ESA)	Economic Partnership Agreement	Signed 08/2009, not yet provisionally applied
Eritrea (ESA)	Economic Partnership Agreement	Signed 08/2009, not yet provisionally applied
Ethiopia (ESA)	Economic Partnership Agreement	Signed 08/2009, not yet provisionally applied
Gambia (West Africa)	Economic Partnership Agreement	Signed, awaiting signature from all parties
Guinea (West Africa)	Economic Partnership Agreement	Signed, awaiting signature from all parties
Guinea-Bissau (West Africa)	Economic Partnership Agreement	Signed, awaiting signature from all parties
Haiti (CARIFORUM)	Economic Partnership Agreement	Haitian ratification pending
Kenya (EAC)	Economic Partnership Agreement	Signed and ratified, provisional application when all EAC countries sign and ratify
Liberia (West Africa)	Economic Partnership Agreement	Signed, awaiting signature from all parties
Mali (West Africa)	Economic Partnership Agreement	Signed, awaiting signature from all parties
Niger (West Africa)	Economic Partnership Agreement	Signed, awaiting signature from all parties
Nigeria (West Africa)	Economic Partnership Agreement	Signed, awaiting signature from all parties

⁴² Negotiations and agreements”, European Commission, last modified July 25 2019, https://ec.europa.eu/trade/policy/countries-and-regions/negotiations-and-agreements/#_being-negotiated

Rwanda (EAC)	Economic Partnership Agreement	Signed and ratified, provisional application when all EAC countries sign and ratify
Senegal (West Africa)	Economic Partnership Agreement	Signed, awaiting signature from all parties
Sierra Leone (West Africa)	Economic Partnership Agreement	Signed, awaiting signature from all parties
Singapore	Free Trade Agreement	Subject to CJEU opinion 2/15, awaiting signature
Tanzania (EAC)	Economic Partnership Agreement	Has not signed or ratified agreement
Togo (West Africa)	Economic Partnership Agreement	Signed, awaiting signature from all parties
Mauritania (West Africa)	Economic Partnership Agreement	Signed, awaiting signature from all parties
Uganda (EAC)	Economic Partnership Agreement	Has not signed or ratified agreement
Vietnam	Free Trade Agreement	Final text agreed July 2018, awaiting signature and conclusion

Appendix 5:

Countries or territories that the EU is negotiating trade agreements⁴³:

Country (Region)	Agreement	Status
Argentina (Mercosur)	Mercosur Association Agreement	Negotiations resumed May 2010
Australia	Australia Agreement	Negotiations launched in June 2018
Bahrain (GCC)	Free Trade Agreement	Negotiations started 1990, suspended since 2008
Brazil (Mercosur)	Mercosur Association Agreement	Negotiations resumed May 2010
China	EU-China investment agreement	Negotiations started 21/11/2013
India	Free Trade Agreement	Negotiations started 2007, last round in 2013
Indonesia	Free Trade Agreement	Negotiations started 01/09/2016
Kuwait (GCC)	Free Trade Agreement	Negotiations started in 1990, suspended since 2008
Malaysia	Free Trade Agreement	Negotiations started October 2010, paused since April 2012
Myanmar	Investment protection agreement	Negotiations started 2015
New Zealand	New Zealand Agreement	Negotiations launched in June 2018
Oman (GCC)	Free Trade Agreement	Negotiations started 1990, suspended since 2008
Paraguay (Mercosur)	Mercosur Association Agreement	Negotiations resumed May 2010
Philippines	Free Trade Agreement	Negotiations started 01/12/2015
Qatar (GCC)	Free Trade Agreement	Negotiations started 1990, suspended since 2008
Saudi Arabia (GCC)	Free Trade Agreement	Negotiations started 1990, suspended since 2008
Thailand	Free Trade Agreement	Negotiations started 01/03/2013, no negotiations scheduled since 2014

⁴³ Negotiations and agreements”, European Commission, last modified July 25 2019, https://ec.europa.eu/trade/policy/countries-and-regions/negotiations-and-agreements/#_being-negotiated

United Arab Emirates (GCC)	Free Trade Agreement	Negotiations started 1990, suspended since 2008
United States	Transatlantic Trade and Investment Partnership	Negotiations started 2013, paused until further notice 2016
Uruguay (Mercosur)	Mercosur Association Agreement	Negotiations resumed May 2010
Venezuela	Mercosur Association Agreement	Negotiations resumed May 2010

Appendix 6:

UK negotiated trade deals⁴⁴.

Country (Region)	Signed
Chile	30 January 2019
Eastern and Southern Africa (Madagascar, Mauritius, Seychelles and Zimbabwe)	31 January 2019
Faroe Islands	1 February 2019
Switzerland	11 February 2019
Palestinian Authority	18 February 2019
Israel	18 February 2019
Liechtenstein	28 February 2019
Pacific Islands (Fiji and Papua New Guinea)	14 March 2019
Caribbean countries (CARIFORUM)	22 March 2019
Norway	2 April 2019
Iceland	2 April 2019
Andean countries (Colombia, Ecuador and Peru)	15 May 2019
Central America (Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua and Panama)	18 July 2019

⁴⁴Department for International Trade & The Rt Hon Liam Fox MP. “UK and Chile sign continuity agreement”, 30th January 2019. <https://www.gov.uk/government/news/uk-and-chile-sign-continuity-agreement>

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