UK IN A CHANGING EUROPE

INSIGHT

THE UK–EU SUMMIT: WHAT TO EXPECT AND WHAT COMES NEXT?



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HOW DID WE GET HERE?

On 20 November, the second UK-EU summit will take place in Brussels. This brief sets out the context ahead of it. What is up for discussion? What are the potential sticking points? What impacts could any new agreements have? And what happens next?

The first UK-EU summit, held in May last year, represented a major landmark of the Starmer government's ambition to 'reset' the EU relationship. After almost a decade in which the UK's sole focus had been on extricating itself from the EU, the two sides issued a post-summit communiqué – the 'Common Understanding' – announcing plans for a number of measures to deepen cooperation on trade, security and mobility.

On trade, a commitment was made to negotiate new agreements on 'SPS' (plant and animal health standards) and 'ETS' (carbon levy schemes for industrial goods), as well as to explore a deal on UK participation in the EU's internal electricity market (IEM). Those agreements would, if completed, remove much of the administrative friction which has hit trade in food, carbon-heavy goods and energy post-Brexit. Significantly, however, they would necessitate UK 'dynamic alignment' with EU law in those sectors, i.e. adhering to it now and as it evolves, with no meaningful say. The SPS and ETS deals have been subject to intensive negotiations while the IEM package remains at an earlier stage.

On defence, a new Security and Defence Partnership was agreed prior to the summit, launching strategic dialogues and consultation on a wide range of topics broadly connected to security (ranging from the war in Ukraine to global health). A commitment was also made to explore the UK's participation in the EU's €150bn 'Security Action for Europe' (SAFE) instrument for common defence borrowing. However, negotiations failed last November due to disagreement about the size of the UK's financial contribution.

On mobility, the two sides committed to work towards the UK's reassociation with the 'Erasmus+' educational exchange programme, and to negotiate a 'youth experience scheme' allowing young EU nationals to live in the UK for a defined period of time (and vice-versa). UK participation in Erasmus+ has been agreed (at a cost of £570m to the UK) for the year 2027/28, while talks on youth mobility – which have proven especially sensitive – are ongoing.

A second UK-EU summit, at which it was hoped that many of these agreements would be finalised, was initially set to take place on 22 July this year. It was postponed due to Keir Starmer's resignation as Prime Minister and rescheduled for the autumn.

Although only eighteen months have passed since the first summit, the second now takes place against a very different backdrop. In spring 2025, the Starmer government was at pains to show voters that it was trying to 'make Brexit work' rather than undo it, while simultaneously seeking to exploit its independence from the EU to both attract American investment in areas like technology and obtain preferential treatment from the Trump White House on tariffs. These priorities were reflected in the government's 'red lines' of no single market, customs union or free movement of people, which in turn allowed for only very limited re-integration into the EU's economic and security architecture under the Common Understanding.

In the intervening eighteen months, the US has proven itself an increasingly unreliable ally, the public's view of Brexit has turned yet more negative and British businesses face new challenges from a growing EU penchant for 'Made in Europe'-style industrial support schemes which explicitly exclude foreign companies. Perhaps most crucially, the UK has a new Prime Minister who is much more forthright in his criticism of the economic costs of Brexit. Andy Burnham told the Labour Party Conference in September that "I cannot say to you truthfully that where we are is good enough. Brexit has done more harm than good." He wants to look again at the "different options" for the UK-EU relationship and has made it clear that all options – including rejoining the EU – will be under consideration for after the next election.

This summit's agenda can thus be broken down into three pillars.

- First, the UK and EU will want to show that they are turning commitments into concrete action by announcing that some or all of the ambitions outlined in the Common Understanding have been achieved.

- Second, it is an opportunity to agree on a new package of measures to be taken forward to further enhance cooperation.

- Third, Burnham will likely use the opportunity to sound out the EU before he kicks off his national 'discussion' about the future relationship.

This leaves the Prime Minister in the curious position of trying to finalise the reset deals and agree a new package of measures to keep momentum going, while simultaneously arguing to the British public that what has been agreed is fundamentally unfit for purpose. Managing these various elements will prove tricky for both sides. The rest of this brief outlines the many tasks ahead.

PILLAR 1: DELIVERING THE COMMON UNDERSTANDING

ISSUES TO AGREE

SPS and ETS negotiations are all but complete, though we do not yet know the details. One key question is whether the UK has been permitted any exemptions from dynamic alignment with EU SPS rules – given that the Common Understanding allowed for 'a short list of limited exceptions' – and, if so, what those are (the UK government has raised genetic editing, novel foods and animal welfare as priorities). There are similar questions over the extent of dynamic alignment required to 'link' emissions trading schemes and whether the UK regime will have to cover all the same sectors as the EU's (both now and in the future). You can read a more detailed brief on the ETS talks here.

For both agreements, the two sides will have to agree on the precise scope of UK 'decision-shaping' powers. These are likely to resemble those of Switzerland, meaning the right to participate in early legislative consultation processes, but no voting rights. They will also have to agree on the size of the UK financial contribution to support the 'relevant costs associated' with administrating the regimes (the biggest element is likely to be support for the European Food Safety Authority's running costs), and a process for settling disputes in relation to the agreement. This will almost certainly include a role for the Court of Justice of the European Union as the ultimate authority on questions of the interpretation of the European Union law to which the UK is subject; as well as an 'exit clause' on managing the costs stemming from either side reneging on the agreement. It is still not clear whether the full legal texts of the agreements will be published at the summit.

The most significant obstacle to finalising the SPS and ETS deals is that the EU has long insisted that they are 'linked' to the youth mobility (or 'youth experience') scheme – its chief negotiating interest. In other words, the former two cannot be signed off without agreement on the lattermost.

Youth mobility has proven the most complex file in the 'reset' negotiations, with the UK pushing for a cap on overall participant numbers while the EU initially rejected any such limit. The latest reports suggest a potential compromise of somewhere between 75,000-100,000 participants a year. The EU has also asked for its nationals to be exempted from the NHS surcharge and (much higher) international university tuition fee rates. The UK is reportedly considering accepting the EU's demand on tuition fees (possibly even for those not participating in the youth mobility scheme) in exchange for concessions in other areas. Finally, agreement is needed on the age cap for participants, the duration of stays under the scheme (reportedly set to be three years), and whether UK nationals will have the right to work/live across all EU countries or just one. This is made more complicated by the fact that arrangements have to be negotiated with member states as well as the Commission.

It is not clear whether these disagreements will be resolved by the summit. Reporting suggests that the EU has proposed pushing back the deadline for finalising the youth mobility deal (namely the tuition fees element) by six months. Though this has been presented by EU officials as a "gift" to the UK, it is hard to imagine that Brussels would be willing to let the SPS and ETS agreements take effect unless and until youth mobility talks are concluded.

IMPLEMENTING THE AGREEMENTS

Indeed, while the UK and EU hope to announce that the SPS and ETS deals have been completed at the summit, they will not take immediate effect. Beyond the need for EU agreement, significant work remains to be done to make them operational. Not least, the UK must implement all necessary EU rules (likely to run to hundreds of pieces of legislation across the two files) and prepare businesses for the necessary adaptations.

The UK initially wanted the SPS deal operational by the end of 2027 but is now targeting early 2028. In March, the government published a list of 'legislation in scope' under the deal to encourage businesses to begin preparatory work. Equally, British exporters will not be exempted from the EU's carbon border (CBAM) tariffs until ETS linkage is operational (unless a temporary exemption is agreed for the implementation phase), adding a degree of time pressure. However, the EU may be reluctant to commit to any target dates, especially without final sign-off on youth mobility.

The key instrument for transposing EU law onto the UK statute book is the European Partnership Bill, which was proposed in the King's Speech in May and is set to be published shortly after the summit. This will tell us how the government's decision to 'dynamically align' with EU law will work in practice. If the government wants a swift process, the bill must give it sweeping powers to use secondary legislation to adopt EU law – with Parliament playing only a minimal role in scrutinising legislation, with little or no ability to block it.

Another question is whether Westminster will gain powers to implement EU legislation in Wales and Scotland, as well as England, in areas (like SPS and ETS) where legislative power is largely devolved. This would be the most efficient approach and would ensure that EU law is applied uniformly across the whole UK – minimising any risks of trade complications. It could also, however, be seen as a Westminster power-grab which undermines the UK's devolution settlement.

THE ECONOMIC IMPACT

Relative to mainstream assessments of the impact of Brexit, the economic benefits to be gained from the reset are likely to be small – probably a 0.3-0.7% rise in GDP in the long run. The government's own analysis, which only considers agreements on SPS and ETS, puts the potential gains at 0.3% by 2040. These small income gains reflect the fact that key traded sectors – manufactured goods, financial and business services, travel and transport – were not part of the negotiation. It is, however, larger than the gains from the free trade agreements the UK has signed with Australia, New Zealand, Pacific Rim countries and India which, according to government impact assessments, will each raise GDP by between 0.01% and 0.1%.

The SPS deal would substantially reduce border and regulatory checks on agriculture and food, which would raise trade volumes. But those sectors make up a small share of UK-EU trade, so the resulting gains – cheaper imports, more variety, and higher export earnings – will be small relative to the economy as a whole.

By linking emissions trading systems, companies will be able to trade allowances for emissions across the UK-EU border. These systems cap overall emissions from heavy industry. That cap falls each year. There is a market for allowances to emit one tonne of CO_2 under that cap, which plants then buy and

sell. Plants that reduce emissions faster can earn revenue from plants that do not, so they become more profitable and expand their market share. Linking the UK and EU markets will create a larger, more efficient market, because high-emissions plants in the UK can buy unused allowances from across the EU (and vice-versa). That will provide larger rewards for plants that can decarbonise their operations most cheaply. It will also make prices less volatile, making investments in decarbonisation more certain to pay off in the long run.

Linking the systems would also exempt each side from tariffs under their respective CBAMs. These mechanisms are intended to prevent heavy industry from migrating to countries that have lower carbon prices, or do not impose prices on emissions at all. They add a tariff to imports of high-emissions goods that is equivalent to the domestic carbon price. With linked emissions trading systems, carbon prices will be the same in both the EU and UK, so no tariffs will be applied. That will prevent UK-EU trade in high-emissions goods from deteriorating further.

The potential gains for the UK economy of the youth experience scheme depend entirely on its scope. But both elements of the scheme – re-establishing the ability of young people to live in and work in both the UK and EU, and to pay home university tuition fees – would be positive for UK GDP.

On the first, the data is very patchy on the number of UK adults under the age of 30 who moved to the EU when they had free movement rights. But, as far as we can tell, for every 25 young people from other member states who moved to the UK, one British person moved to the rest of the EU. That gap is likely to be considerably smaller now that wage and unemployment differences have shrunk across Europe. But it does suggest that a scheme would increase net immigration to the UK, with most people finding jobs and contributing to national income and tax revenues. The more restrictive the scheme is – whether through a cap on numbers, time limits, or making it difficult for people to move onto other visas after their time is up – the smaller the gains.

British universities are unhappy at the prospect of home tuition fees for EU students. Enrolment more than halved between 2018/19 and 2024/5 – a loss of about 80,000 – as EU students baulked at high international fees, with that loss more than offset by a rise in the number of students from other countries. However, international students (and visiting friends and family) consume goods and services in the UK, and those gains are almost as large as tuition fee income, according to London Economics. As a result, reducing tuition fees for EU students would see university income per-student fall, while income for the UK economy as a whole would increase.

PILLAR 2: A NEW PACKAGE

The purpose of the summit is not just to conclude existing talks, but to also set the agenda for cooperation thereafter. It is likely that a post-summit communiqué – perhaps the 'Common Understanding 2.0' – will outline a new set of proposals. However, because Andy Burnham remains, for now, committed to Keir Starmer's red lines of no single market, customs union or free movement of people, there are relatively few available options.

In addition, while the first summit was focused on fixing problems created by Brexit, the second might also address new issues which have emerged as challenges since the UK-EU Trade and Cooperation Agreement (TCA) was signed in 2020. The EU's new 'Made in Europe' agenda, and its implications for British industry's access to the EU market, is the chief UK concern here.

INTERNAL ELECTRICITY MARKET

UK participation in the EU internal electricity market (IEM) was one of the marquee announcements in the Common Understanding, but negotiations have not progressed as quickly as on the SPS and ETS files. The European Commission took longer to secure a negotiating mandate from member states – which, unlike those for SPS and ETS, asserts that the UK should contribute to wider EU 'cohesion' funding for regional economic development (rather than just supporting with relevant admin costs) as part of the agreement – and there are lots of technical complexities to resolve. The summit is an opportunity to update on the progress of talks and potentially set a target for their completion. UK participation in the IEM would improve the efficiency of electricity trading, which could save both sides hundreds of millions a year in administrative costs, and, more critically, would enable the deployment of shared next-generation offshore wind infrastructure in the North Sea, which could reduce the shared cost of the net zero transition by billions.

SECURITY & DEFENCE

One major unresolved item from the Common Understanding is the UK's participation in the EU's SAFE instrument for common defence borrowing. This, as mentioned earlier, fell apart over the question of the UK's financial contribution. The bulk of SAFE funds have now been disbursed, but the two sides may want to signal their willingness to work together more closely on defence matters.

One option would be UK participation in a new funding call issued by the European Commission in late October, for allocation of the remaining €20bn of SAFE funds for projects supporting defence readiness and Ukraine. The funds have to be allocated by June 2027, so the two sides would have to move quickly to agree on UK participation – and the level of the UK's financial contribution would again likely be an issue. Another option would be to provide a progress update on the Security and Defence Partnership, agreed ahead of the last summit, which allowed for strategic dialogue across many areas but was lacking in concrete calls to action. Commitments to more structured cooperation on topics like health or maritime security – or UK participation in missions (either civilian or military) under the EU Common Security and Defence Policy – could be means to demonstrate progress.

MIGRATION

The UK Prime Minister has expressed a wish to rejoin two EU policing databases, the Schengen Information System (SIS, which provides real-time security information on missing persons, goods and fugitives) and Eurodac (which stores biometric and identity data on asylum seekers). A significant obstacle, however, is that only three non-EU member states (Iceland, Norway and Switzerland) participate in both SIS and Eurodac, while another (Liechtenstein) is in Eurodac only; all have free movement of people with the EU and participate in the new EU Asylum Pact. The UK would have to make a significant offer to the EU to incentivise it to explore negotiations on this topic, which would also take some time to complete given it requires formal, treaty-based agreement.

ERASMUS+

The UK's participation in Erasmus+, which was envisioned in the Common Understanding, was agreed late last year, but only for 2027/28 (which is when the current EU budget cycle ends). This summit could thus be a moment for the two sides to announce their intention for the UK to participate in the next Erasmus cycle, running from 2028-34. Here, too, negotiations might not necessarily be straightforward – especially as the Commission has proposed a significant increase in funding for Erasmus under the next EU budget (currently under negotiation), implying a larger financial contribution from the UK.

ELECTRIC VEHICLE RULES-OF-ORIGIN

Under the terms of the TCA, from 1 January 2027, an increased proportion of electric vehicle (EV) batteries and components must originate from the UK or EU in order to qualify for tariff-free trade. These changes were designed to incentivise greater domestic production of EV components, but industry groups claim that most manufacturers will not be able to meet the new requirements and therefore face a 10% tariff on their exports between the UK and EU. Some environmental groups, however, argue that sufficient supplies are available and that abandoning the change would harm the credibility of EU rules and the wider 'Made in Europe' agenda.

The summit could be the moment for the UK and EU to announce whether to extend the current rules-of-origin grace period, and if so for how long. The latest reports suggest talks will begin properly after the summit, with a 'simple' one year extension and more complex two-year option (including offsetting measures) on the table. Implementing the extension would be a matter for the Partnership Council which oversees the TCA (headed by Hamish Falconer and Maros Šefčovič). The grace period was first set to expire at the end of 2023 (replaced by a second, more stringent set of interim rules up to the end of 2026), before the UK and EU decided to drop the change at the last minute due to similar industry concerns.

ECONOMIC SECURITY

A key British concern in the lead-up to the summit has been the EU's Industrial Accelerator Act (IAA). The legislation is intended to reduce economic dependence on China in particular. The IAA proposes that EU public procurement processes and certain subsidies (like tax breaks) should favour content 'Made in Europe' for certain 'strategic sectors'. While, in most areas, UK-made content is likely to count as European, one notable exception is the automotive sector. This omission has generated significant alarm on the part of both the UK car industry and the Prime Minister.

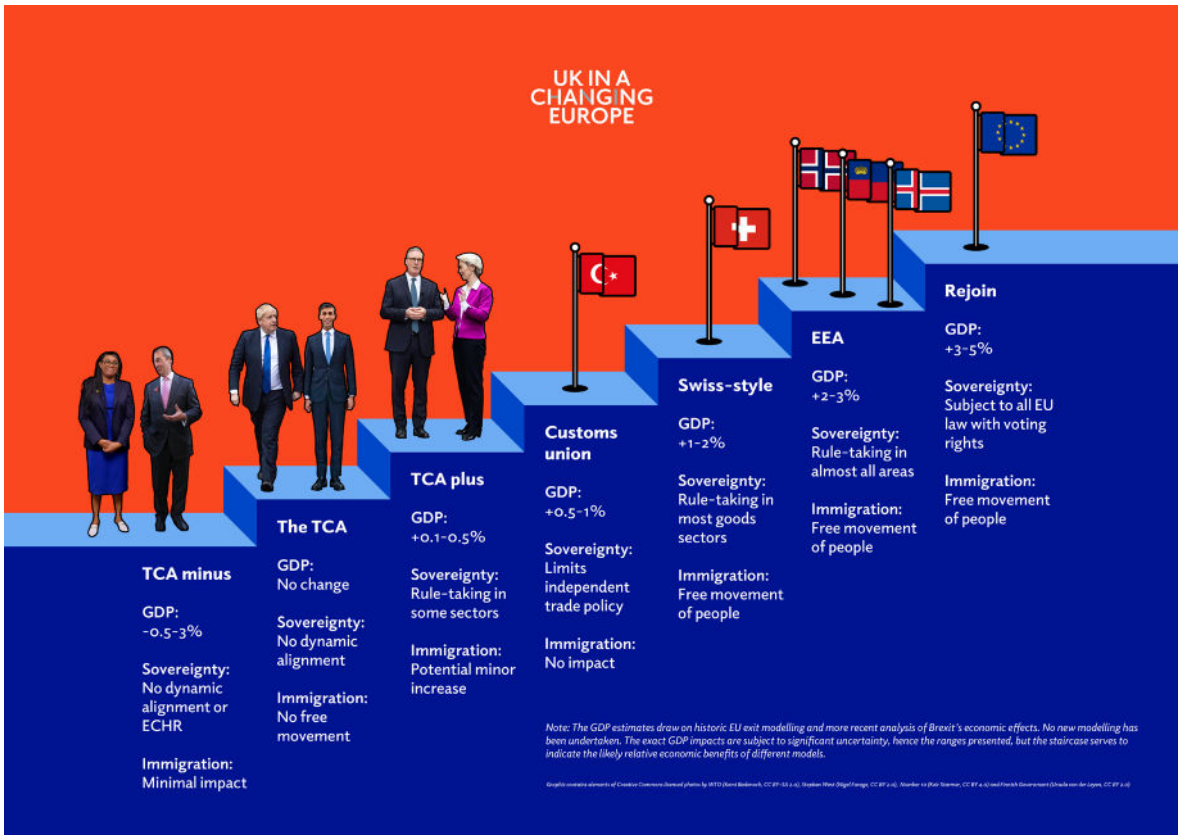
As so often when it comes to relations with the EU, this opens the prospect of issue linkage. Recent briefing suggest that the UK is ready to allow EU students to pay domestic tuition fees in exchange for full UK access to Made in Europe. However, because the IAA is still being negotiated within the EU, it is not within the European Commission's gift to guarantee this. It is therefore likely that any commitments in the post-summit communiqué would amount to pledges to avoid negative trade impacts in relevant sectors – via a new 'Trusted Partnership' focused on 'economic security' issues – rather than a cast-iron guarantee.

And trade-offs of course work both ways. The EU, for its part, is likely to ask for greater UK alignment with its economic security policies – ensuring it applies the same tariffs and other trade restrictions on foreign (especially Chinese) imports in sectors such as EVs. The UK government has previously expressed reluctance about matching the EU's much stronger restrictions on EVs, due to concerns about Chinese trade retaliation and harm to UK vehicle exports. To be clear, policy alignment would not be enshrined in the communiqué – it would be a matter for the UK and EU to discuss in future dialogues, meaning the Made in Europe issue and other economic security negotiations will rumble on for many months to come.

Harmonised policy could be managed through a formalised economic security forum or dialogue, covering not only EVs but also other areas such as steel (where the UK has suffered from a major tightening of EU import controls), critical raw materials and defence industrial goods. Such harmonisation would also, however, raise further questions about the utility of post-Brexit 'freedoms' and feed into the debates that are starting about the future development of UK-EU relations.

PILLAR 3: THE LONGER TERM

In his Labour Party Conference speech, Andy Burnham promised to "take the opportunity around the summit to lay out to you, to lay out to the country, what I believe the different options are for Britain's long-term relationship with our European partners." Although he may use the summit to gauge the EU appetite for a closer relationship, his formal outlining of the options is only expected after the summit – in a set-piece speech. The substantive debate is therefore likely to begin properly next year. Earlier this year, we set out the realistic options for the future relationship in our 'UKICE staircase'. This section looks in more detail at the likely economic implications of the different options, where public opinion currently sits on them, and how the EU is likely to respond to Burnham's new agenda.



THE ECONOMIC IMPLICATIONS

The economic case for a closer relationship with the EU is straightforward. Brexit has made the UK economy smaller, primarily by reducing trade, investment and productivity – although the story on migration is more complex. The Office for Budget Responsibility continues to estimate that the long-run impact will be to reduce GDP by about 4%, while more recent research suggests that the damage may already be considerably larger. Against this backdrop, the gains from the government's current reset are relatively small.

The question, then, is how much of this economic damage could be reversed by different forms of relationship. As the staircase illustrates, the economic benefits increase as the UK moves towards fuller participation in the single market. However, the estimates are necessarily uncertain. Most were originally produced to assess the costs of leaving, rather than the benefits of returning; economic structures have changed in the meantime, and some Brexit-related losses may prove difficult to reverse.

Table 1: Potential long-run impact of closer UK-EU relationships

Indicative increase in UK GDP relative to continuation of the current Trade and Cooperation Agreement (TCA)

Option	GDP gain (potential)	Principal economic effects
Customs union	0–1%	Removes rules-of-origin barriers; limited impact on wider regulatory barriers or services
Swiss-style	1–2%	Partial single market access; reduced barriers for goods; some benefits from free movement
EEA / single market	2–5%	Much lower barriers for goods and services; free movement; stronger investment and productivity effects
Rejoin EU	4–6%	Full integration of goods, services and capital markets; customs union; participation in EU economic policymaking

Sources: UK in Changing Europe (2026); Centre for European Reform (2026); OBR (2026); and Goldman Sachs (reported 2026). Ranges are broad judgements synthesising the available evidence, not formal confidence intervals or new model estimates. They are alternative scenarios, not cumulative gains.

The table illustrates two important points. First, there is a large difference between a customs union and the single market. The former would eliminate rules-of-origin requirements and would be particularly helpful for manufacturers with complex international supply chains. However, it would leave most regulatory barriers untouched and do little directly for services, where the UK has a comparative advantage. Indeed, recent Centre for European Reform research suggests that leaving the customs union accounts for only a relatively small proportion of the trade losses associated with Brexit. This implies that the gains from a customs union alone might be considerably smaller than earlier estimates suggested.

Second, the economic gains from returning to the single market, whether through the EEA or eventually through EU membership, are potentially much larger. The precise benefits would depend on the arrangements negotiated and how businesses respond. Nevertheless, there are good reasons to expect that reducing barriers to trade and investment, while restoring labour mobility, would raise both productivity and living standards over time. But the choice is about much more than trade policy. It also raises fundamental questions about the UK's economic model and its approach to growth.

One vision, implicit in much of the original case for Brexit, was that the UK could become a more independent, globally-oriented economy, using regulatory flexibility and an autonomous trade policy to exploit opportunities outside Europe. However, there is little evidence that this approach has delivered substantial economic benefits to offset the large downsides of Brexit. The government's own estimates suggest that its new trade agreements will increase GDP by only a fraction of a percentage point. Geography still matters enormously for trade, particularly in goods and complex supply chains. Regulatory divergence generally imposes costs on businesses that trade with the EU, whether or not the resulting rules are intrinsically better. Recognising this, neither the Conservative or Labour governments have pursued substantial divergence from EU rules since Brexit.

An alternative approach would see the UK more firmly embedded in a European economic model, combining openness to trade and migration with greater cooperation on industrial policy, energy, technology and security. This approach would recognise that access to a large, relatively integrated neighbouring market is itself a major economic asset, particularly for an economy struggling with weak investment and productivity growth. It would not preclude economic engagement with the US, China or other major economies, but it would be within a broader European framework, which would undoubtedly constrain the UK's actions but also increase its negotiating leverage.

The debate over the EU's proposed 'Made in Europe' provisions illustrates the dilemma. As European governments seek to strengthen domestic supply chains, particularly in strategically important sectors such as electric vehicles, defence and clean technologies, the UK risks being excluded from policies designed to support European production. Recent Franco-German discussions suggest that arrangements to include the UK may be possible, but potentially at the price of closer alignment with EU trade and industrial policies.

That will come with some costs. Britain has not joined the US and EU in raising tariffs on Chinese electric vehicles, thereby reducing the cost of electrifying transport, but at the expense of a falling market share for domestic car manufacturers. Meanwhile, closer alignment on tech regulation and 'digital sovereignty' – where the UK has taken a markedly softer-touch approach than the EU post-Brexit – could lead to political backlash from the White House and threats from US firms to withdraw investment from the UK. The practical economic benefits of independent policymaking, in other words, need to be weighed against the advantages of participating in decisions affecting the European economy as a whole.

There is, however, a further complication. Europe itself faces a serious economic challenge. Productivity and investment growth have been disappointing across much of the continent, while the US has pulled further ahead in technology and innovation. Europe's economies face pressures from ageing populations, high energy costs, Chinese competition and an increasingly unpredictable US administration. Mario Draghi's report on EU competitiveness makes the case that Europe needs deeper integration, larger capital markets and substantially more investment if it is to reverse its relative decline – however, so far, most of the key recommendations have yet to be translated into action.

Closer integration with the EU therefore offers the UK considerable potential benefits, but is unlikely, by itself, to resolve the country's underlying growth problems. The UK would still need to address longstanding weaknesses in investment, infrastructure, skills, housing and the effectiveness of government. Equally, a closer relationship could make those tasks easier, by increasing market size, improving access to capital and skills, and creating greater certainty for long-term investment.

There is also a distinction between economic integration and influence. The Swiss and EEA models would require the UK to accept significant EU rules, including free movement, while having little formal say over their development. Full membership would restore that influence, and with it the possibility of helping shape Europe's response to its economic challenges. This matters, particularly as trade policy, industrial strategy and economic security become increasingly intertwined.

Ultimately, the choice facing the UK is not simply how much of the economic damage from Brexit can be reversed. It is whether Britain sees its future primarily as an economically independent country

negotiating access to larger markets, or as an integral part of a European economic area attempting collectively to address the problems of low growth, weak investment and geopolitical fragmentation. Neither approach guarantees prosperity. However, the evidence suggests that the economic costs of remaining relatively isolated from our largest market are substantial, while the gains from greater autonomy have so far proved elusive.

PUBLIC OPINION

Not everyone in the Labour Party shares the apparent enthusiasm of the Prime Minister for reopening the Brexit debate. Many are nervous about doing so, fearing a backlash from Leave voters. Yet the risks this presents are often exaggerated. We are now a decade on from the EU referendum and public opinion has shifted a great deal. In polls conducted this year by several firms, a large majority of respondents say Brexit was a mistake, and voters say they would back rejoining by a two-to-one margin if a second referendum were held.

Table 2: Poll of polls on rejoining the EU

Pollster	Fieldwork dates	Question Type	In EU	Out EU
Ipsos	15-22.10.26	Apply to join/stay Out	**65**	**35**
Deltapoll	23-26.10.26	Rejoin/Stay Out	**66**	**34**
BMG	26-29.10.26	Join/Stay Out	**58**	**42**
Ashcroft	29.10-2.22.16	Join/Stay Out	**64**	**36**
Deltapoll	30.10-2.11.26	Rejoin/Stay Out	**59**	**41**
Deltapoll	6-9..11.26	Rejoin/Stay Out	**62**	**38**
Poll of Polls	- -	-	**62**	**38**

Source: WhatUKThinks: EU (2026)

Demographic change is one big driver of this shift. There was a big age divide in the original EU referendum and, as the years have rolled on, Leave voters have died in larger numbers than Remain voters. Meanwhile, those too young to vote in 2016 have joined the electorate and these new voters skew heavily Remain. These effects are substantial – Peter Kellner recently estimated that Remainers now constitute a majority of 2016 referendum voters who are still alive, and a huge majority of the new voters who have joined the electorate since in was held.

Voters can also change their minds, and here too the direction of travel has been against Brexit – nearly three in ten Leave voters now say they would back rejoin, while only one in ten Remain voters have switched the other way.

There is a clear partisan skew to these processes. Current or recent Labour supporters who either backed Leave or abstained in 2016 are much more likely to now favour rejoining the EU. Labour's

current electorate is heavily Remain not just because of the general drift towards remain among all voters. Voters who have stuck with or switched to Labour have gravitated towards Remain in the largest numbers. And more than 80% of voters backing Labour and those supporting the two other large 'progressive bloc' parties – the Liberal Democrats and the Greens – believe Brexit was a mistake.

Such figures suggest that, far from posing a political risk, moves back towards the EU represent a political opportunity for Labour, enthusing most of its current voters and attracting support from the other parties of the left bloc. But there are hazards ahead. Support for closer relations with Europe as a vague, fuzzy notion may not translate into support for the messy and difficult trade-offs any actual rejoin negotiation.

A recent report from Persuasion UK underlines the scale of the problem. Initial support for rejoining the EU ran nearly two-to-one in favour, but when the researchers 'stress tested' this support by presenting plausible re-entry deals with randomly varied costs and benefits, that average support dropped to just 52%. Requirements to join the Euro, give EU fishing fleets access to British waters, exit independent trade deals and make contributions to EU budgets all dropped support. All are very likely to be raised by opponents of rejoining in election and referendum campaigns.

The issue of negotiation poses a second problem – it isn't enough for a British government to favour hugging Europe closer. The EU has to share this enthusiasm. In some areas, notably defence, the enthusiasm is there but EU officials can read polls. They may be reluctant to do an ambitious deal with a British government when the largest opposition parties look certain to tear it up. A Labour government making big promises on integration with Europe risks being unable to deliver them, not because they are not trusted, but because their opponents' hostility to Europe is so obvious.

Big campaign promises on Europe also bring a more subtle political risk for Andy Burnham and Labour. The new Prime Minister has restored his party's political fortunes by presenting himself as a relatable leader in touch with the everyday concerns of voters. Another round of extended wrangling over customs unions and quotas, carve-outs and phytosanitary checks risks jeopardising that image, and alienating voters who do not see how such bureaucratic abstractions relate to their daily struggles.

Relitigating Brexit comes with two opportunity costs – it takes attention away from more popular domestic initiatives and moves attention towards topics which could reinvigorate and reunite Labour's main opponents. A big promise on closer relations with the EU now polls well on paper. But a live political argument about Brexit would be much messier.

ATTITUDES IN THE EU

And, of course, the issue of closer relations is not one for the British alone to decide. There is also the question of how the EU might respond to attempts by the UK government to forge a closer relationship. On the one hand, and as our staircase illustrates, Brussels is not about to offer any kind of bespoke deal involving further single market access in return for alignment in specific sectors. For many European policymakers, the UK now faces a choice between a substantively different type of relationship to that envisaged by the TCA and the status quo.

Two of the EU's chief frustrations with the UK in the last decade have been a lack of clarity about what it wants, and a lack of realism about the trade-offs implied by different choices. If Andy Burnham does

indeed initiate a frank discussion about the options, followed by a clear decision on Labour's preferred EU policy, then then that is likely to be welcomed in Brussels.

But delivering on whichever option is agreed will be far from easy. All those on the table imply negotiating a new treaty-based agreement, for which the EU would not be willing to offer the UK special treatment. Single market access – even if limited as with the 'Swiss model' – would entail significant payments into the EU budget as well as freedom of movement. Much the same could be said of a UK application to rejoin: the kinds of opt-outs or budget deal negotiated by British governments while the UK was a member state will likely not be on offer if it becomes an accession candidate. The EU will also need convincing that any deal agreed with a Labour government will not simply by ripped up by a future Conservative or Reform-led administration.

Member states will also be mindful of their own domestic public opinion. Europeans are enthusiastic in principle about the idea of Britain returning as a member state – earlier this year, two thirds of respondents to a large European Council on Foreign Relations (ECFR) poll backed this idea, with majorities in favour in every member state polled. But a second large poll from YouGov revealed that, while a large majority of French and German respondents support the UK's return, less than a fifth thought it should be allowed to keep the opt-outs it had before Brexit. More French and German respondents would oppose than support letting Britain back in, if it was with the old opt-outs in-tact. Similar resistance can apply also to looser arrangements – an older ECFR poll from 2024 found varying enthusiasm for allowing the UK more access to the single market in exchange for a closer security arrangement. All of which suggests that in any future negotiations, the EU's voters will be wary of anything that looks like special treatment for Britain.

Finally, the EU's approach to any future negotiations will hinge on both international and domestic politics. In terms of the former, the state of relations with the US and China will be key – an insecure EU that feels threatened might see it as in its interests to accelerate the accession of a large country with significant diplomatic and military resources like the UK. Though if the UK takes a markedly different approach to China trade policy and regulation of US tech, some member states may question whether the UK is sufficiently aligned on the EU's top policy priorities to justify its readmission. As for the latter, populist parties such as Marine Le Pen's ***Rassemblement National*** have opposed the idea of further EU enlargement (though they might well lick their lips at the idea of Britain subsidising France's EU budget payments), and it remains to be seen how this translates into policy should she triumph in next year's Presidential election.

For all that any future negotiations with the EU will involve masses of procedure and technical detail, it is the politics on both sides which will have the greatest bearing on events.

CONCLUSION

The summit and its aftermath are crucial for Andy Burnham's EU agenda. Yet in a curious sense, this summit – which has been built up as a major event – will be something of an anti-climax.

The Prime Minister hopes to announce a number of negotiating 'wins', pointing to the 'billions' added to the UK economy from deals on SPS, ETS and youth mobility. While the SPS and ETS deals might be 'done' in a technical sense, they will not be signed off before the issue of tuition fees for EU students is settled – a negotiation which could run for another six months. And, even if everything is fully signed and sealed, a lot of bureaucratic work is needed to implement the necessary legislation and systems, meaning nothing is likely to be up and running before 2028. There is a risk that the summit comes to be seen as a case of the UK government over-promising and under-delivering.

Nor does the future conversation look straightforward. The EU is hardly likely to engage directly with the Prime Minister over his future plans until it has some clarity on what the British government wants. Moreover, London is likely to be having that discussion just as the UK and EU are engaged in tough talks on China and student fees. If those are not going well, some people – within government and beyond – might think twice about the wisdom of embarking on a much deeper negotiations with the EU. The EU itself might also question whether Britian is suited to membership if it is refusing to align on issues, like tech and China, which are at the top of the policy agenda in Brussels right now.

The Prime Minister's EU agenda is ambitious, and therefore full of political risk, moving parts and competing interests. It will take a deft hand to manage them successfully.

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The authors of this report are:

- **Anand Menon**, Director, UK in a Changing Europe
- **Joël Reland**, Senior Research Fellow, UK in a Changing Europe
- **John Springford**, Associate Fellow, Centre for European Reform
- **Jonathan Portes**, Professor of Economics and Public Policy, King's College London and Senior Fellow, UK in a Changing Europe
- **Rob Ford**, Professor of Political Science, University of Manchester and Senior Fellow, UK in a Changing Europe

If you would like to hear more from any of our experts about a particular topic, you can get in touch with **joel.reland@ukandeu.ac.uk**.

020 7848 2630
info@UKandEU.ac.uk
TheUKinaChangingEurope
@UKandEU

www.UKandEU.ac.uk

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