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After Dinner Speech at the 2025 KSA Dinner

Victory Services Club

The Geopolitical Situation March 2025

On Sunday August 2nd 1914, Lord Kitchener of Khartoum, the most famous general in the British empire at its zenith, was about to board the one o'clock steamer to Calais, on his way to Egypt as Consul General, after decades in India, Africa and the Middle East.

And yet, overnight, he was brought back, reluctantly, to London, to become the Secretary of State for War to oversee Britain's role in the greatest European conflict the World had seen.

What, you may ask, has this to do with the present geopolitical landscape, about which Simon Piggott here asked me speak this evening? It is certainly turbulent, but the circumstances are very different over a century later.

Now I don't suggest that history is about to repeat itself. But as the saying goes, while it may not repeat itself, it does often rhyme.

And I have been struck by the sense that the feelings Kitchener must have had, as he was forced to perform his rapid career pivot all those years ago, were not unlike what is now in the minds of today's European leaders as they are forced to switch, almost as swiftly, from a preoccupation with largely domestic matters - the economy, health, social programmes, education - to face the heightened defence and security challenges that now confront them in 2025.

Of course, much of this is not a new development, it has been building over time. When I was first asked to speak at your dinner, we already had Putin's invasion of Ukraine, with the earlier instances of Russian expansionism, Israel's war of survival against Hamas and the other Iranian proxies, the conflicts across Sub-Saharan Africa, the re-emergence of Great Power rivalry, as well as regional and ethnic strife, and the still present threat of Islamic terrorism. All of it destabilising the global order in varying degrees.

And in the United States Donald Trump had already shown in his first Presidency a maverick attitude to democracy, disdain for international institutions, and a belief that he could drive harder bargains and get better results for the American people in his deal making around the world, including with Europe.

But what has changed in the last few weeks and – which brings me back to Lord Kitchener – is the sheer **brutal speed** with which the arrival of Trumpworld 2 has created disruption and **turned on its head** our previous assumptions about the conduct of international affairs, the security of our Alliances and the cohesion of Western liberal democracies.

I've had a long career in defence, foreign policy and intelligence, almost 40 years, and I have seen the highs and lows of the Transatlantic partnership. But I have to say that this year it has fallen to its lowest point.

What we have been building for decades – the UN, IMF, WTO, NATO - the international system based on rules, institutions and respect for the sovereignty of all countries- has been thrown into the air- not just from attack by President Putin and President Xi, but now by President Trump and his team.

And for the Atlantic Alliance is the most serious crisis since 1945.

Let's recall some of what Trump and his administration have said and done in the short space of a few weeks to weaken trust and cohesion:

- The warning that the American military support that has effectively underpinned freedom since, well, since Kitchener's day in the First World war, should no longer be taken for granted;
- That the US security guarantee, backed by its nuclear deterrent, could be withdrawn from countries in NATO which in their eyes do not pull their full weight;
- The claim – laughable were it not so serious – that Europe's retreat from what JD Vance called "some of its most fundamental values" is more dangerous than any threat from Russia;
- Trump's decision to pick a fight with two NATO allies - Canada and Denmark over what is, in effect, their sovereignty and territorial integrity; in the words of the distinguished Canadian historian, Margaret MacMillan, Canada suddenly feels it faces an existential threat from its neighbour;

- Trump's bizarre proposals for the future of Gaza and the Palestinians;
- The protectionist economic policy and imposition of tariffs, which can only be harmful all round;
- The claim that the European Union which, he claims, was set up purposely to challenge the United States;
- And above all, the unilateral approach to Ukraine. While the end objective of achieving peace may eventually justify the means, Trump has certainly given the impression so far of siding with President Putin. We have seen:
 - Zelensky's humiliating ejection from that meeting in the White House;
 - the failure to publicly criticise Russia for their criminal and barbaric invasion;
 - apparently buying the Russian narrative that Ukraine is not really a country;
 - the spectacle of the US voting in the UN Security Council alongside Russia, North Korea and Belarus;
 - and the decision to withhold military and vital intelligence support in order to pressurise Zelensky into making damaging concessions ahead of any serious peace negotiations.

This saga has, of course yet to play out. At least discussions have started on how to end the war. We must hope that the efforts of the Prime Minister and other European leaders will also have a constructive influence. But the risk remains that Trump will continue to approach the issue as a transaction to be done with Russia, more like a businessman closing a bilateral deal, rather than as a statesman securing peace with justice for Ukraine. The world seems already to have shifted in Putin's favour, with potential knock-on effects for the wider security of Europe, or indeed the encouragement of other authoritarian regimes.

If this was just the result of one man's personal ambition, hubris or indeed, vindictiveness, it might be easier to treat it as a passing phase, with more normal service to be resumed when the Trump Presidency ends - with or without the Nobel Peace Prize.

But there are stronger and deeper trends at work in the United States which underpin the whole Make America Great Again Movement and their latest Project 25 and which make it a much more serious challenge. And I suggest it is important to understand where this is all coming from because that will inform the way we all have to come to terms with it.

In simple terms, the predicament we face comes from the perceived failure of traditional liberal democracy and economics to deliver change and prosperity to the lives of ordinary Americans.

Some of the resulting resentment stems from problems that are not confined to the US and are common to Europe as well – uncontrolled immigration, the inflow of narcotics, the effects of Covid, general inflation.

But there are also events that are specific to the American experience over the past 15 years.

During the financial crash of 2008 Americans saw their Government spend a trillion dollars to bail out the banks, but there was no similar financial support for the people who suffered the economic consequences and saw their jobs moving to cheap labour locations abroad. And this in a society without the welfare safety net that exists in Europe. I have had it from an authoritative source that President Bush regards this as one of the main failings of his administration and the root cause of the rise of the populism that brought Trump to power.

But there were also Bush's wars in Iraq and Afghanistan which committed America to long, costly, and largely unsuccessful engagements when the original promise was for a quick "in and out".

Much of the blame is also placed on President Obama for being seen to support the elites - the burgeoning high-tech community on the West Coast, the Establishment on the East Coast, while ignoring Middle America. Both Obama and Biden implemented what were seen as ultra-liberal or 'woke' cultural policies, which provoked widespread pushback and anger.

But the most worrying influence, which suggests that the Make America Great movement is not just a passing phase comes from JD Vance, the Vice President himself. And it is based on a sustained ideology. In Vance's world, America's traditional support for the rules-based international order has led to the misapplication of US power abroad and the decline of American economic health and cultural strength at home. Globalisation, he argues, has enriched the global elites at the expense of ordinary people. Burdens have not been shared fairly, including with European allies. The extension of liberal democracy and the free-market to places like China has succeeded not in creating the political

liberalisation that was envisaged but rather in producing a much more powerful economic and military competitor.

Whether this radical ideology will continue to dominate US policy remains to be seen. Trump himself is nothing if not unpredictable. And there may well be mounting opposition within the US itself, both from Congress and more broadly when some of the economic and political measures begin to bite.

But the risks for the NATO and Alliance cohesion are evident, as was seen from Vance's remarks at the Munich Security Conference last month; and from the revelations this week about the attitude of Trump Cabinet members towards Europe in the leaked messages on airstrikes against the Houthis in Yemen.

So, to conclude, what's to be done about all this. What should our position be?

First, I suggest we have to stand up for Truth and Reality in the face of bullying and misrepresentation. So many of the Trump policy positions are based on false evidence and assumptions – about such things as Putin's true nature and ambitions; about the health and robustness of European democracies, the economic damage to be done by tariff barriers; and the value of the Western Alliance for all members, including the United States. Of course, our leaders and politicians may have to be more diplomatic and circumspect in their dealings. They have much at stake in the relationship with the Trump administration. For the UK it's not just economic, it's also all those other ties, most crucially in intelligence and the nuclear deterrent. But for ordinary citizens, journalists, media commentators it is a different matter and it is right and necessary to speak out and challenge.

Secondly, however bad this is, we should not, and cannot in our own interests, give up on the United States. There is no point in making even worse this transatlantic crisis of mutual mistrust. When Europe considers the alternative of self-reliance, for which it not yet equipped, and in a world where authoritarian states are on the increase, it becomes clear that the best way forward is to reinforce awareness – on both sides of the Atlantic - that we still need each other, based on fundamentally shared values.

But thirdly – and this is where Kitchener comes back into our picture - we do need above all to transform our defence capabilities and more general national resilience. When Kitchener made his overnight transformation from Colonial administrator to Secretary of State for War he warned the military optimists -

who predicted it would all be over by Christmas -that this would instead be at least a three-year struggle, calling for massive increases in manpower and unprecedented levels of industrial effort.

Today our position is not all that different. In the Prime Minister's own words "This is a once in a generation moment for the security of Europe and we will step up to the task".

And, one might add, we need to do so for two reasons. First, **demonstrating** to the US that Europe will indeed carry its fair share of the security burden will provide the best chance of regaining trust and restoring that US vital commitment. But secondly, if in the worst-case analysis, this recoupling is not achieved and the US continues to pursue a policy of burden-shedding rather than burden sharing, we shall be better placed to stand up for ourselves.

So far, the signs have been moderately encouraging. In the UK, with our Prime Minister leading the effort to form a coalition of the willing for peacekeeping in Ukraine (though we may be too late to have significant influence over what happens there) but with European leaders, notably Germany pledging significant increases in defence budgets as well as France, and the EU creating a new special defence fund.

I am one of those optimists who still hope that the fundamental US objective is to goad Europe into what they regard as a proper partner as opposed to a freeloader – rather than a progressive attempt to divide the world into spheres of influence on almost C19th lines controlled by the US, China and Russia, respectively and letting Europe go hang. But the evidence so far shows that this is by no means assured.

So, to return again to my Kitchener analogy, the implications of us 'stepping up to the task' the Prime Minister puts it, has to go far beyond the simple objective of raising the UK's own defence budget by two thirds of one percent of GDP by the end of the decade. This cannot be a matter of quick fixes or minor budgetary adjustments. It will require much higher spending on defence and other policies, both here and in Europe to create more resilient countries. That includes, for example, investing in more companies with advanced technologies, developing new concepts of national service and reserves, and, more broadly, in the words of **William Hague** in a recent article in the Times: "creating a new **mindset** in which a new generation becomes willing to fight for their country and know they have something to fight for".

This is a massive challenge especially given the result of the recent attitude survey among young people about their support for this country and readiness to defend it. Not to with our current fiscal and economic predicament.

And Lord Hague does not have quite the imperious bearing, or the pediment moustache, to compete head to head with Lord Kitchener as all-time poster boy for national mobilisation.

But we can be pretty sure that that noble Earl, gazing down from his cloud, would heartily approve of Hague's analysis and his 21st century rallying call.

I don't suggest we are heading for World War Three, but it looks like it's going to be a bumpy ride. And it's clear, as I look around this room, that this country does indeed need all of you.

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