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BRITAIN'S STRATEGY FOR A DECADE OF DANGER

OUR NATION, OUR CONTINENT, OUR WORLD

DISCUSSION PAPER

Mark Leonard

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SUMMARY

Since coming to power, the Labour government has successfully rebuilt Britain's diplomatic profile through deals on trade, migration and defence. But success abroad masks the extent to which Britain's domestic woes over the last decade have international roots.

What appear to be two separate challenges – foreign and domestic – are in fact inseparable. But by pursuing solutions to one without regard for the other, the government risks undermining both, and depriving itself of political arguments against its populist rivals. It needs an international strategy which is political, and a political strategy which is international.

Three structural shifts define today's 'Un-order'. Britain's strategy should respond to all three of them.

- First, the **rise of great power competition**: American abandonment of the institutions of liberal order and its retrenchment from key theatres is alienating allies and allowing regional actors to carve out new roles for themselves.
- Second, the **weaponisation of interdependence and the fraying of multilateralism**. Globalisation has not ended but global rules are fraying. Crises of interdependence – the financial crash, eurozone turmoil, migration surges, the Covid-19 pandemic, climate change – create overlapping shocks that spread insecurity, increase the cost of living, divide communities and threaten jobs in the UK.
- Third, **international crises have become political fuel at home**. Populist parties jump from one grievance to the next, undermining state legitimacy and deepening divides.

Other powers have been adjusting to this new world.

- The US has launched a revolution against the liberal order and pursued predatory policies towards its allies.
- China has pioneered a move to self-sufficiency and technological leadership, and is positioning itself to exploit the disruption of the old order.
- The EU is re-arming, protecting its borders and reinventing itself as a security bloc.
- Middle powers like India and Turkey play all sides.

These three trends and the way in which other powers have been reacting to them create a special set of challenges for the UK. But Britain's foreign policy debate has not yet caught up and is defined by old assumptions about the US, trade and Europe. It needs a grand strategy that clearly defines the country's strategy for security, growth and migration, and how its role in the world can help deliver them.

This paper identifies three ideal types for a future UK grand strategy – each with advantages and disadvantages.

- **Model 1: A modern special relationship,** focussed on US alignment, Five Eyes, NATO primacy, and maximum interoperability, recognising that the UK has no near-term alternative to the US as its core security provider.

- **Model 2: Global Britain 2.0,** a diversified, multi-regional strategy leveraging partnerships in the Indo-Pacific, Gulf and Commonwealth. Britain would align itself with other mid-sized democracies – Canada, Australia, Japan, Korea – that are trying to preserve parts of the rules-based order while under double coercion from China and the US.
- **Model 3: A Pivot to Europe in a dangerous world,** anchoring the UK in Europe's emerging security and economic ecosystem – without necessarily rejoining the EU. The EU has become a security union, not the liberalising bloc of 2016. It remains the UK's biggest market and the route by which all irregular arrivals reach Britain – so a more structured relationship could deliver major returns on the growth and migration fronts.

Given the unreliability of the US, and the UK's specific geography and interests, the analysis concludes that **'Pivot to Europe' is the only model capable of addressing the UK's core strategic challenges**, but it must be combined with a collective effort to modernise the US alliance and an investment in renewing selective global partnerships.

A NEW STRATEGY FOR A NEW WORLD

A new grand strategy will rest on three pillars: recasting the relationship with Europe, de-risking from the US and China with Europe, and reinventing the machinery of government.

1. **Recasting the European relationship,** to embed the UK within Europe's security-led project. That should involve building a caucus of pro-UK states inside the EU, forging coalitions around Russian aggression, migration, Chinese economic coercion, energy and technology security, and developing joint defence and economic security frameworks. As a starting point, the UK should signal its seriousness by moving to join the Customs Union and exploring the options for a much closer relationship in the 2030s.
2. **De-risking relations with the US and China with Europe,** by improving national resilience through coordinated supply-chain reviews, industrial policy aligned with European markets, tech and energy partnerships, and a renewed focus on societal preparedness for external shocks.
3. **A Labour government will need to reinvent the machinery of government to link its international policies with its domestic political strategy**. The FCDO should become an engine for national priorities: security, growth, migration and community cohesion. This means rebuilding state capacity through a European Affairs Directorate in the Cabinet Office, rebalancing FCDO staffing toward European capitals, embedding trade, economic security and migration expertise across diplomacy, and closer cooperation with corporate Britain on defence, tech and energy. Economic policy must prioritise resilience: securing supply chains, shielding key industries, and aligning foreign policy with the industrial strategy. The FCDO should consider creating a new 'domestic division' to engage politically with different communities around foreign policy concerns.

INTRODUCTION

For all the problems he has experienced domestically, Keir Starmer has earned plaudits for successfully rebuilding Britain's diplomatic profile through deals on trade, migration and defence. However, the narrative of confusion at home but success abroad masks the extent to which Britain's domestic woes over the last decade – Greek levels of debt, Italian fertility rates, Japanese growth, migration levels like Germany's in the refugee crises, and a galloping cost of living reminiscent of middle economies like Turkey – have international roots. And Starmer's tactical successes do not change the reality that Britain's most important trade relationship still lies in tatters after Brexit, while its most important security relationship rests on ever shakier foundations.

The government remains boxed in by a political debate framed by outdated assumptions. What's more, reluctance to speak critically of either Trump or Brexit makes it hard to effectively counter the agenda of populist forces.

What appear to be two separate challenges – foreign and domestic – are in fact inseparable. By pursuing solutions to one without regard for the other, the government risks undermining both. Until it lays out a clear foreign policy that connects global action to domestic needs it will struggle to shift the dial in any of these areas – let alone to develop a persuasive story about Britain's role in today's world. It needs an international strategy which is political, and a political strategy which is international.

1. THE GEOPOLITICS OF UN-ORDER

In 2026, each of the great powers and a lot of the middle powers are fundamentally recasting their international policies to reflect three radical changes. For the UK, which thrived in the post-1945 and post-1991 orders, there are profound implications at the international, regional and domestic levels.

First, **the rise of great power competition** and the end of US 'liberal hegemony'. The preponderance of American power after the Cold War is being challenged by the growth in relative importance of China, and the reassertion of autonomy by middle powers such as Russia, India, Brazil, Turkey and the Gulf states (Chappell, Pultz and Srinivasa Desikan 2025). In 1950, the US and its major allies (NATO countries, Australia and Japan) and the communist world (the Soviet Union, China and the Eastern bloc) together accounted for 88 per cent of global GDP. But today, these groups combined account for only 57 per cent of global GDP (Roser et al 2023). US abandonment of the global institutions of liberal order and its military retrenchment from key theatres is leaving allies uncertain and allowing regional actors to carve out new roles, from the North Pole and the South China Sea to the Middle East and the Horn of Africa.

Obviously, from a UK perspective, the region with the biggest security challenge is Europe. With Putin's full-scale invasion of Ukraine and the sudden reality that Europeans can no longer have full confidence in the single most important foundation of their security – the transatlantic alliance – the continent has been consumed by a major security crisis which represents the end of the post-war regional order. Trump's predatory approach to Greenland raises even more fundamental questions about the alliance. And the events of the past few weeks have made clear that this is not simply a transition, but a full on "rupture" of the liberal order – to borrow Mark Carney's formulation from his speech at the World Economic Forum in January.

Second, the **weaponisation of interdependence and the fraying of multilateralism**. Hopeful theorists of international relations thought that binding the world together into a single economy would also unify its politics (Friedman 1999). Today, geopolitics in our globalised world is a bit like a marriage that has gone wrong, but where the couple can't get divorced. In a troubled relationship, the couple use the things that brought them together in the good times to hurt each other in the bad times. In geopolitics it is about manipulating supply chains, sanctions, forced migration, export controls, tariffs, energy cut-offs, cyber attacks and election interference. Globalisation has not subsided, but the pursuit of national power and security have increasingly competed with low price and convenience to define economic relations (Leonard 2021; Farrell and Newman 2023). Parts of the multilateral system are still standing when it comes to rules around international finance, commercial law or aviation and maritime rules, but they are increasingly inflected by geopolitical considerations (Sands 2025). And in many other areas, trying to work within the system is fruitless. WTO principles such as 'most favoured nation' have been undermined by unilateral tariffs and China's state-driven

strategies. Multilateral negotiation, monitoring and dispute settlement have broken down.

Third, **international crises have become political fuel at home**. Since 2007, when the financial crisis broke out, global crisis has been the order of the day. The Great Recession was followed by the eurozone crisis, a European 'migration crisis', in 2020 the Covid-19 pandemic began, and in 2022 Ukraine escalated, followed by an energy and supply crisis, topped off by inflation. The term 'polycrisis' has become increasingly popular to explain the coexistence, and overwhelming cumulative effect of these different crises (Tooze 2022). The hope on the left has been that crises would be unifying. But instead of forging a global sense of unity, the polycrisis has fragmented the world and our own societies, and delegitimised and overwhelmed the state.

These three trends are both cause and effect of major changes in the grand strategies of the great powers in the world, as well as the increasingly assertive middle powers. The UK needs to appreciate these changes, understand how they are interacting and prioritise designing its own response.

Donald Trump has instinctively grasped the fact that the US is losing relative power in the global system. His response is first, to take the US from being a hegemonic power invested in upholding the global system to becoming a 'normal' country that defends much more narrowly defined national interests. That is the core meaning of 'America first': a shift from a longer-term view of a national interest embedded in a particular environment to a shorter one focussed on relative gains. In MAGA's reading of history, long-time strengths are cast as vulnerabilities: allies are burdens, free trade is a rip-off, immigration is a threat, and foreign aid and multilateral organisations are a drain on resources better used domestically. Trump has acted on these instincts, imposing tariffs across the board, bullying NATO allies into higher defence spending goals while openly questioning the value of the alliance, pulling the US out of multilateral institutions, and cracking down hard on immigration. In January 2026, the administration's willingness to disregard norms, prey on allies, and assert raw national self-interest on the world stage reached a climax, following the extraordinary capture of Venezuelan president Nicolas Maduro, with the US president's statement of intent to acquire Greenland, whether by economic coercion or military force. The underlying impulse seems to be to insulate the US from a world of Un-order. As China approaches strategic parity with the US, Washington will increasingly face zero-sum decisions about where in the world to focus its energy. Europe will most certainly not be its main focus. In 10 years, regardless of who occupies the White House, the defence of Europe will be predominantly Europe's responsibility.

Whereas Western leaders have talked in recent times about restoring order, Beijing's basic assumption is that we're entering a period of disorder where many of the norms and international institutions are being turned on their heads. One of Xi Jinping's favourite phrases is that the world is undergoing 'great changes unseen in a century' (Ministry of Foreign Affairs of the People's Republic of China 2025). China's strategy over the last decade has been to make itself more resilient in the coming chaos. On climate, China understood the opportunity to dominate the carbon transition. On capitalism, it introduced the notion of 'dual circulation': reducing its reliance on the west while trying to increase the dependence of other economies on China (Yu 2023). On demography, Beijing has been preparing for the shift from a Euro-Atlantic world to one dominated by Asia and Africa with policies aimed at building links with the global south and emerging markets. On technology, the Made in China 2025 plan led to the investments of 1–2 per cent a year into 10 key domains where Beijing hoped to become self-sufficient, such as clean energy, chips and EVs. And now its eyes are set on 2035, aiming at dominance of clean

energy, quantum technology, bio-manufacturing, hydrogen and nuclear fusion, brain-computer interfaces, embodied AI and 6G communications (Reuters 2025; Global Times 2025).

Of the great powers, Europe was perhaps the most attached to the post-Cold War order. Its vision of a peaceful union bound by shared rules and peace through prosperity had been fraying through the euro crisis and the refugee crisis. But it ended forever with Russia's full-scale invasion of Ukraine and Trump's re-election. Consequently, Europe's response to the age of Un-order has been to adjust the model that defined the EU since its inception and to coalesce around a strategy that can be summed up as 'de-risking, diversifying and deepening'. It must de-risk by lessening its reliance on Russian energy, Chinese critical minerals and American security guarantees. Diversifying goes hand in hand with that, and spreading its trade and supply chains more broadly is also a hedge against less trade with a tariff-happy America. Finally, Europe is trying to deepen its internal market to compete on the same level as its rivals. The British debate about Europe is still often defined by the post-Brexit consensus. But the EU that Britain left in 2020 is almost unrecognisable from the bloc today. The EU most British voters and politicians imagine stands for free trade, open borders and peaceful coexistence. Since 2022, that EU has been eclipsed by one that stands for trade protectionism, well-defended borders and re-armament. It has, in other words, moved from being a 'peace project' to a 'war project'. Most of the energy on integration now comes from security.

America's retrenchment has opened up unprecedented room for manoeuvre for a host of middle powers including India, Turkey, Saudi Arabia and Brazil. While their strategies and interests vary, all seek to maximise sovereignty and avoid rigid alignments, an approach I term 'polyamory' (Leonard 2023). India has been building an ever-closer relationship with the US and Quad allies in the Indo-Pacific to counter China's rise, while buying Russian arms and oil and seeking closer links with Europe. Turkey is a NATO member and candidate for EU membership but is also happy to cosy up to Russia when necessary, while pursuing its own regional ambitions in the Middle East and the Balkans. Saudi Arabia is seeking an American security guarantee and help building nuclear reactors while buying missiles from China (U.S.–China Economic and Security Review Commission 2025; *Economist* 2025). As powers with a clear upward trajectory, they are happy to enter into relationships with all manner of partners.

It has become commonplace to quote Gramsci's analysis that we are in an interregnum where the old order has died but the new cannot yet be born (Gramsci 2007). But the idea of a 'world between orders' implies that some new form of stability is around the corner. We actually find ourselves in a world of 'Un-order'. An order is based on a set of power relations and rules which have legitimacy. Disorder is what happens when parties deliberately break the rules. Hence, when people talk about disorder, they are paradoxically reaffirming the existence of a commonly agreed set of norms and power relations. 'Un-order' is what happens when the rules have been overtaken by events and there is no agreement about what is right, wrong or important. In a period of 'Un-order', geopolitics is defined by unpredictability, a fraying of international institutions and a permanent sense of crisis (Leonard 2026).

2. WHAT THIS MEANS FOR UK INTERESTS

The three global trends of Un-order create a special set of challenges for the UK. For 80 years, the core assumption of UK foreign policy was that the world was liberalising and that Europe was at peace. The two central pillars of its foreign policy were an economic and trading relationship with the EU and a security alliance with the US. This was coupled with global links inherited from empire and an outsized role in international organisations, from its seat on the UN Security Council to its membership of the G7.

Each of the elements of this worldview is unravelling. Europe is a continent at war. The international order is fragmenting. Brexit has upended our economic relationships. Trump is raising profound questions about the transatlantic security order. Meanwhile, the key multilateral organisations are riven by geopolitics.

The Starmer government, rightly, came into office wanting to repair relations with Europe, handle Trump as well as it could, and recast its relationships with other partners like India. It has been very clear in its priorities: growth, security and migration. However, the wider debate in the UK media and parliament has mainly been defined by reactions to a world that no longer exists rather than an attempt to face up to our age of un-order.

Britain's traditional security approach is rooted in an almost unquestioning faith in American leadership. For many in Whitehall, the idea that the US might one day abandon the transatlantic relationship to focus either inwards on itself, or on the competition with China, is simply too horrifying to imagine and is thus frequently downplayed in decision-making. Hence the UK's unseemly clinging to the US even as the EU moves towards de-risking, diversifying and deepening. Meanwhile, the UK's economic debate is still too focussed on free trade and multilateral institutions. Since Brexit, London at first sought trade deals in an attempt to become a 'Singapore upon Thames' – low-tax, lightly regulated and globally-oriented – but with relatively little success, as economic security and protectionism became the bywords of a new economic age. And this was without reckoning with Trump's tariffs.

But perhaps the biggest way that the UK is out of touch is in its approach to Europe. The EU has moved from being a peace project to a war project, a change reflected not only in the Berlaymont and in national capitals but also in public opinion. The British debate has not kept pace.

To the extent that the government has committed a foreign policy strategy to paper (HM Government 2025; Ministry of Defence 2025; UK Government 2025), what emerges is a desire to keep as many options open as possible to avoid tough choices. Admittedly, it seems reasonable not to commit Britain to a rigid plan which might prove difficult to deliver. It would, however, be helpful to have a few mental models for what a British grand strategy might look like, which take the big changes described in section 1 into account and spell out the trade-offs.

Developing a strategy includes defining vital interests (territory, security), important interests (prosperity, supply chain resilience), and values-based interests

(human rights, democracy) – and then working out which approach is more likely to advance them.

I identify three ideal types for a future UK grand strategy. These are necessarily simplified archetypes, but weighing their trade-offs is a necessary starting point for formulating strategy. The table below summarises the different elements of each one.

TABLE 2.1: THE WAY AHEAD? THREE STYLISED 'GRAND STRATEGIES FOR THE UK

Component	Modern special relationship	Global Britain 2.0	Pivot to Europe
Vision	UK as US's closest ally	UK as global broker	UK as European security anchor
Threat view	US-defined great-power contest	Multi-regional risks	Russian threat + US retrenchment
Alliances	US-centric, Five Eyes	Indo-Pacific + Gulf	EU states + NATO Europe
Defence	Max interoperability with US	Global deployments	Build European pillar to complement transatlantic alliance
Economic statecraft	Align with US	Diversify globally	Tie into EU economic security
Global agenda	Follow US priorities	Spread across continents	Act jointly with Europe
Diplomacy	Transatlantic focus	Worldwide activism	European coalitions as foundation for global strategy
Domestic base	Dependence on US cycles	Requires openness to globalisation	Requires Europe-facing consensus
Values	Acceptance of ideological divergence with US	Pragmatism over ideological alignment; 'thin' global order	UK bound into liberal European community of values

Source: Author's analysis

MODEL 1: A MODERN 'SPECIAL RELATIONSHIP'

The strategic vision of this approach is to re-establish the UK as America's closest global partner. This means prioritising transatlantic security, Indo-Pacific deterrence, and alignment with US grand strategy. This model views great-

power competition primarily through the US lens: seeing China as a systemic rival and Russia as an immediate threat primarily for Eastern Europeans. It sees opportunities in US technological leadership, defence innovation and trade. The price is to accept greater exposure to US political volatility and policy swings, as well as potential intrusion on domestic policy questions which might have long-term consequences for social cohesion.

In terms of alliances this view sees NATO and the Five Eyes as the core, but with a strong bilateral UK–US axis. There could be secondary partnerships with Australia (AUKUS), Canada and Japan. This would imply much looser EU engagement, mainly through NATO channels. On defence, the goal would be to increase interoperability with the US military, including nuclear cooperation and strategic enablers. There would be big investments in AUKUS technologies (submarines, quantum, AI). Defence procurement would be heavily oriented toward US platforms. On the economy, there would be an attempt to seek a bilateral UK–US trade agreement or sectoral accords (data, digital, clean tech). There would also be a push to align with US export controls on China, sanctions tools and investment screening. The UK would concentrate its diplomatic capacity in Washington, New York (UN) and its Indo-Pacific missions. It would strengthen intelligence ties via the Five Eyes. Soft power would need to be deployed to reinforce the image of the UK as America's reliable ally.

The rationale for this policy is simple: keeping its citizens safe is the most fundamental obligation of a government. As it stands, there is not an alternative to the US as the UK's primary security provider. In spite of the surface rhetoric, the special relationship has continued under Trump, particularly on defence and intelligence. The UK has proved that it can still provide value for the US, as when Wittkof effusively praised the UK government for helping secure the Gaza ceasefire (Witkoff 2025).

Meanwhile, US tech giants have invested heavily in the UK's AI industry (Reuters 2025). Given that the UK's fiscal situation imposes hard limits on the amounts that the country can invest in AI input and the lack of cutting-edge companies and high local energy costs, the deal with the US is critical in maintaining the UK's status as an AI power and is the only realistic way to get a seat at the table. Last summer, Alphabet alone announced it would spend more on AI just this year ($85 billion) than the entire UK defence budget (£60 billion) (CNBC 2025). European countries simply can't compete: the UAE already has nine times the compute of France, Germany and Britain combined (TRG Datacenters 2025). Finally, even as other American allies have been hit hard by tariffs, the UK has managed to come away with the best deal of any US ally.

There are, however, risks associated with this approach. The biggest one is heavy exposure to US election cycles and economic security decisions. Furthermore, it means being able to rely on a societal consensus in favour of Atlanticism when the US is moving in a direction most British citizens find distasteful. This is not an unprecedented situation. But Donald Trump is not George W. Bush. He is a revolutionary president at the head of a revolutionary coalition that increasingly sees the UK as actively hostile. Add to that speculation about 'kill switches' in critical US weapons systems like the F-35 and the frequently pernicious role Washington is playing in Ukraine (Gosselin-Malo 2025) and Greenland. Even the low tariff rate is worth less than it seems and may have been less the result of skilful British negotiation than the fact that the Trump administration's crude calculations happened to favour the UK, with its trade deficit with the US in goods. Regardless, the trade relationship with the EU is worth about 2.5 times more than Britain's trade with the US. Meanwhile, partnership with a US which desires full domination of the AI ecosystem threatens UK sovereignty.

Consider the following: if a foreign leader arrived in office and, in a single year, demanded billions from the NHS, threatened the BBC, backed Tommy Robinson, impugned Britain's military contribution in Afghanistan, proposed rewarding Russian aggression, threatened to seize the territory of a mutual ally, and imposed a permanent 10 per cent tariff on key sectors, we would hardly consider it a friendly government. The reality is, with the tensions having come to a head over Greenland, such an approach already appears unsustainable. With diminishing US credibility, NATO covers only part of the UK's security needs, and the opportunity cost of clinging to the special relationship is growing: while the UK has sidled up to the US, it has been on the receiving end of EU tariffs, growing mistrust, and being blocked out of schemes like Security Action for Europe (SAFE). Domestically, the reliance on the US massively weakens the government's ability to combat the far right.

MODEL 2: 'GLOBAL BRITAIN' 2.0

The second model is to pursue diversified economic and diplomatic ties across continents. In the wake of the Canadian prime minister's intervention at the World Economic Forum, in which he urged middle powers to recognise the end of the international order and build plural, pragmatic alliances, we might think of this as the Carney strategy. The strategy would be to assert the UK's role as a middle power with global reach – not dependent on any one bloc. Britain should pursue opportunities in Indo-Pacific growth, Gulf capital and Commonwealth networks. It should seek to hedge between the US, EU and Asian powers. The foundation would be strengthened ties with Canada, Australia, India, the Gulf, Singapore, Japan and African partners. The UK would reinforce the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) and bilateral trade deals. It would seek to engage the EU selectively, issue by issue. On defence, Britain would maintain global deployments in the Gulf, Horn of Africa and the Indo-Pacific. It would use AUKUS and other minilateral formats to remain globally relevant. It would invest in maritime projection, space, cyber and special forces.

This approach starts from the idea that there are many democratic countries that, like the UK, relied on the rules-based order and had similar assumptions about the world but now find themselves under pressure from both China and America. They are trying to work out what they can preserve from the rules-based order and are looking for scale in response to these pressures, which is proving difficult without the US as an organiser.

Britain has a seat on the table at the G20, G7 and United Nations Security Council (UNSC), a far-flung network of embassies and consulates, and good relations with countries like Canada, Australia, Japan and South Korea. It would make sense to work together to avoid a prisoner's dilemma on trade, collectively push back on US tariffs and create joint ways of procuring critical raw materials to counter Chinese economic coercion. Britain's membership in the CPTPP would allow it to act as a bridge between the EU and the Indo-Pacific. Britain could also build on its 'reset with the global south' to craft new post-colonial relationships with countries like India, South Africa, Kenya, Angola and Nigeria (Chappell et al 2025). It would use development finance and British Investment Partnerships as influence tools. The goal would be to build economic resilience through global supply-chain partnerships rather than regional blocs. It would seek to leverage its expertise in tech governance, AI regulation and digital standards through global forums.

A Global Britain 2.0 approach would be less directly concerned with security, but could coordinate on sanctions against Russia, even in the absence of the US. Countries like South Korea remain key arms providers for both Ukraine and European allies, while Canada is a NATO ally. The UK could choose to continue

treating Ukraine as a critical issue or pivot to providing diplomatic support and equipment for Poland and the Baltic states without making this the centrepiece of British foreign policy. Unlike Global Britain 1.0, Global Britain 2.0 would not be anti-European. But Europe would be one pillar among several rather than the central flank of British foreign policy.

This model carries risks. It requires public support for aid, trade openness and continued global deployments. By looking at the whole globe there is a real danger of strategic overstretch and incoherence. Most importantly, Britain remains a prisoner of its geography. The fact that Canada and Japan aren't neighbours makes working with them less relevant on migration and security. Ukraine will always matter more to the UK than it does to Australia and Korea. Geography doesn't rule out trade and economic cooperation, but it is a huge impediment: Britain's total trade with CPTPP countries is still eight times less than with the EU.[1] Moreover, solidarity within such a diverse grouping is likely to prove rather thin, as a lack of institutional glue means that countries will be tempted to cut their own deals with Washington and Beijing.

MODEL 3: PIVOT TO EUROPE

The third model is to embed the UK into Europe's new security and economic order. The strategic goal would be to anchor it inside a wider European system of security, economic resilience and industrial cooperation. If fully committed, the UK could hope to become a principal architect of Europe's defence renaissance. It would also allow the British government to avoid isolation in a world of blocs, and to rebuild influence over decisions affecting UK prosperity and safety. The starting point is a recognition that Europe faces a generational challenge from Russian aggression and that US retrenchment accelerates the need for a European security pillar. But it also sees opportunities in Europe's green transition, economic security agenda and defence-industrial expansion.

The UK still thinks of the EU as a liberalising club, when in reality it is rapidly evolving into a security union. Issues of institutional purity and 'cherry picking' matter much less today, while ones that were barely discussed in 2016 – such as security cooperation – now dominate the bloc's geopolitical debate. The existence of neutral and hostile member states *within* the EU means that alternative models to the EU27 are being considered, including ones which give the UK a seat at the table. Britain will not rejoin the EU any time soon – and that would need to be agreed in a referendum – but there are many options to develop a much closer relationship that are compatible with the 2016 referendum result. The politics of migration mean that any government will be wary of rejoining the single market but, if the British government upped the stakes, it could pursue a much more ambitious reset.

On security, the first challenge will be to establish a more European NATO, through different bilateral and minilateral arrangements. The EU is not an equivalent military actor. But it offers a more holistic security model, which joins up economic security, energy security and resilience in ways that the transatlantic alliance doesn't. There is scope to establish a UK–EU economic security agreement which could aim to build Europe-wide resilience against economic coercion. The UK could try to take joint positions with the EU on China, climate, AI, migration and trade; work with the EU to shape the rules of digital and green technologies; and co-ordinate on sanctions, supply chains, critical minerals and energy security. The UK's lack of fiscal headroom will make it difficult to fulfil its 5 per cent defence spending pledge. But, as David Miliband

1 UK trade with CPTPP countries was worth £118 billion in 2022. EU-UK trade was valued at £812 billion in 2024.

observes, it could try hard to work with Europeans on a joint procurement mechanism to offset those costs (Miliband 2025).

Regarding growth, the EU remains the UK's biggest market by far, and leaving the bloc has cost the country at least 5 per cent of its GDP (Goldman Sachs UK 2024). The government's attempts to court growth from different areas have not come close to mitigating the losses of Brexit. For example, the government estimates that the impact of the May 2025 reset deal including the Sanitary and Phytosanitary measures agreement (SPS) and cooperation on energy will boost UK GDP by about 0.3 per cent by 2040 (Prime Minister's Office 2025). That is why it is clearly worth working harder to find a closer relationship. Substantially greater benefits would be available from rejoining the Customs Union, let alone the single market. Although the government's reset makes a limited difference on its own, it has created a valuable precedent of allowing the UK to align its regulations with the EU on electricity and energy. This creates the possibility for a different relationship in other areas.

On migration, the logic is straightforward: 100 per cent of small-boat arrivals come via the EU. Helping the EU police its own border would generate goodwill and simultaneously make migration flows to the UK more manageable.

Only a minority of British voters want to relitigate the Brexit debate. But polling by the European Council on Foreign Relations (ECFR) has shown that if the debate on closer relations with the EU is framed around equipping ourselves for the future, people on all sides of the political spectrum are in favour (Leonard 2024).

There are also risks and drawbacks to this model. The first is getting voters' consent within the UK and in European countries for an ambitious reset. As the former British ambassador to the EU Ivan Rogers has explained, at a time of war and trade disputes, the project of working on a technical SPS deal with the UK is not a top priority for any EU country (Rogers 2025). The negotiations around the UK's accession to SAFE are a warning sign that not everyone in Europe is keen on closer ties to the UK. The political situation in the UK, with Reform leading in the polls, also gives European allies room for pause (the opposite is also true, with the National Rally (RN) leading the race for the next presidential election in France). A second factor to consider is that if it does not rejoin the EU, the UK would have to accept becoming a rule-taker if it assumes greater alignment with EU norms. The UK has wider interests and a more complicated economy than Norway, and it is used to having a say. Another drawback is that alignment with the EU on regulations, standards and trade would preclude side deals with other players – some of which, as on AI, have been quite successful – and could draw the ire of Trump and Xi.

Each model involves trade-offs. British policy will likely reflect elements of all three. But the models provide a clear direction of travel and a means of calibrating the energy invested in potential relationships, and some of the trade-offs. They provide a lodestar to move towards, perhaps not in a single year, but over a 'decade of national renewal'.

So, how well do these three pure strategies fare against current reality? 'A Modern Special Relationship' offers immediate political and military reassurance from the US, privileged access to US tech and intelligence, and a clear, familiar diplomatic architecture (Five Eyes, NATO primacy). But it offers very little on migration and growth. The Trump presidency increases policy volatility and makes deep reliance risky, while in the longer term, US priorities may diverge sharply from Europe's. Aligning the UK with Washington is likely to impede trust and cooperation with European partners. While it is attractive for security guarantees (which would in any case apply to Europe collectively,

and not just to the UK), it is insufficient and risky as a sole strategy, given US political volatility and Europe's evolving security autonomy.

TABLE 2.2: STRIKING THE BALANCE: THE SECURITY, ECONOMY AND MIGRATION IMPLICATIONS OF OUR THREE STRATEGIES

	Security	Growth	Migration
Special relationship	Unmatched access to US defence, intelligence and AI capabilities; strategic enablers impossible to replace.	AI partnership offers limited investment in the grand scheme of things; dubious value of low tariff rates.	Limited direct leverage.
Global Britain 2.0	Shared sanctions and economic security frameworks, and limited security coordination with Canada, Japan, Korea and Australia; limited coordination with EU	Broader trade options; scope for joint procurement of critical raw materials and coordinated pushback on tariffs.	Very limited scope for cooperation.
EESA	Integrated economic and energy security; joint procurement lowers costs; direct influence on Europe's emerging security order.	Biggest market by far; closer alignment could recover up to several percentage points of GDP; improved resilience through EU supply-chain frameworks. But relative weakness on AI.	Strongest of all models: direct effect on small-boat flows; UK influence on EU border management; goodwill for returns agreements.

Source: Author's analysis

The idea of 'Global Britain 2.0' and its distributed, multi-regional partnerships offers the prospect of diversified political and economic relations. It fits the UK's strengths in services, finance and soft power, and has the potential to attract inward investment. However, its global reach risks strategic overstretch, offers limited leverage on core European security problems, and does not move the dial on growth or migration. A network of loose global relationships cannot substitute for deep regional institutional ties in Europe. It will struggle to shape European rulemaking, which affects UK businesses. Global Britain may be valuable as a complementary pillar, but alone it leaves a critical geographic blind spot – Europe – where existential security threats are concentrated.

Because Europe is the primary theatre of strategic risk, and because the UK already sits inside Europe's industrial and geographic ecosystem, a Europe-anchored strategy – combined with a durable US alliance and selective global partnerships – best fits the UK's present geopolitical situation. However, it must be pursued pragmatically because institutional frictions remain, and the politics are still very sensitive.

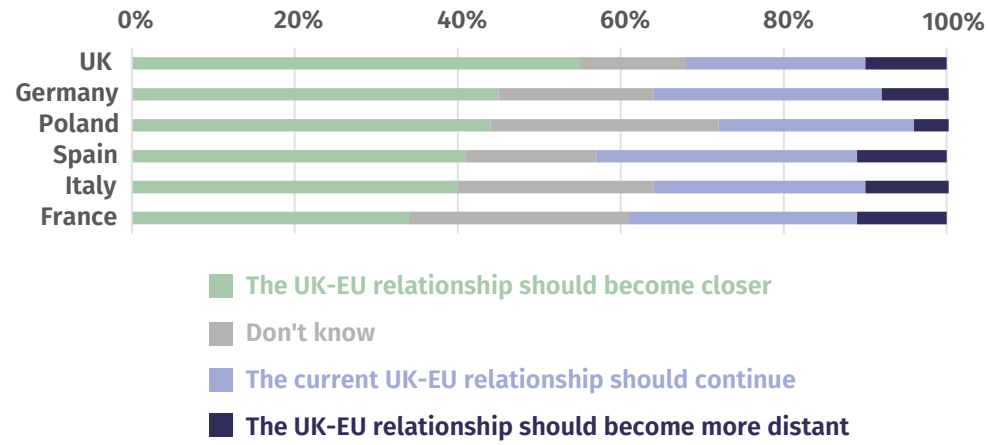
3.
PUBLIC OPINION AND FOREIGN POLICY

Is there a consensus for Britain to have a Europe-facing grand strategy? It is right to question whether a politics of 'national preference' can be beaten by an alternative strategy of 'international cooperation'. The solution, therefore, must be to challenge a pessimistic, 'blood and soil', exclusive version of nationalism with a more optimistic, civic, inclusive nationalism (Patel and Garland 2025). Part of this should be to offer an alternative definition of the national interest. Against a quest for 'splendid isolation', progressives should define the national interest as the interests of a median family in the United Kingdom.

Putin's all-out assault on Ukraine, combined with the second Trump presidency, has dramatically altered the backdrop of public opinion on international politics. A large ECFR survey carried out after the US election in six European countries shows a clear trend: voters generally favour a closer EU–UK partnership (Leonard 2024).

FIGURE 3.1: BREXIT IS THAWING

Public attitudes on UK-EU relations across six countries

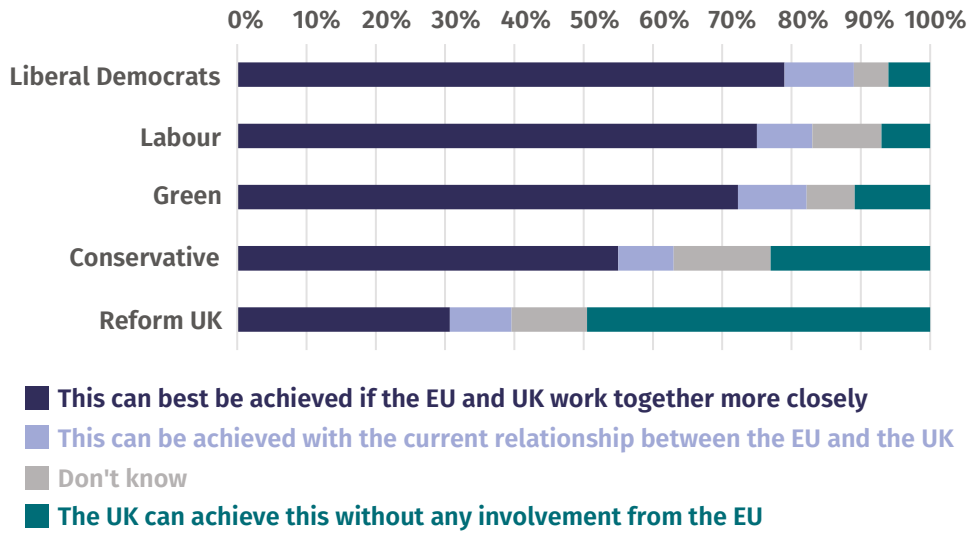


Source: public opinion survey conducted by YouGov and Datapraxis for ECFR over 11–24 November 2024

Cooperating with the EU on major challenges enjoys support across the political spectrum, including among many Conservatives, especially on migration.

FIGURE 3.2: MIGRATION AND EUROPE

British public attitudes, by voting intention, on EU relations and migration



Ibid

British voters show little appetite for aligning themselves with the American president's positions on China, Ukraine or other strategic issues. Increasingly, the UK public look towards Europe rather than the US, not only on economics and migration but also on security. When asked who Britain should prioritise in its foreign relations, 58 per cent want the UK to give priority to Europe, while only 14 per cent think Washington should come first.

FIGURE 3.3: TOWARDS EUROPE, AWAY FROM THE US?

British public attitudes towards the UK's relationships with the European Union and the US

The UK government should prioritise the relationship with the US

Don't know

Neither of these

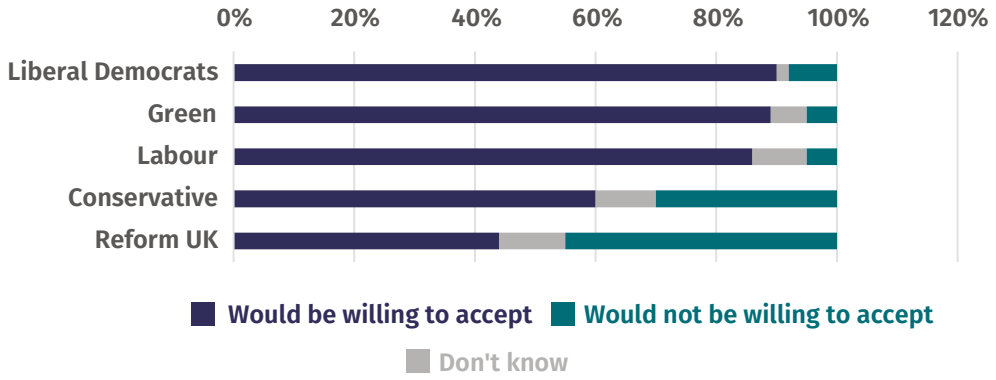
The UK government should prioritise the relationship with our European neighbours

Source: Ibid

Perhaps the most striking result is that voters are far less concerned about Labour's self-imposed negotiating red lines than the government itself is. Remarkably, a large majority of the public would now accept reinstating reciprocal freedom of movement. One possible explanation is that soaring net migration after 2021 prompted many to conclude that Brexit has not curbed immigration.

FIGURE 3.4: CHANGING ATTITUDES ON FREE MOVEMENT

British public attitudes, by voting intention, on EU free movement in exchange for special access to the European market



Source: Ibid

4. A NEW APPROACH: OUR NATION, OUR CONTINENT, OUR WORLD

As Britain looks towards a decade of national renewal, it needs a strategy to rejuventate its domestic politics, stimulate its economy and achieve its global goals. A new British grand strategy will rest on three pillars: recasting the relationship with Europe, de-risking from the US and China, and reinventing the machinery of government at home. It could do worse than channel the goals of the quintessentially British 1970s punk band, the Clash and seek a 'Safe European Home'.

4.1 RECASTING THE EUROPEAN RELATIONSHIP

The EU is becoming a security-led project – in which the UK must embed itself. Ukraine is the hinge issue around which the entire European security order is being rebuilt. If Europeans fail in Ukraine, the political and strategic damage will shape the continent for decades.

Rejoining the EU is not currently on the table – nor does it need to be at this stage. But in a world increasingly organised into economic and security blocs, Britain must ensure it is seen as part of the European one. And even if the government chooses to maintain its red lines for this parliament, it has a duty to start a discussion in 2026 about its 2029 manifesto for post-2029 negotiations. As Sunder Katwala has pointed out, it could ditch the red lines and seek a 'green light' mandate to explore all options (with a clear commitment that re-joining the EU would only be possible with a referendum).

The UK's most powerful offer today is of being a security provider. By linking defence with economic security, London can shape a caucus of pro-UK states inside the EU. A more European strategy requires the UK to rethink – not sever – its relationship with Washington. Britain must de-risk its dependence on the US. The current metaphor of the UK as 'America's bridge to Europe' is not helpful, making it sound as if the UK has left Europe, and it deprives the country of agency. The goal should be to work with other European countries to build a bridge away from dependence, towards an autonomous but friendly position with the US. Starmer's activism on Ukraine and the coalition of the willing shows what is possible, but it needs a larger strategic frame.

The UK has a narrow window to shape a European security order in flux. Doing so demands real resources, sustained diplomatic effort and a coalition-based approach across NATO, European partners and the wider EU system. If Britain rises to the challenge, it can help to build a new European order. Although the UK will always have an Anglo-US defence relationship, it is already structurally part of the European defence industrial base, with decades of industrial cooperation unmatched by other non-EU partners. This gives the UK a unique foundation on which to build. At the same time, the European Commission's instinct to centralise defence policy is generating friction inside Europe. This gives the UK an opening to deepen cooperation outside EU-27 formats.

The UK's first strategic task is to help build a more European NATO capable of deterring and, if necessary, confronting Russian aggression. This means Europeans taking more political and military leadership. It also means developing a decade-long 'full force package' plan that combines short-term needs to rebuild readiness and support Ukraine with longer-term moves to build combat support, enablers and other capabilities currently supplied mainly by the US. The UK should set out a timetable to meet the new 3.5 per cent defence spending target and lay out innovative ideas for defence financing such as the long-term loans in the European Defence Mechanism. By using the May 2025 Security and Defence Partnership as the baseline for deeper operational and industrial cooperation, the government should prioritise joint capability projects and cooperate on strategic enablers that reduce dependence on the US. It could align procurement cycles with key European partners (France, Germany, Poland, Sweden). One of the most resonant steps a British government could take would be to offer a consultation process with key capitals – such as Berlin and Warsaw – to explore a broader European role for the UK's nuclear deterrent.

When it comes to growth, the long-term goal should be to move towards a European Economic Security Area that complements its security role. There is scope to build on the ideas of 'dynamic alignment' in the EU reset around energy and electricity markets, expanding them to other areas of economic policy. This could be complemented by exploring joining a customs union. The UK government should commission a series of reports and work with industry groups to advance this agenda and think about eventually promoting an 'economic security union' that links industrial, trade and security policies, building joint resilience on raw materials, supply chains, energy cut-offs, tariff wars and Chinese coercion.

Post-Brexit strategy must be underpinned by a different method of order-building, which is less about treaties and more about ad hoc coalitions and trial and error. Such an approach is made easier by the constellation of power in the bloc currently. Hungary makes the EU27 a quite difficult format to work with. The Nordic and Baltic leaders mistrust the French and fear US troop withdrawals. The French are nervous about what German defence spending will mean for their relative power within the bloc.

The UK has a chance to play a powerful shaping role in Europe by reassuring eastern and northern European countries, leaning into the developing nuclear conversations, working with select partners on specific issues, identifying opportunities to work with Ursula von der Leyen, and thinking creatively about defence financing.

The key will be to look beyond the traditional Paris–Berlin axis and its formal negotiations with the EU. The UK's diplomatic advantage lies in building coalitions with Nordic, Baltic and Central European states. This means deepening cooperation with selected states on Russia, China, migration, technology and energy security. Where appropriate, the UK should support smaller states with targeted capabilities (for example, drone defence for Belgium). The ultimate goal is to create a political 'superstructure' for Europe's defence architecture – for example, adding a political dimension to the coalition of the willing, seeking membership in the Nordic-Baltic Eight (NB8) or creating a foreign ministers' Joint Expeditionary Force(JEF) track that covers infrastructure, supply chains, migration and societal resilience.

Such coalitions are easier because of today's unusual intra-EU dynamics. To this end, the next National Security Strategy should include consultation with European experts. Joint ministerial trips to countries such as Moldova or places like Gaza should become de rigueur. The UK should also aim to secure a panel of European foreign ministers at next year's leadership conference, and coalesce bilateral conferences like Königswinter and Pontignano into an annual security

and resilience dialogue held in the UK, at which the prime minister could make a major intervention on European security. Soft power must also be redefined: rather than focussing on 'soft issues' or culture in a vacuum, the UK should develop more effective strategies of political coalition building in Europe that are more similar to the tactics and strategies deployed by embassies in Washington, which work in coordination with Congress, think tanks and the media to shape debates and mobilise allies.

Doing all of the above requires a new way of talking about Europe, away from the three Rs of rejoin, remain and red lines. This isn't about reopening past Brexit battles. Rather, it's about acting on what has become a bipartisan consensus: we may have left the EU, but we haven't left Europe. The government urgently needs to launch an ambitious and open-minded debate about what it needs for the 2030s.

4.2 DE-RISKING RELATIONS WITH THE US AND CHINA WITH EUROPE

Britain faces the prospect of blackmail from the two most important powers in the world: the US and China. It wants the US engaged for as long as possible and must carefully manage its relationship with Washington. But in 5, 10 or 20 years, it will matter a lot less in Washington's calculations. Trump embodies both a transactional instinct (as a dealmaker who enjoys the pageantry of a royal visit) and that of a political revolutionary bent on undermining the institutions that define Western liberalism.

All American allies are facing the same dilemma of trying to avoid the worst outcomes and manage a deep security dependence while moving towards greater independence. The challenge for UK policy makers is to recognise that the 'special relationship' is becoming ever less special and to chart out a gradual transition to less dependence, as Canada, Australia or Germany are already doing.

Meanwhile, Britain must be more clear-eyed about both the advantages and disadvantages of dealing with China. It is essential to maintain channels with one of the most important countries in the world. But it is also important to understand that China's slowing growth, aggressive export promotion and refusal to shift to domestic consumption mean that the Chinese market is shrinking rather than growing for Western countries. Moreover, China has already shown its willingness to use economic coercion, whether through rare earths, magnets or pressure on key supply chains.

One obvious way of addressing this challenge collectively would have been 'allied scale': ringfencing priority industrial sectors among allies with roughly common defensive approaches on trade and economic security to limit China's presence, and taking joint measures to make it market-viable to reduce dependencies on China in several critical areas. But there is a US-shaped hole in the centre of any allied approach. Britain risks being caught between American and European attempts to deal with the new China shock.

There is a lot of activity in Brussels around solving the problem. They are investigating how to stretch legal and WTO compliance beyond the traditional trade defence measures. They are exploring changes to procurement rules, cyber restrictions, local content conditions and stockpiling requirements, and adding more extensive conditions to Chinese investments in Europe. The UK has a strategic interest in encouraging European counterparts to adopt an approach that includes like-minded states, rather than a 'buy European' approach that closes the European market to the UK. A mid-sized country like the UK can't perform economically without being connected to the US

and China. But it needs to be more intentional about how it manages these relationships, benefits from them, and guarantees resilience against blackmail while maintaining other options.

The UK has strong support for multilateralism, out of conviction but also out of self-interest. However, if it gets trapped into a defensive posture that is overly focussed on working through these organisations, it will marginalise itself. UK policy should leverage whatever assets the country has to solve its own problems. It should follow a Chinese medicine approach, looking for where the energy and momentum is at any given moment.

This will require the UK to create or participate in minilateral and plurilateral formats tailored to specific global problems – such as critical-mineral partnerships, technology compacts, coalitions for setting international standards, new infrastructure financing platforms, and innovative models for conflict resolution. This approach demands treating emerging economies as genuine collaborators, not simply as sources of raw materials or arenas for geopolitical competition. The UK will, by default, place particular emphasis on partners like Australia, Canada, Japan and South Korea, countries that experience economic pressure from both China and the US (a kind of 'anxious allies' caucus'). But Britain should also explore options for working with non-traditional groupings and states that have not historically been its closest allies. London has already deepened ties with the UAE, Qatar, Turkey and India. The task now is to extend these relationships into new domains such as advanced technology.

Many countries want to work with partners like the UK. But if the UK is seen as merely propping up the status quo and investing only in the institutions where it is overrepresented, it will look self-serving and irrelevant. The key, then, is not to start with the premise of what partners we want, but simply *what* we want.

4.3 REINVENTING THE MACHINERY OF GOVERNMENT

Realising Britain's ambition will require the FCDO to become more than just a diplomatic service. This will involve drawing policy lessons, building new alliances, and appointing ambassadors or envoys tasked with pulling together cross-government strategies in key areas – from securing rare earths to addressing systemic vulnerabilities. The FCDO must work hand in glove with domestic government departments to craft a whole-of-government international agenda. This will require moving beyond its current diplomatic role to one that sources the best ideas from abroad and builds new coalitions. I will explore four key areas: security, growth, migration and community cohesion.

A key part of the approach will be rebuilding diplomatic capacity in Europe. That would mean rebalancing FCDO staffing toward Brussels, Paris, Berlin, Warsaw and northern European capitals. The government should create a European Affairs Directorate in the cabinet office to coordinate defence, economic security, energy and regulatory diplomacy across Whitehall. It should train a new cohort of officials specialising in European institutions and regulatory diplomacy.

On security, Britain needs to develop a much more ambitious plan for national resilience at a time of cyber attacks, energy cut-offs and disinformation campaigns. There are currently a number of disparate government strategies – but what could be unique about a Labour government is its ability to 'socialise risk'. The government should develop a series of plans for enhancing the preparedness of our society for external shocks. The government doesn't currently have the tools – or even the data – to make our foreign policy respond to the UK's critical national vulnerabilities. We have been ineffective at making the political argument

to prioritise economic security and resilience partly because we don't have the empirical base to assess our vulnerability through mapping supply chains, technology dependency, critical infrastructure exposure or financial flows.

On growth, Britain will also need a new strategy which accepts that the days of gung ho free trade are behind us. Britain must recast its foreign policy behind supporting the 'modern industrial strategy'. That needs to be framed through an outward-looking lens – learning from and cooperating with international partners. Education and soft power must also be rethought. The crisis among American universities has created a fantastic opportunity for the UK to access previously unavailable talent.

On growth and trade, the UK should take a leaf out of Canada, New Zealand and Australia's book. All three have seamlessly integrated trade diplomacy into their foreign services. Instead of having hundreds of civil servants working on the Middle East, it would make more sense to have them work on trade or regulation. Ambassadors to key countries could be appointed specifically to leverage trade relationships, as Australia did when it appointed a former dairy industry executive as its ambassador to South Korea (Hartwich 2018). UK consulates could be redesigned to expand Britain's economic reach by prioritising key economic centres over political ones and filling them with trade experts. The FCDO's growth review also contained creative ideas about how the FCDO could embed staff in local authorities in the UK – and open missions closer to market places such as the German Länder, Chinese provinces or US growth centres like Texas. An economic growth and resilience agenda also means developing a different relationship with corporate Britain on the new security agenda on issues such as defence, energy and tech: companies are key to realising this agenda.

The debate around asylum and immigration should be seen not as a necessary evil, but as a political opportunity. Firm resolve on border control, especially small boats, is a necessary condition to get a political hearing. But unless this is embedded in a wider, credible centre-left framework, the approach will look tactical rather than principled. Useful lessons can be learned from centre-left governments in countries such as Denmark, Sweden, Australia and Canada (Leonard 2025).

Strong border measures should be accompanied by a clear argument that effective border management depends on international cooperation. That means working hand in hand with France to curb Channel crossings and using aid strategically to support returns where warranted – something made harder by past cuts to development spending. The Labour government's 'one-in-one-out' deal with France has begun to create the circumstances for a move to this model – coupled with deals such as that made with Iraq. The challenge now is to develop an entire division within the FCDO geared towards every step in the migration supply chain.

This could liberate the wider FCDO to pursue questions of strategy, rather than turning every question into a front in the migration debate. Instead of having a purely national debate about leaving the ECHR, the UK needs to think about how to work with European partners who are facing almost identical challenges.

Another pillar of a centre-left migration policy should be the assertion that patriotic pride stems from integration rather than ethnicity. This requires a route to citizenship for the sizeable share of foreign-born workers – including the 36 per cent of NHS doctors and a third of care workers – who keep essential services running (UK Parliament House of Commons Library 2025).

But the most important element of a centre-left renewed immigration system must be the idea that it should strengthen the prospects of the domestic

workforce. The UK will continue to need legal channels for skilled migrants. But these must sit alongside strong labour protections and renewed investment in training and apprenticeships. Emphasising international cooperation, integration and the UK's labour market needs can distinguish progressives from the narrower agenda of the far right.

The fourth big focus of a renewed FCDO should be community cohesion in an age of Un-order. One lesson from the tragedy in Gaza is that the government failed to communicate adequately with either Jewish or Muslim communities. An increasingly large number of foreign policy issues are intertwined with civic life in the UK. Traditionally, the FCDO has been suspicious of engaging communities on issues like the Middle East or Kashmir. The UK doesn't have much leverage on most of these conflicts, and they cause significant intra-community tensions. The FCDO should consider creating a new 'domestic division' to engage politically with different communities around foreign policy concerns. There are some precedents for this in Germany and France.

CONCLUSION

The world Britain faces today is more fluid and unpredictable than at any time since the end of the second world war. It would be dangerous to assume that it will soon revert to a more comfortable one, that Russia will abandon its expansionist aims or that Trump will be succeeded by an old-school Transatlanticist who will restore the rules-based order.

Amid Un-order, the UK must reject nostalgia for outdated ideologies, institutions and alliances. If it can create a domestic consensus for pragmatic engagement abroad, partner with an EU which is reinventing itself as a security project and set its relations with the world on a more realistic footing, it may just be able to shape future events rather than become a victim to them.

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