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School of European Political Economy

# **A tale of four balls and one grenade**

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After the 2016 Brexit referendum, the UK and the EU have gone through more than 3 years of negotiations that were sometimes very difficult but had always seen the EU having the upper hand. The reason is simple: we knew what we wanted, while Britain's weak government tried desperately to make sense of a divided country who had stumbled without a plan in one of the most important decisions in five centuries. "Take back control" is a wonderful vote winning slogan, but it is not a policy. Now Brexit has happened and what lies ahead is different. When the EU discussed the Withdrawal Agreement and the divorce bill, it only had to stick to the red lines; all the burden was on the UK. We were strong and, contrary to what many people had hoped for in London, we were united. Now that we are preparing to discuss our future relations, although virtually everybody agrees that the UK will suffer from Brexit more than the EU, much is at stake for us as well. Furthermore, although the country remains divided, a brutal electoral system and the God sent gift of an unelectable opposition have awarded Boris Johnson one of the biggest majorities in several decades. He now has the privilege, denied to his predecessor, of being able to define a strategy with the certitude that it will be supported by Parliament. In so far as words matter, he has defined it and it's important for us to try and understand.

Seen from the moon (or the EU), Boris Johnson could look like a juggler who is busy keeping in the air four balls and one grenade. In this effort he is helped by a number of fantasies. The concept was clearly expressed in a major speech at the Royal Naval College in Greenwich that with a characteristic lack of proportion he described as England's Sistine Chapel. In conformity with the venue, the speech was full of Imperial nostalgia and maybe more suitable for a President of the Oxford Union than for a Prime Minister, but Boris is master at spreading wit where he lacks arguments.

The first ball is called "global Britain". The idea is that the UK could become the center of a world wide web of liberal countries devoted to free trade. In its more extreme form, it takes the image of a "Singapore on the Thames": a dynamic, open, deregulated and highly competitive economy. The fantasy is that the Commonwealth still exists, that one can go back to the Victorian splendor when the UK was the center of the biggest Empire in history and the engine of the industrial revolution.

The sub fantasy of course is the liberal and deregulated nature of Singapore, but this in Borisland is a minor detail. The sad reality is that the world is becoming more and not less nationalist. There is not much visible appetite for a new “promoter of free trade”; particularly not one the size of the UK. Johnson will discover soon that some of those countries are now more prosperous than Britain and will negotiate from a position of strength; just wait until India asks for a special treatment of immigration in exchange for trade concessions. Also, they have not really spent the last forty years waiting for this moment and are equally keen to negotiate a free trade agreement with the EU; the wish is reciprocal and some of them already have. For virtually all of them the EU is a more important partner than the UK.

The second ball is called “special relations”. The idea is that, relieved of the burden of being constrained by the Franco-German axis and the Brussels bureaucracy, the UK could give special relations with the US a new life in the political as well as in the economic sense. After all, isn’t the UK the second military power within NATO while 20% of its exports already go to the US? The fantasy is not to understand that special relations with the US could be anything but equal. They have indeed always been friendly and benevolent, but they are not relations between equals, nor have they ever been starting from Roosevelt all the way to Obama. Bretton Woods, Suez and the refusal to share nuclear secrets are just a few useful reminders. Is there a reason to think that it could be any different under an “America first” President? Trump could be tempted to grant favors to the UK in order to weaken the EU, but there are limits. The relations will be special only insofar as the UK accepts to play second fiddle. The first tests are looming: Iran, 5G, food standards, climate change, maybe even the NHS. In addition, also the EU is busy trying to negotiate with the US. The point is not to understand one’s place in the queue, but if it is at all possible to engage in meaningful negotiations with the unpredictable Donald. Maybe Trump has more sympathy for Johnson than he has for Macron or Merkel, but the citizens of Britain seem to loath him at least as much as do their cousins on the Continent. Like it or not, Britain has grown more “European” in many important ways: from what to do with Iran, to climate change to food standards. It will not be easy to convince the public to accommodate the American version of the new special relations. It is quite possible that Johnson will do what others, from Canada, to Mexico, to China have done in the last two years: find some fudge that will allow Trump to claim victory and keep him calm at least until the next outburst. The EU too is desperate to try and do the same. How to cope with “the Donald” is a problem that we have in common.

The third ball is called “one nation”. The last election has produced an 80 seats majority for the Conservative party. The result has been made possible by breaking the “red wall” of traditional Labour seats in the Midlands and the North. Johnson’s political priority must be to consolidate those gains and make the majority permanent. One can speculate on why this happened: whether traditional Labour voters were attracted by the idea of “getting Brexit done”, or by the obvious shortcomings of the Labour party. To consolidate the gains an effective policy will be necessary, and

it will be an expensive one. The need to retain the consensus of traditional Labour areas, is an element that will contribute to keep Britain “European” when it comes to social and environmental legislation. Real money will be needed for investments in infrastructure and public services in areas that have suffered from decades of decline. Thanks to past austerity, the UK has some fiscal room to increase its debt but there are limits. Such a change of policy will also have to be sold to the traditional conservative voters in London and the South East. They have accepted the inevitability of Brexit but are not keen to pay a high price for it. Also, they will not be enthusiastic to have to choose between more taxes on the wealthy middle class (i.e. themselves) and more public deficit; more probably with the prospect of having to face both. They may not be ready to share the American Republican party’s complacency for an increasing public debt. After all the dollar’s “exorbitant privilege” allows the US to do things that would be denied to “global Britain”.

## **Now the biggest ball**

Its name is “Take back control”. There is an element that makes the forthcoming negotiations between the UK and the EU unique. In all the other cases the purpose is to eliminate or reduce existing obstacles. The parties have to decide to which extent and under which conditions trade can become “freer”. In this case exactly the opposite is taking place. The UK is already part of the European single market, the biggest and most integrated in the world; about half of its exports go to the rest of the EU. Trade is not only free of duties, restrictions and border controls, but the high degree of harmonization of rules and standards has radically modified the supply chains across the EU. In many sectors, automotive is an important example, in order to function effectively industry needs a seamless flow of parts and components often from different countries. This level of integration can of course be unraveled, but it would take time and imply considerable cost. Due to the difference in size, the UK is clearly more affected by the problem than the EU. Since the UK and the EU are now sovereign entities, the main object of the negotiation will be to decide how to cope with the possibility that rules that are now common could start to diverge. In other terms, instead of aiming to make trade freer, we shall deal with the prospect that it could become less so. When we negotiate a normal trade pact, the worse that can happen is that things will remain as they are. In this case we are negotiating in order to minimize damages that are inevitable. From the British point of view, the fantasy is that full sovereignty can be reconciled with keeping trade seamless. The problem is that the campaign for Brexit had promised exactly that: “keep our cake and eat it”.

Both the EU and the UK have published their negotiating platforms. They have in common to be about forty pages long, but for the rest they couldn’t be further apart. Both sides declare that they wish to keep the existing situation free of duties and quantitative restrictions. However, the EU attached to the proposal a condition that is categorically rejected by the UK. The point of contention can be summarized in three words, (level playing field) and one question: what happens if rules that

are now common diverge in the future, as is quite possible since we deal with two sovereign entities? The answer of the UK is simple: that would be the natural consequence of having a free trade area, as the EU knows well, for instance with its agreement with Canada. The EU replies that the UK situation is unique, given its size, geographical proximity and the existing level of integration of our economies; no other country is in the same position. The new pact should therefore include provisions to ensure a level playing field; other free trade provisions should be conditional to this. One reason to question the logic of the British position is the “Political Declaration” signed by the present government and the EU together with and referred to by the Withdrawal Agreement. This Political Declaration is a mildly watered-down version of document already negotiated by Theresa May that describes in broad terms the future relations between the UK and the EU. The Declaration is not legally binding but was explicitly meant to be the guidance for the future negotiations. When it comes to the issue of level playing field, the document is rather clear:

***To that end, the Parties should uphold the common high standards applicable in the Union and the United Kingdom at the end of the transition period in the areas of state aid, competition, social and employment standards, environment, climate change, and relevant tax matters. The Parties should in particular maintain a robust and comprehensive framework for competition and state aid control that prevents undue distortion of trade and competition; commit to the principles of good governance in the area of taxation and to the curbing of harmful tax practices; and maintain environmental, social and employment standards at the current high levels provided by the existing common standards. In so doing, they should rely on appropriate and relevant Union and international standards, and include appropriate mechanisms to ensure effective implementation domestically, enforcement and dispute settlement as part of the future relationship. The future relationship should also promote adherence to and effective implementation of relevant internationally agreed principles and rules in these domains, including the Paris Agreement.***

Not surprisingly, the negotiating mandate of the EU wants to translate those political objectives into legal commitments. Concerning the nature of the regulatory “alignment” that is expected, the EU has refrained from asking explicitly that it should not be limited to existing rules that are already part of UK law, but be extended to their future evolution. Taken to extremes, that EU position would have required the UK to enter an agreement similar to that of Norway who is committed to adopt all new European rules if it wants to maintain access to the single market. The EU admits that “alignment” cannot mean the same thing in all the different fields mentioned in the declaration. Nobody on the EU side, even the usually radical French, pretend that the rules should be identical. Here comes the concept of “equivalence”, that means that different rules can be deemed to produce similar results. Equivalence is a useful tool for international negotiations, but it implies clear procedures to establish if and when it can be applied. The text proposes that there should be an institutional system

entrusted with the task of discussing, agreeing and enforcing the extent of the commitment. Problems should be discussed in a joint committee and disagreements submitted to an arbitration procedure. The two legal systems would remain sovereign, but interpretations of EU law should follow the opinion of the European Court of Justice. The implicit consequence is that, if after all this a regulatory divergence is confirmed, barriers to trade or some other form of compensation would intervene. Taking into account the unequal size of the two partners, it is easy to see that the EU proposal, while formally avoiding placing the UK in a situation of rule taker, would in practice come quite close to it.

The different fields mentioned in the Political Declaration don't have the same characteristics. For instance, the labour standards for which the EU may require alignment don't really amount to much given the modest level of European harmonization in this field. State aids could be trickier; Johnson pretends that the UK spends in state aids less than many EU countries including Germany but forgets that this is typically an area where the assessment of possible distortions of competition must be made on a case by case basis. Food standards and some industrial products like chemicals could also be difficult because the UK will have to choose between domestic and international pressure. It is true that in some cases the EU has stretched the precautionary principle that is at the basis of its legislation at (and possibly beyond) the limits of scientific consensus. Hormone fed beef is an obvious example. The UK will therefore find itself under strong pressure from the US and others to diverge. On the other hand, the British public seems to appreciate the high level of protection as much as the continental public does. It is doubtful that it would welcome chlorinated chicken from the US.

The concept of "dynamic alignment" is particularly important in two areas that will be the object of a lot of attention from the EU institutions. The first goes under the heading of "digital revolution" and it includes things like data protection and storage, artificial intelligence and facial recognition. Data protection also has implications for future security and judicial cooperation. Intellectual property is an area where there is already some EU legislation also adopted by the UK, but it needs to be updated. With the exception of the protection of personal data (the GDPR directive), the digital world is still largely virgin as far as EU rules are concerned but is rapidly becoming a priority. If the UK and the EU must be able to cooperate, rules will have to be at least convergent. Even more important is the field of environment and particularly everything related to climate change. The British government continues to declare adherence to the Paris agreement and portrays itself as one of the leading actors against climate change. It is therefore not unreasonable for the EU to expect a high degree of alignment. Finally, there is taxation that is maybe the biggest worry of Europeans who fear "Singapore on the Thames". Indeed, some of the rhetoric that occasionally comes out of London justifies those fears. However, there are limits to what the EU can expect given the absence of fiscal harmonization and the fact that some of its members already have a level of corporate taxation that is lower than the UK.

What I have discussed until now concerns primarily trade in goods. Services are a special case and they seldom figure prominently in trade agreements. Nevertheless, they are of paramount importance in our case and any ambitious agreement will have to cover them extensively. For the purpose of this analysis it is useful to focus on financial services. They are a case where equivalence will play a crucial role and the stakes are high for both sides. London is Europe's main financial center. As a consequence of Brexit, some activities will inevitably leave London for places like Paris, Frankfurt or Amsterdam. However, the present role of London in the European context is not the result of a political decision that can easily be replaced by another. It is the product of centuries of experience and expertise; nobody really believes that it can be replaced without incurring in huge costs for the European economy. It would be in nobody's interest if at the end of the day Europe's financial markets became more costly, less efficient and less liquid. Does this give the UK a strong card in the negotiation? Only up to a point. If it is true that Europe needs London as its financial hub, on the other hand and whatever the rhetoric of "global Britain", the competitive position of London compared to places like New York, Shanghai or Hong Kong is also linked to the fact that it is the biggest financial center close to Europe's time zone. The logical conclusion should therefore be that both sides have an interest in negotiating a good agreement on equivalence. It may not be so simple. While the UK will want to adapt the rules of the City to the development of technology and to an evolving international environment, some of the reasons why the EU wants to legislate on its banks or capital markets are related to the stability of the euro. The EU (or rather the eurozone), has to cope with the unique situation of being the only large monetary area whose main financial center is outside its jurisdiction. This anomaly explains why the two sides could have different, although not necessarily divergent, motivations for the rules that they wish to apply. The conditions under which equivalence is granted, a sovereign decision that the EU wants to preserve, as well as the sectors to which it may apply, will have to be carefully defined also in order to guarantee a sufficient level of stability that is an understandable requirement from the British side.

While the level playing field will be the main issue in the negotiation, there are other important things that it will be too long to examine in detail. Both sides want to develop close cooperation in the field of foreign policy and defense. Most of it will happen within NATO. However, if and when the EU develops CFSP (its foreign and security policy), it may be a common interest to associate the UK at least to some programs; we are after all talking about the main European military power together with France. Much will also depend on the future development of British foreign policy in areas such as Iran and the Middle East where the UK is at present closer to the European than to the US position. Internal security is also an obvious candidate for cooperation. Without being part of Schengen, the UK participates in some of the existing European framework that deal with police and judicial cooperation as well as the fight against terrorism. How far they can be maintained or even strengthened will have to be debated. One inevitable casualty of Brexit is that the UK, since it ceases to be a member state subject to the European Court of Justice, cannot any longer be a member of the European Arrest Warrant; this will have to be replaced by some sort of facilitated

extradition, but the outcome will be far slower and less efficient. It should be noted that the EU explicitly links cooperation in the field of security to the continued membership by the UK of the European Convention of Human Rights (ECHR). There is also the European research or programs like Galileo and Erasmus, activities where the UK is at present one of the main actors and beneficiaries. They are all fields where a common interest is clear and in an ideal world they should be easy to deal with. However, as we have seen the world is far from ideal; much will therefore depend on the willingness to discuss the main issues in a constructive spirit.

One of the most important issues in the whole Brexit debate has centered on the free movement of people. The Withdrawal Agreement has settled the problem at least in principle for those EU citizens that already reside in the UK. We shall see how this is applied in practice. Given the creeping xenophobia that exists at different levels of the British Home Office, one can expect some individual cases of mistreatment: probably few in numbers, but enough to make the front pages of the newspapers and contribute to sour relations. For the future, the UK is reviewing its immigration policy and it would be unrealistic to expect a special treatment for EU citizens. The future will tell if and how they can make it work. The EU will and must of course insist that the new rules don't discriminate between its member states. On the other hand, it should be in the mutual interest to agree to continue the present level of mutual recognition of academic titles and professional qualifications.

There is one other issue that merits a special mention: fisheries. Its economic importance for the European, and the British economy, is marginal but it is politically (which means electorally) extremely sensitive for the UK as well as for at eight EU members that have an Atlantic or a Nord Sea coast. The definition of the problem is relatively simple: the British (or rather their waters) have the fish, we have the market. Fishery is a local, socially sensitive and fragile occupation in many countries. The additional complication is that, due to past overfishing, fish has become scarce. Before the EU managed to arrive to the present situation of more or less peaceful access to each other's waters, some will remember less than peaceful confrontations at sea and nights of painful negotiations in Brussels. The issue is so complicated that some observers venture to predict that the final phase of the negotiation, if there is one at all, will be financial services vs. fish. After all they both float; don't they?

## **The grenade**

When a juggler fails to keep his balls in the air, the worse that can happen is that they fall and splash. If it is a grenade, it can blow in the face of the juggler and not only his. In our case the name of the grenade is Ireland. The huge potential impact of Brexit on the border between Ulster and the Republic of Ireland, indeed on the very existence of the Good Friday agreement that put an end to a

long civil war, was grossly underestimated by those who promoted the Brexit referendum. It continued to be underestimated by those in charge of negotiating the Withdrawal Agreement until they discovered that it was a priority for the EU that made the maintenance of an open border in Ireland one of our red lines. Much to the surprise of many in London, we pledged to stand by one of our smallest members and we didn't give up. They failed to understand that to sacrifice the interest of a small member in order to facilitate the relations with a big country that was about to leave, would have amounted to a fatal blow to the credibility of the EU as a whole. As a result, the Irish problem that has acquired the arcane label of "backstop", became the last intractable stumbling block on the road to the ratification of the Withdrawal Agreement by a fractured British Parliament and a government that depended on the votes of the Northern Ireland's Unionist party. To summarize in few words what could sound like an esoteric problem, there are only two ways to avoid a border across the island of Ireland after Brexit. Either by permanently trapping the entire UK in a custom's union with the EU, or by doing the same only with Ulster; a solution that implies some form of checks on goods that go from Britain to Northern Ireland. In practice a sort of border across the Irish sea. Theresa May had chosen the first option and failed to get it approved.

Johnson the juggler went for the second option and got it approved by pretending that there would not be checks or other types of obstacles between Britain and Northern Ireland. The problem is that the text of the agreement is absolutely clear and, although efforts can be made to minimize their effects, some checks on goods transiting across the Irish sea will be inevitable. There are various possible outcomes. One is that Johnson does with the Ulster unionists what De Gaulle did with the French colonists in Algeria: betray them. The second is that he refuses to abide by the agreement and some form of border between north and south becomes necessary. The third is that, with some help from Brussels and also from Dublin a sort of fudge can be found. It is too soon to predict the most likely outcome. What is certain is that, given the past experience and even more so after the results of the recent elections in the Republic with the unexpected success of the nationalist party Sinn Fein, the problem will have to be handled with enormous care from all sides. Many other issues can go wrong at an economic or political cost. If the Irish grenade goes wrong, the cost could be much more serious.

## **Good luck the juggler**

At first sight, the EU mandate is written in rather radical terms. However, those more acquainted with the document's Eurojargon can detect a certain amount of flexibility. The UK too has made public its negotiating position. As far as the main issue - that of level playing field - is concerned, it can be summarized as follows. The UK confirms that it intends to follow closely the model of free trade agreements already concluded by the EU with third countries, particularly that with Canada. It also states its intention to maintain a "high level of regulation" in all the fields mentioned in the

Political Declaration but refuses categorically to translate it into enforceable commitments. Furthermore, while reaffirming that it will not want to extend the transitional period beyond the end of this year, it also sets the date of next June as the limit after which it may decide that an agreement with the EU is not possible on terms that it deems acceptable and will start preparations to exit purely on WTO terms. The UK therefore effectively dumps the Political with the intriguing argument that after its signature (less than a month!) it has been superseded by the Manifesto on the basis of which an election has been won. I don't think it is worth discussing here the impact of such an argument on the credibility of future commitments made by the UK. It is more important to note that this extremely radical position begs two types of questions.

The first concerns the timing. There is universal consensus that ten months are already an absurdly short period for a negotiation as complex as this one. To introduce a new June deadline is a deliberate provocation. One interpretation is that Johnson believes that, by putting pressure on us he can divide the EU and make us more disposed to abandon our red lines. It is not only something that we had already heard after the referendum but is also a tactic that had been applied in several occasions in the troubled past forty-five years of membership. Its logic was beautifully embodied in the unforgettable words of Sir Humphrey Appleby in a famous episode of "Yes, Minister": ***"Our purpose is and has always been to play the Germans against the French, the French against the Spaniards, the French and the Italians against the Germans and the German and the Italians against the French"***. Brilliant, but Sir Humphrey and the others like him miss the point that while the tactic may have worked in the past, it has failed systematically once the UK came inside. What some people in London fail to understand is that, although we do disagree on many issues, the probability that we could be divided on this one is close to zero. Important as it is, Brexit is not our problem number one. One of the results of the referendum has been to make even countries like Holland and Sweden, the traditional allies of the UK, less keen to compromise. Such tactic, even if it succeeded to stimulate internal tensions, could have the perverse effect to make the European position more and not less rigid.

Another suspicion is that by forcing an unrealistic time frame, Johnson's real objective is to come out with no agreement at all and be able to put the blame on the unreasonable requests of the EU. It would rally British patriotism, burn the bridges and the ships, oblige a reluctant country to face the challenge and the glory of Global Britain. Absurd? Probably, but not necessarily so for somebody who pleases himself to be able to quote Homer in the original. After all the same tactic had been tried last year; it failed only because a different House of Commons was unwilling to abide. It is interesting to note that, while declaring his willingness to exit on WTO terms, Johnson has refused to provide any estimates of the economic consequence of such a move.

The second question concerns the reason why the UK confirms that the level of regulation will remain very high but refuses bluntly to enter any commitment about it. A willingness at least to

discuss the issue in detail could have allowed to explore the flexibilities that are included in the EU mandate. The refusal seems to suggest that, at least in this phase, the ideological purity of the Brexit message takes precedence on everything else. This impression is compounded by the message that the UK could even be willing to backtrack on the commitment included in the Withdrawal Agreement on the Irish problem, with all the implication for the “grenade” that I have described earlier.

It could be argued that we are facing not one but four British governments that correspond to the balls mentioned in the title of this paper. There is the “global Britain” one, the “special relations” one, the “one nation” one and finally the “get Brexit done” one. In terms of rhetoric one can pretend that they have convergent objectives, but the reality is that they are to a large extent incompatible. When Johnson is obliged to leave the kingdom of words where he is master for the kingdom of facts, it will become apparent that “global Britain” and “special relations” don’t amount to much. On the other hand, as it is the case for all serious countries, at the end of the day the negotiating position of the UK is bound to be determined primarily by domestic considerations. The “one nation” government in particular will want to focus on what is necessary to consolidate the political gains that it has made in the Midlands and the North. This will have not only significant financial implications but will also condition the government’s priorities in fields like taxation, social legislation, food standards and particularly the concrete implementation of the pledge to keep faith to the Paris objectives on climate change. The concrete domestic priorities will unfold gradually over the next few months, but it would not be surprising to discover that Britain has become more “European” than it is prepared to admit and is not really attracted by the model of a “Singapore on the Thames”. It is therefore reasonable to expect that it will want to stay “aligned” in some important cases, while it will decide to diverge in others. It therefore appears that the confrontation doesn’t concern so much the content of the rules, but the principle of the establishment of an institutional mechanism that could constrain the absolute freedom (sovereignty) of the UK.

What should the EU make of all this? In politics words often have ambiguous meaning and a short life; even more so in international relations. When you come to Borisland, ambiguity becomes a form of art and the life span of words can be measured in days if not hours; the fate of the Political Declaration is a good example. Theoretically, there are two scenarios. The first is that after few weeks used to exchange rhetorical salvos, the UK quietly decides to taste the water of the flexibility offered by the EU mandate. Such an approach would be welcomed by the business community and would be compatible with many of the foreseeable domestic priorities. It would also have the additional advantage of improving the expectations for economic growth that are at present not brilliant due to the international environment made worse by the looming danger of a Covid 19 pandemic. This optimistic approach would probably not give us a fully negotiated agreement by the end of the year, but it would at least produce the skeleton of something that could be completed later. However, such a rational choice is highly unlikely. To abandon Brexit’s ideological purity would be interpreted

by many Brexiteers as “doing another May”. They would argue, not without reason, that the UK could be trapped in a diabolic spiral of gallic logic from which it would be impossible to escape. Nobody should dare to speculate on Johnson’s deep “convictions”, but it is certain that for many in the government there is a firm belief in the metaphysical value of sovereignty and the conviction that “global Britain” is not simply a dream. There is a sort of perverse logic in all this. The biggest rational indictment of Brexit is that available analysis conclusively suggests that all its variants, from very soft to very hard, will have a negative economic impact if compared to the present situation. If this is so, the only logical justification of Brexit is in the reappropriation of sovereignty that in turn can only be guaranteed by the most extreme version of it. This also explains why all the concrete warnings, like the need of at least fifty thousand new officials that will be needed only to deal with the paperwork at the border, are dismissed as technical details.

The alternative scenario is therefore sadly more likely to materialize. Johnson will stick to ideological purity, there will be no meaningful negotiation and the UK will definitely leave on WTO terms at the end of the year. There are possible variants. The break could be very nasty, leaving us all with a bloody blame game and other more practical intractable problems. It is more likely that at least some attempt would be made to find provisional solutions in order to avoid the biggest damages, for example in the field of aviation, exchange of data and financial services.

If this is the scenario that we are likely to face, the question arises: for how long ideology can trump reason? The answer depends on a set of sub questions. How long it will take for “global Britain” and “special relations” to appear for what they are: fantasies? How long will it take for the economic consequences of hard Brexit to become visible not only in the analysis of professional economists, but in people’s wallets and in the real economy? This is probably the most important question and it could take more time than some predict. There are other subsidiary questions. How long will it take for Johnson to consider that the support of the ideological hard Brexiteers around him has become a liability? Finally, how long will it take for a credible opposition to emerge from the ruins of the last elections?

They are all questions that it would be foolish for a foreigner to dare and speculate on. As it would be foolish to speculate on the even bigger question about the future unity of the nations that at present compose the UK. Whatever the answers, the instinct tells me that the time will be long. The UK is not embarking on a simple voyage. It will be obliged to reflect on its identity as nation and its place in the world. What is needed is a self-analysis that it has tried to avoid after the demise of the Empire. Having refused to do so could well be the main reason for the failure of its membership of the EU. We should therefore be patient and wait with an open door. Time could be long, but we can be confident that it is on our side. Or is it? This is a much more difficult question that requires a decision on what we want to be as a Union. One thing is certain: whatever the answer, it does not depend on Brexit.