THE TRANSATLANTIC TRADE AND INVESTMENT PARTNERSHIP: INTEREST GROUPS, PUBLIC OPINION AND POLICY

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The Transatlantic Trade and Investment Partnership (TTIP) constitutes an attempt to improve job creation and boost the economies on both sides of the Atlantic by eliminating tariffs and reducing other trade barriers, including many regulatory differences. Economic benefits and standard-setting impacts notwithstanding, politics and perceptions of acceptability, not economics, will determine the fate of the TTIP, thus making constituency support necessary for treaty ratification. This paper looks at the influence of civil society organisations on public opinion and mobilisation against the TTIP. It shows that opponents have made some inroads with the public. There are some correlations between anti-TTIP groups' activities, public opinion, and changes in the way the European Commission approaches the TTIP negotiations.

Introduction

In 2013 the European Union (EU) and the United States (US) began negotiating the Transatlantic Trade and Investment Partnership (TTIP). The US and EU have similar policy objectives, recognised processes and standards, and tend to seek trade agreements with the same countries and regions. The stalemate in the WTO has led the US and EU to pursue bilateral and so-called mega-regional agreements in order to sustain the liberal international order they created, and to set high global standards. More expansive than normal trade agreements, the negotiations still include tariff reductions, but focus primarily on removing overlapping and divergent regulations and reducing technical barriers to trade (TBTs).[1] Aimed at narrowing or removing divergent standards across the Atlantic, this means solidifying transatlantic ties amidst growing international competition by agreeing to varying degrees of equivalent or common standards in the world's two largest markets.

As evidenced in the EU's communications on trade in 2010 (*Trade, Growth and World Affairs*) and 2015 (*Trade for All*), the EU's multilateral track focuses on making bilateral and mega-regional

[1]. This paper includes insight gained from several personal discussions with EU and US negotiators, stakeholders and public officials over a four year period: 2012-2016. All opinion poll data and attitude surveys are from the Eurobarometer (357, 389, 419, 82.2 and 83.3) and the Pew Research Center Global Attitudes Studies of November 2011, April and September 2014, and May 2016.

agreements the stepping stones and dispersion mechanisms for multilateralism, including sectoral plurilateral approaches in the WTO. In such a context the logic of transatlantic standards becoming globally dominant and reinforcing the norms of a rule-based system, while enabling the compatibility with, and over time integration of, other agreements of similar structure and content is compatible with a multilateral trade track.[2]

Deep transatlantic economic interpenetration and interdependence means most sectors on both sides of the Atlantic will be affected, with macro-economic gains projected for both sides. Yet trade agreements often face resistance from select groups and portions of the general population who believe they may experience immediate and focused costs – notwithstanding potential, but diffused, long-term benefits to the overall economy. While trade unions have traditionally been sceptical about trade agreements, TTIP negotiations have garnered significant and unexpected opposition from civil society organisations (CSOs).

This paper focuses on European opposition to the TTIP. It first explains how opposition groups chose certain key words and phrases to raise salience, before briefly explaining why certain issues – sanitary and phytosanitary measures (SPS), genetically modified organisms (GMOs) and the investor-state dispute settlement system (ISDS) – are key to their campaign. The discussion then turns to how European opposition groups' dominance of the debate correlates with scepticism and declining European public support for the TTIP, as well as textual and procedural changes proposed by the EU. The last section explains why it is important to address opposition strategies and public support.

Opposition groups' choices

Unlike labour unions, European CSOs have not traditionally been very active on trade and investment issues. The campaign against the TTIP commenced in late 2013, and, despite its novelty and relatively limited resources, it has been remarkably successful. Groups like the European Consumer Organisation (BEUC), StopTTIP!, Friends of the Earth, and the Corporate Europe Observatory have succeeded in decreasing public support in the aggregate across the EU, turning public opinion against the TTIP in several member states, and convincing the Commission to significantly alter their proposal for investor protection. So how have they succeeded? And why were certain strategies and issues chosen?

2. For example: the EU-Canada Comprehensive Economic and Trade Agreement (CETA), the EU-Korea Free Trade Agreement (KOREU), and sections of the Transpacific Partnership (TPP).

3. The following paragraphs on Campact stem from three different interviews conducted in Brussels in May 2016, and via telephone in June 2016.

No organisation is more sophisticated or provides more ammunition to anti-TTIP groups than Campact.[3] Founded in Aachen, Germany, from which the anti-globalisation, anti-capitalist Attac also stems, Campact first emerged as player when campaigning for green labelling on products, at which time it gathered 800,000 email addresses. When transatlantic negotiations over rules, regulations, investments and a host of other issues commenced, European CSOs began expressing concerns about possible threats to EU standards stemming from allegedly "weaker" American standards. Many areas

previously addressed by consumer, health and environmental groups would later also become "hot topics", as they were all potentially affected by the multi-faceted, regulations-dominated TTIP.

Opposition groups needed specific words and phrases to educate and rally citizens, and Campact could provide these. The organisation promotes and engages in campaigns based on ideas provided by CSOs, but most importantly serves as a source of pivotal data. A CSO approaches Campact, which, for a fee, conducts market tests on policies requested by the client by using phrases and words on the topic or issue. It takes a name or process, ties it to the policy, and sends a query to targeted email addresses drawn from its electronic mailing list. Building on the responses they modify the message, associate the product, action, or process with something negative (e.g. chicken and chemicals, or ISDS and circumventing democracy), and retest the issue. The client is then provided with the results – or campaign "fuel" – resulting from the targeted emails (e.g. which words, phrases or associations evoked certain desired reactions).

The average citizen cannot be expected to engage with obscure issues and opaque trade negotiations, so, as one CSO representative said, we "needed something to raise fears and capture attention". In other words, raise the salience. Campaigns to raise salience cannot contradict, but should preferably tap into, some exciting beliefs and opinions when interpreting and conveying developments to the public. Such campaigns may include appealing to product or process associations, which in turn elicit a response. Thus, if chemicals (A) are associated with poison (B), associating a different product or issue (C) with A can elicit a negative response to C. CSOs acknowledge that specific issues such as food and investor rights were chosen not primarily because they represent issues on which groups have a better chance of influencing policy proposals, but rather because they help raise the salience of the TTIP generally, which in turn allows lobbying, protests and campaigns to also be made on specifics.

Groups like 38 Degrees and Campact worked on many issues related to or part of the TTIP before it was even announced, as Mattias Bauer of ECIPE noted, "… [for] these campaign "companies' business models", TTIP provides an ideal breeding ground to increase brand awareness and funding, respectively." Leading reformist opposition groups (BEUC, Corporate Europe Observatory) have also hired trade specialists from government and academia, adding additional in-house expertise while providing an aura of professionalism and sincerity to their cause. They write research reports and conduct studies that are published on their websites, and help with media campaigns. A few legal experts toiling in obscurity on ISDS (some of whom had been told when submitting academic papers that "this is not important") were suddenly coveted, as the concept of investors suing governments using secret arbitration panels tested well, and would become potent fodder for opponents of the TTIP. The farther negotiations proceed, the greater the demand from opponents; the greater the opposition to the TTIP the more people appear to donate and the more groups get involved (the "snowball effect"). The phrases and words shown to resonate with citizens are not just used in campaigns, they are also used when seeking funding from donors for specific campaigns.

Opposition groups are thus in many aspects as organised as the business lobbies they criticise.

Food and ISDS in the TTIP

For most Europeans the significance of food extends far beyond its nutritional value: it is an essential part of life, where caution prevails and discussions of recognising others' standards raise concerns. CSOs such as BEUC have successfully tapped into Europeans' deeply rooted socio-cultural relationship with food, and thus food safety, arguing that accepting American standards threatens higher (safer) EU standards. The former are seen as "weak" and "less safe", as is reflected in surveys, position papers, social media posts, online videos, protests, and public statements that are often picked up by the media. Discussions on food products, processes, and standards in the TTIP were always, in the words of one US negotiator, "going to be very difficult", and they remain a stumbling block. American officials have long stressed that they "want Europe to follow the advice of its own food safety authority and to give European consumers a choice, rather than to persistently ignore science-based decision-making for political ends". The US specifically wants acceptance of its SPS standards and most GMOs.

While Europeans widely support science and technology as the bases for policy and progress, the exception is food, where less than half believe science can improve food (make it safer). The anti-TTIP campaign has appealed to this relationship with food. Furthermore, the precautionary principle guides EU food policy, and European groups incorrectly claim the principle is not applied in the US: studies reveal little difference in the number of policy areas guided by this principle in the EU and US, even if the latter does not apply it to food. BEUC declared "It is not without reason that chlorinated chicken has emerged as a symbol of the detriments European consumers might face if a TTIP deal is signed … [t]he European approach to meat safety is more efficient in protecting public health", and that the American approach is "[t]he "easy fix" to make up for poor farming and slaughter hygiene". The European Food Safety Agency (EFSA) and domestic agencies have found numerous currently banned processes and products, many used in the US, to be safe; but, the necessary political approval is lacking. The prevailing norm of objection to GMOs is also deeply entrenched; the last Eurobarometer polls on GMOs, in 2010, showed that only 21% thought they were safe. Member states rejected a GM corn (MON810), which, like many other GMOs, was deemed safe by the EFSA. When the EU's chief science adviser urged more evidence-based decisions, she was forced out following political outcry over her views.

In a June 2014 open letter, which was either published or referenced by several news prominent European outlets, three leading civil society groups argued that, "Fair, sustainable and safe food could permanently be damaged by the transatlantic trade deal on the table." The WTO Sanitary and Phytosanitary Measures Agreement (SPS Agreement) has been disproportionately used by the US (on behalf of agribusiness) to challenge EU standards on a wide range

of food safety measures. "We cannot have confidence that the draft measures designed to expedite agricultural and food trade between Europe and America will uphold to the highest standards the food safety safeguards that protect consumers and animals."

Promulgating that the TTIP will allow American standards and that this may harm Europeans appears to have impacted public opinion. Only 30% of Europeans expressed concerns about residues such as antibiotics or hormones in meat in 2010 – before any talk of a trade agreement – but in 2014 there was great resistance to accepting American standards or altering what are perceived to be higher Europeans standards. 60% of Europeans also check the origin of their food, and for nearly half the origin influences their purchase. This is higher than for any other category of products, which indicates awareness of and concern with food and a likely higher receptivity to public campaigns regarding issues related to food.

The other key issue has been ISDS, a process meant to ensure foreign investors have access to depoliticised legal redress for compensation (not legislative changes) when a host country's government violates the terms of the investment treaty.[4] The Europeans have longstanding experience with ISDS through bilateral investment treaties (BITs), which began in Europe after WWII as investors wanted assurances when investing in former colonies. EU states have signed 1,400 BITs, compared with fewer than 50 signed by the US.

In the autumn of 2013 CSOs and unions staged protests and published policy papers opposing ISDS. The opposition was so intense that in January 2014 a negotiating pause on the issue was announced, during which time the public was to be consulted, and yet opposition continued unabated. CSOs held protests and panel discussions, created YouTube videos, used Facebook, wrote position papers, presented reports, and issued press releases against ISDS, emphasising what had been shown to resonate with citizens: that ISDS prevents policy flexibility and thwarts the principles of legitimate decision-making by providing foreign companies with secret legal redress against democratic decisions through suits in private, international tribunals.

Opposition to ISDS also worked its way into governments, with France and Germany expressing desires to see a renegotiation of the ISDS clause in the CETA agreement. Throughout the year think tanks, academics, and law centres also issued policy papers, legal briefs, and held panel debates; hard data countering opposition claims was also available.[5] Of the 150,000 submissions received through the Commission's 2014 public consultation, 97% were pre-formatted, anti-ISDS submissions from interest groups (96% from Austria, Germany, the UK, France, Belgium, Netherlands and Spain). Following the January 2015 press release of the results of the consultation, the Commission promised months of stakeholder dialogue and possible refinements to ISDS. This was met by CSOs with indignation. A September 2015 Commission proposal for a permanent Investment Court System (ICS) was rejected by CSOs as "too little", and by US officials and transatlantic business groups as unnecessary and going too far. ISDS thus remains a key focus of the campaign.

4. Cf. Franck, 2014.
5. Public citizens, TACD and Green MEPs have frequently cited Vattenfall vs Germany (*Vattenfall AB and others vs Federal Republic of Germany,* ICSID Case no. ARB/12/12) and Philip Morris vs Australia (*Philip Morris Asia Limited v. The Commonwealth of Australia*, UNCITRAL, PCA Case no. 2012-12) as examples.

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Public opinion

The frequency with which an issue is searched for on the internet often reflects its salience, and there was no discernible volume relating to TTIP prior to June 2013, when negotiations were launched and protests commenced. The following year Germany registered the most TTIP web searches, followed by Austria and Belgium, the three countries with the largest anti-TTIP movements and most CSO activity. Excluding the 31 pan-European organisations, the countries with the most groups are Germany (114), the UK (25), and Austria and France (15 each). Peak periods surrounded negotiations and protests in early and late 2014, January and October 2015, and April 2016.

Graph 1. Google Web searches for the TTIP June 2013-June 2016. Source: Google Trends.*
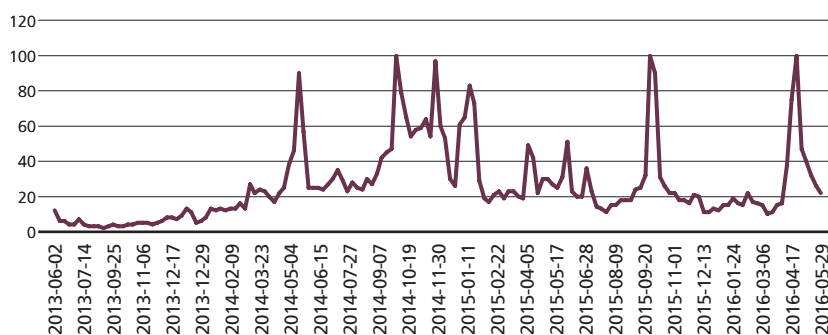
*All graphs from Google Trends reflect the number of searches for a term relative to the total number of searches over time. They don't represent absolute search volume numbers, because the data is normalised on a scale from 0-100. Each point on the graph is divided by the highest point and multiplied by 100. Google holds 90% of the European search engine market, and a 65% browser share.
Source: Statista.com, 2016.

YouTube searches on the TTIP also peaked around the same dates. Anecdotally, my own December 2014 and May 2016 TTIP searches showed 16 and 19 of the 20 first results on YouTube were explicitly anti-TTIP.

Graph 2. YouTube searches for the TTIP June 2013-June 2016
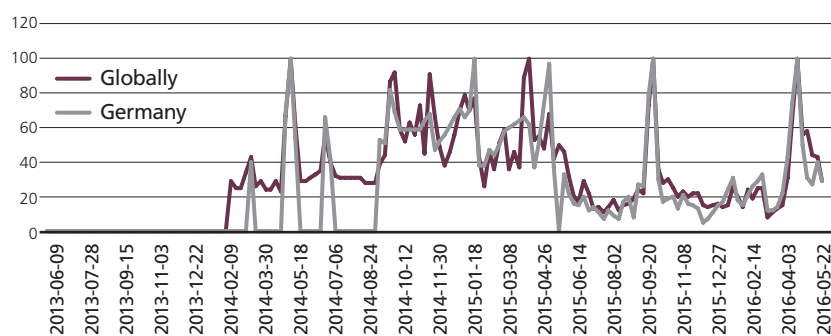
Source: Google Trends

In July 2014 the European Citizens Initiative, supported by over 200 CSOs, presented the Commission with a list of more than one million European signatures petitioning it to alter negotiations (remove ISDS) and hold hearings in Parliament. While dismissed (because the petition process does not apply to preparatory decisions, only legal acts), it succeeded in generating further outcry from citizens' groups and enhanced media coverage across Europe. By mid-2015 the initiative had gathered two million signatures, while the US Congress in turn debated trade promotion authority legislation requiring ISDS in trade agreements, providing fuel for European opponents. The Google Trends for ISDS show a similar pattern to the TTIP, spiking around negotiations, protests and intense campaign activism.

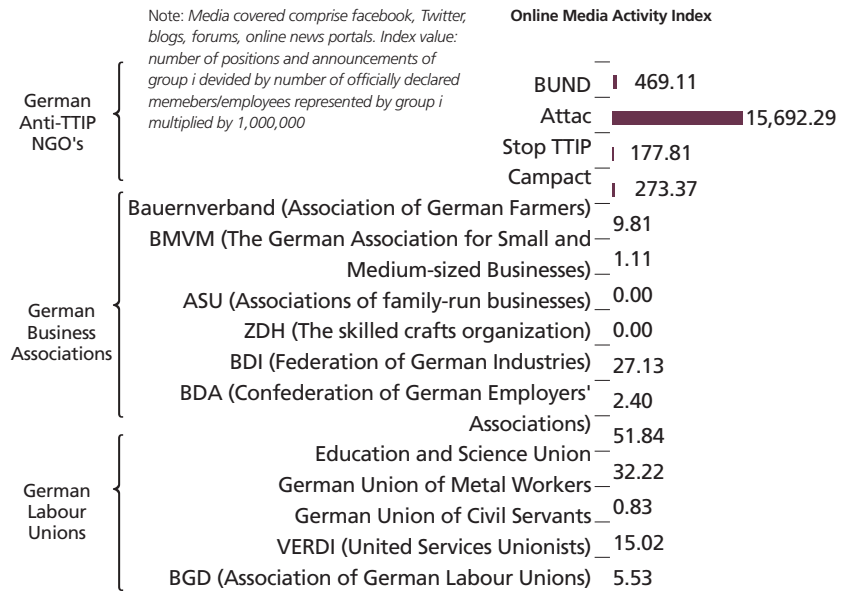**Graph 3. Web searches for ISDS June 2013-June 2016**
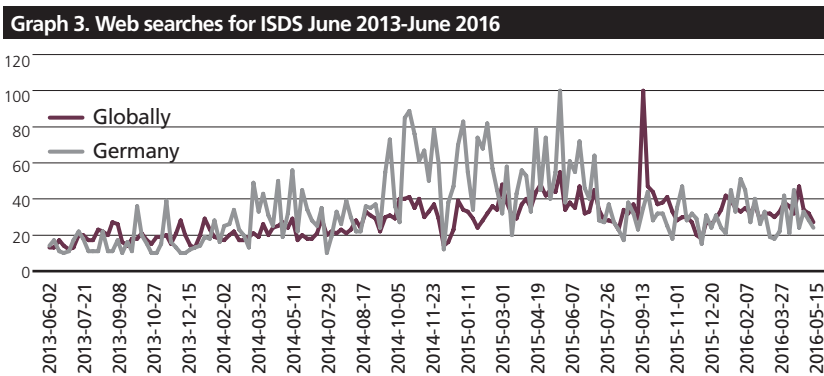
Source: Google Trends

In an online world, participation in petitions also serve as one form of public opinion, the results of which are covered by the media, which help convey the anti-TTIP message to larger audiences. While traditional media attention is crucial since TV remains the most popular source of information across the EU, and newspapers retain a significant share amongst those aged 55 and older, 60% of all EU citizens and 50% of the younger generation and those with a university degree get news from the web, including social media sources (of which Facebook, YouTube and Twitter are the most popular). As Ciofu and Stefanatu show, "Tweets that include hashtag words generally favourable to the agreement only make up roughly 1% of total tweets, whereas tweets advocating a clear no (through hashtags like #stopttip, #nottip, #noalttip and others) represent 99% of total TTIP related activity" on Twitter. Fact-checking on the web, including social media sites, occurs through exchanges (debate), where balanced views are not required, reinforcing negative messages. Furthermore, Bauer (2015) finds that

85 per cent of all TTIP-related positions in German online media are originally authored and spread by anti-TTIP groups. Similarly, for the July-December 2014 period, anti-TTIP groups' announcements in Germany amounted to 83 per cent of total online media reporting on average, going up to 93 per cent in peak times … around the TTIP negotiations rounds, and it is obvious that there are coordinated multi-online-media campaigns with high success rates (cf. Graph 4).
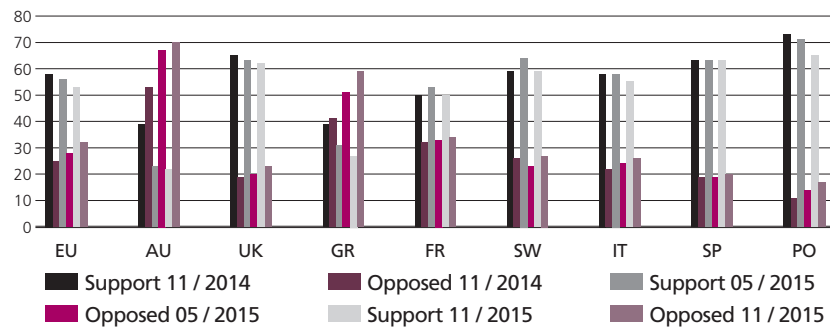
Graph 4. Online Activity on the TTIP in Germany

Note: *Media covered comprise facebook, Twitter, blogs, forums, online news portals. Index value: number of positions and announcements of group i devided by number of officially declared memebers/employees represented by group i multiplied by 1,000,000*

Online Media Activity Index

German Anti-TTIP NGO's

BUND	469.11
Attac	15,692.29
Stop TTIP	177.81
Campact	273.37

German Business Associations

Bauernverband (Association of German Farmers)	9.81
BMVM (The German Association for Small and Medium-sized Businesses)	1.11
ASU (Associations of family-run businesses)	0.00
ZDH (The skilled crafts organization)	0.00
BDI (Federation of German Industries)	27.13
BDA (Confederation of German Employers' Associations)	2.40

German Labour Unions

Education and Science Union	51.84
German Union of Metal Workers	32.22
German Union of Civil Servants	0.83
VERDI (United Services Unionists)	15.02
BGD (Association of German Labour Unions)	5.53

Source: Bauer, 2015: reproduced with permission.

Graph 5. Public Opinion on the TTIP 2014-2015

Support 11 / 2014 — Opposed 11 / 2014 — Support 05 / 2015 — Opposed 05 / 2015 — Support 11 / 2015 — Opposed 11 / 2015

Source: Eurobarometer.

Europe's long, favourable and expansive history of trade agreements could be expected to mitigate at least some of the negative messaging of the TTIP; even in the depths of the financial crisis (2010), 65% of Europeans said the EU benefitted from international trade, and general support for free trade has remained at around 80%. Yet, support for the TTIP across the EU has fallen, and in some larger EU countries fairly dramatically. While the aspects of the TTIP debated in most business and EU circles are not those promoted on social networks, the goal for every party is to influence public opinion to its advantage and, in this way, to exert pressure on policymakers. Opposition groups have been very good at this. With little public knowledge of ISDS, and an early focus on the issue, CSOs and unions could shape opinion by stressing the negative cases and dangers of ISDS, in addition to the scaremongering on food issues. When people search for the TTIP or ISDS and the results show a crushing majority conveying – often well-scripted – negative messages it is unsurprising that people start believing this story. The effects are visible, with declining support for the TTIP (Graph 5).

In an April 2014 Pew survey 55% of Germans thought the TTIP was "a good thing". While 88% of Germans said trade was generally a good thing, five months later only 39% supported the TTIP when asked by Eurobarometer, falling to 27% by November 2015, and only 19% in a <u>YouGov</u> poll in April 2016. Austria exhibited a similar decline. In no country did support increase between November 2014 and November 2015, though the largest group of respondents in five member states in April 2016 responded "don't know". There is also no correlation between general support for trade and specific support for the TTIP, another indication that anti-TTIP propaganda and protests have impacted public opinion.

Dismally low trust in government, with Eurobarometer surveys showing the EU average at 30%, helps the anti-TTIP campaigns, but the public appears to believe civil society groups: polls suggest their strategy works. Though the government continually assures the public that the National Health Service (NHS) will not be privatised through the TTIP, the percentage of British respondents who believed the government could protect the NHS dropped 24 percentage points from August 2013 to August 2014; 39% thought the TTIP would harm small business, and 54% did not trust the government to negotiate a deal in Britain's best interests. Even the European Parliament, where pro-trade sentiments normally override ideological and Europhile-Eurosceptic divides, has responded to the campaign and the bombardment of anti-TTIP emails and constituency protests. In October 2012 the European Parliament voted 526-92 for a resolution calling for the commencement of negotiations on a TTIP, but the lead report by the Committee on International Trade in January 2015 was highly critical, and the June 2015 resolution of continued support had to be postponed a month, with further revisions, when the socialist groups threatened to oppose the resolution because of internal divisions over ISDS.

Why this matters

Politics is about perceptions, and for agreements requiring European parliamentary and domestic legislative ratification constituency perceptions matter. The combination of professional testing, mass mobilisation, tech-savvy employees, and the proliferation of mobile, easy-to-use social media has enabled the growth of non-traditional actor participation, boosting public lobbying in ways unaccounted for by theories of interest group influence. Groups with limited resources have made effective use of selective data, simplifications, exaggerations and distortions, especially in social media disseminations, where participation and engagement by a vocal minority can play an outsized role in evoking opposition in the general public, while simultaneously attracting attention from the "traditional" media. Appealing to the public about the possibility, however remote, of having to accept GMOs, chlorinated chicken and companies suing governments has worked well. "Potentially", "perhaps", "maybe", "could", and other cautionary words implying threats have also been purposefully and successfully employed, dominating the opposition campaign. The recipient notices the action or threat (chlorine chicken, governments sued) rather than the modal verbs signalling a remote possibility. As Mattias Bauer comments "Unfortunately, anti-TTIP groups keep on spreading speculations and

risks that are completely irrelevant and frequently taken out of the blue … Due to Campact's efforts, we have arrived at a stage where German citizens' interest in TTIP is 25 times higher than in the US and roughly 15 times higher than in France. The sad thing is, however, that most citizens are simply misinformed, e.g. by paid-for Google advertisements set up by anti-TTIP groups."

EU negotiators and Commission officials have generally been surprised by the extent and success of anti-TTIP groups, including their ability to organise across Europe. Perhaps they should not have been. The 2012 defeat of the Anti-Counterfeiting Trade Agreement (ACTA), to a large extent through CSO lobbying – forcing governments to cease ratification – challenged the correlation between resources spent lobbying and campaigning and policy change.[6]

EU officials have been forced to repeatedly and publicly guarantee that EU standards would not change, yet opponents' actions have led EU negotiators to alter their approach in ways that would have seemed impossible only a few years ago: affecting agenda setting, procedure (how), and policy (what). On SPS and GMOs this meant restatements and clarifications from the Commission, narrowing and reinventing the language on ISDS the Commission initially proposed (i.e. the CETA text), and a policy change to release all proposed texts and hold public stakeholder meetings, both of which will have lasting effects beyond the TTIP. The promise of "continued dialogue" with stakeholders and civil society groups was, as one Commission official admitted, an acknowledgement that CSOs' "push" and "opposition", along with altered public sentiments affected how they reviewed ISDS and how they decided to go forward with "the messaging" (though the Commission's January 2015 press release was strategically worded to balance recognition of opposition with a determination to find a compromise to ensure ISDS is included in a final agreement). All this may have a substantial impact on the outcome of the TTIP, especially since members of the US Congress have made clear that there will be no agreement on TTIP without poultry access; the latter being a requirement by the influential American agriculture-farming industry.

Like the Commission, proponents of the TTIP, such as industry representatives, were surprised by and unprepared for the strong anti-TTIP activism. Whereas the Transatlantic Business Council and chambers of commerce have actively promoted the TTIP through events, publications and social media, individual firms are reluctant to wade in against public opinion and counter interest groups' campaigns for fear of a bad public image and upsetting customers (as was the case in the Brexit referendum campaign until shortly before the vote). A representative of a transatlantic business organisation acknowledged, "[t]hey [the industry] realize now that civil society groups now have an advantage in the marketing of TTIP and TTIP issues, and that businesses have difficulties in getting across their concerns and issues and difficulty conveying the truth and countering misperceptions distributed by public interest groups. There are intense discussions now on how to counter misperceptions and promote TTIP."

6. Dür and Mateo, 2014; Baumgartner et al., 2009.

One must acknowledge that opposition to the TTIP could be masking opposition to globalisation and neoliberalism generally. Globalisation

is inherently tied to free trade and the spring 2015 Eurobarometer shows that people who reject the globalisation process and oppose the EU are particularly against the TTIP. Good knowledge of economics and more favourable views on the EU correlate with support for the TTIP, while having solely a national identity correlates with opposition to the TTIP. Furthermore, in regions where the economy is doing well and incomes are high, support is higher, and vice versa. However, these findings lend support to the inference that the framing by anti-TTIP campaigns has receptive audiences, especially among those with little prior knowledge of trade-related issues; support for trade generally has remained high even as support for the TTIP has fallen. Furthermore, except for opposition to CETA, which has ridden on the coattails of the asserted "democracy-killing" TTIP, there have been no protests against any other contemporary negotiations, or completed treaties since 2000. Thus the objections appear more closely tied to the content and partner in TTIP negotiations.

The TTIP, like CETA and KOREU addresses regulatory issues, and the public perception that the TTIP will lower standards, while previous agreements did not, indicates that such perceptions are premised on fears of the US. Hence, the anti-TTIP campaign has succeeded. Research indicates that when faced with conflicting opinions, those holding positive views tend to remain silent, allowing the more critical crowd to dominate the discussion. While alarmist, fear-filled messaging tends to have more impact than facts, supporters must find a better way of communicating the benefits of the TTIP in person and online in easy-to-understand and convincing fashion. This applies especially to member state governments, who appear to have abdicated responsibility for the content and progress of negotiations they authorised and must ultimately ratify, leaving Commission negotiators to simultaneously explain and defend the proposed content of a deal they have only been tasked with negotiating, not selling. While all EU nations still consider the US the most important nation or region for Europe, and fears of too much US global influence stand at only 25% in 2016, it appears that Europeans believe the US has low standards and/or doubt the EU can stand up to American pressure. The anti-TTIP campaign has sown mistrust of the US, a development which still needs further research.

An inability to agree on a comprehensive deal between the world's closest allies and largest economies would seriously impact both parties' international standing – especially the EU's – if the US ratifies TPP. The EU's goal of using bilateral agreements to expand the multilateral agenda in a step-by-step fashion will be seriously impeded should the two largest economic areas and closest allies fail to reach a precedent-setting agreement. The EU might succeed in reaching bilateral agreements with all TPP members (and additional Asian nations). Yet achieving coherence and consistency across all agreements, as well as compatibility with US agreements in order to ensure standards rise across the major trading areas, will be very challenging without transatlantic agreement. The United Kingdom's vote to leave the EU may complicate negotiations, yet the US administration has repeatedly insisted that no separate UK-US deal will be contemplated as long as TTIP negotiations proceed. Thus, the likelier scenario remains one where the UK accepts the TTIP through an association agreement, as a member of the European Economic Area, or negotiates a separate UK-US deal

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subsequent to the TTIP's completion. Irrespective of the final path negotiated by the UK and the EU (the exit negotiations run parallel to the TTIP negotiations), one thing is clear: absent public support even a finalised TTIP agreement will face serious problems with ratification in many member states, and anti-TTIP civil society interest groups thus far appear more successful in garnering support.

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