



International Relations and Defence Committee

Corrected oral evidence: The UK's future relationship with the US

Wednesday 28 January 2026

11.30 am

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Members present: Lord Robertson of Port Ellen (The Chair); Lord Ahmad of Wimbledon; Lord Alderdice; Baroness Blackstone; Lord Bruce of Bennachie; Baroness Crawley; Lord Darroch of Kew; Lord De Mauley; Baroness Fraser of Craigmaddie; Lord Houghton of Richmond; Lord Lamont of Lerwick; Baroness Prashar.

Evidence Session No. 21

Heard in Public

Questions 227 - 234

Witnesses

I: Tara Varma, Managing Director, German Marshall Fund of the United States, Paris Office; Peter Rough, Senior Fellow and Director, Center on Europe and Eurasia, Hudson Institute.

Examination of witnesses

Tara Varma and Peter Rough.

Q227 **The Chair:** Thank you very much for joining us today. This is my first session in the chair of the International Relations and Defence Committee of the House of Lords. This is the 21st evidence session that the committee has had on the US-UK relationship. We are obviously very interested in the publication of the National Security Strategy by the United States, or even the National Defense Strategy, which has been published in the interim period. The session will be streamed live on Parliament TV and a transcript will be taken. The transcript will be sent to you for small corrections, if necessary. I remind members of the committee that if they have any interests pertinent to their questions to declare them when they first speak. I declare that I am a senior counsellor with the Cohen Group in Washington DC.

My first question to both of you is whether you believe that the National Security Strategy, as published, is a policy document from which government policy will flow. What key shifts are there in this policy that were not in previous iterations of the National Security Strategy? Mr Rough, do you want take that one first?

Peter Rough: Thank you, Lord Robertson. It is a distinct honour and pleasure to be with all of you. I will begin by saying, in tacit acknowledgement of the President's style, that the National Security Strategy states outright that it is not grounded in traditional political ideology but instead employs a form of flexible realism. The Under-Secretary of War, Elbridge Colby, landed in Korea yesterday for his first international travel and emphasised in a major address the concept of flexible realism.

The NSS covers rather Trumpian themes that I will say are distinct from the previous Government, the Biden Administration: the emphasis on the primacy of the nation state, that is the fundamental political unit; a focus on competence and merit as a rejoinder to wokism, as it has been called in the US; a tight policing of the US border and restrictionist immigration policy; burden shifting to allies; revitalising manufacturing as part of a pro-worker trade policy; and energy dominance rather than climate policy, which does not feature in the document. It also, dare I say it, almost downgrades the Middle East from a primary to a secondary theatre of US activity, critiques Europe's political and social trajectory and repeatedly emphasises diplomacy over interventionism. Notably, it leads with the western hemisphere in Asia, spelling an end to the Euro-Atlantic as the driving focus or starting point of US grand strategy, which has been the norm for decades.

As to the extent to which I expect the Administration to be guided or constrained by this document, which I understood to be the first part of your question, the US President sets American foreign policy. He will not feel bound to consult the NSS to find answers, but I think that the document reflects some of the instincts and thoughts within the

Administration. Strategy documents are generally important for giving direction and guidance to the bureaucracy while also helping sway policy debates in the interagency to one direction or another. It is also important as a signal to US allies—hence we are gathered here today—and adversaries alike about the trajectory of US foreign policy.

The Chair: You talked about flexible reality. Do you think it reflects a permanent change towards a more transactional view of the United States in the world?

Peter Rough: It is hard to say exactly whether some of these changes are enduring or not. Here we are, three years away from what you can describe as the next presidential election and the next major shift in US foreign policy, so it is not easy to say in particular what will be enduring and what will not be. I think the primary prism through which the US will be viewing the world, international competition and US foreign policy is the competition with China and Russia in the coming years. To the extent that, for example, a more traditional or even democracy-promotion agenda fits within that prism, it will feature. To the extent that it does not, it will not.

I think that a form of Jeffersonian soul, which is always lurking beneath the surface of American policy, is there and will at some point reassert itself in one form or another, but this is a bit more of a hard-headed, putting-it-on-the-nose sort of strategy. In that sense, it is unique and different, but to the extent that the US has lost some of the surfeit of power, some of the edge and lead that it has had over its competitors in recent decades, I would expect us to behave a bit more realist, I suppose, in the years to come.

The Chair: Thank you. Ms Varma, what is your answer to the question I posed?

Tara Varma: It is my honour as well to be part of this testimony. I am delighted to be here, even virtually. I just moved back to Paris from Washington DC a few weeks ago and I am very grateful for the time with you today.

I think it is a marked change, and not so much about the western hemisphere, which is mentioned in previous National Security Strategies. The focus on China and the Indo-Pacific is there, although I feel it is downgraded. It has certainly been downgraded in the way this Administration perceive how helpful allies can be in the region and the role that they might have. We heard Secretary Hegseth repeatedly ask Europeans to focus on their own neighbourhoods before they can do anything in the Indo-Pacific. I think the interconnectedness of the Euro-Atlantic and Indo-Pacific theatre is definitely put into question in this National Security Strategy.

To me, the area where there is definite novelty—and I think it is something that Europeans need to take quite seriously—is the whole section dedicated to, as it is written in the National Security Strategy,

"Promoting European Greatness". There you have quite an apt description of how the Administration see Europe. Contrary to what a lot of observers in Washington and elsewhere thought, there is no disinterest from the Administration in Europe. On the contrary, there is special interest in ensuring that the transatlantic relationship is maintained and continues, but on grounds quite different than the ones it was founded on. We are not defending liberal democracy, open societies, multilateralism or trade co-operation anymore. It is really about European countries being bound by some form of an ideological alignment with the Administration. That is quite important in the messages that we read in the NSS.

All this is written in black and white. There is an expectation, a *quid pro quo* almost, that for the Administration to remain engaged in European security, European member states will almost have to make a proof of loyalty to the Administration. There needs to be real ideological convergence on migration and anti-wokism, as Peter Rough mentioned earlier, but on trade as well, I think there is almost an expectation of vassalisation. That is the profound change that we see in this National Security Strategy. To me, that is really the ideological codification of actions taken by members of the Administration throughout 2025, and possibly in 2026 and 2027 in particular. I think it needs to be taken quite seriously.

Again, members of previous Administrations, whether Democratic or Republican, also tell me that they drafted National Security Strategies and that the President, and as Peter said earlier, in this specific case really the President, is the ultimate decision-maker. So, he does not have to be bound by this NSS. I think it provides a clear sense of the Administration's priorities, which are also to be taken seriously, particularly the focus on the western hemisphere, but we have also seen the US President be very active on the military and diplomatic front, with possibly strikes on Iran to come and the capture of Nicolás Maduro. We saw him quite active in the Iran-Israel conflict last year, so we are also seeing a President who, as I said, I do not think will feel bound by the limits and hierarchy and prioritisation that we see in the NSS. I think he will still want to be very active on Ukraine and Russia, certainly.

Q228 **Baroness Blackstone:** You touched on the question I want to ask, but will you elaborate a bit more on it? Could you tell us how the US Administration may be either constrained or indeed guided by this document and give us a few examples? We will start with you, Mr Rough.

Peter Rough: Thank you, Baroness. Again, I think that this is a very presidential-driven Administration. It is a bit of a banality to say as much, because every Administration has, at the top, under Article II, the executive foreign policy and defence competency, and the President is the ultimate decider. That was true for President Biden, it was true for Presidents before that, but I think in this Administration, the general assumption in Washington is that the President, with a close coterie of advisers, is really driving the decision-making train forward. This document is to give intellectual scaffolding for outside observers to try to think about what kind of features, dynamics and ideological leitmotifs

might be driving decision-making, but I do not think that they will be the dominant focus or that the President will take options off the table because the National Security Strategy says one thing or another.

To take the example that I mentioned earlier, and as Tara just described, we are in the midst of a heated debate and a great deal of suspense in Washington on what President Trump will decide on the Iran file. We have a massive military flotilla now that has steamed into the region; military assets were put in place. Donald Trump is the first President in American history who has struck Iran on Iranian soil, in Operation Midnight Hammer at the end of the 12-day war, yet the National Security Strategy has what I interpret almost as a ranking: the western hemisphere, the Indo-Pacific theatre, Europe and then the Middle East following in fourth place.

I served in the George W Bush White House. In the Administration of President Bush in the mid-2000s, the Middle East was top of the line, top of the agenda. I think that is suggestive of how events will dictate in part where the United States is active. Ultimately, as a global superpower, we are also being cast on the waves of events and have to respond as such. It was not Donald Trump who put people on the streets in Tehran but the brutality of the regime.

Then there are contingency operations that might arise, but if we look at the shape of where President Trump wants to take it, from the talk of stability on Russia-Ukraine—getting that to negotiations is clearly a point of focus—to the looming visit that President Trump has announced to Beijing in the spring, at the invitation of President Xi, where I think he too is looking to forge a constructive relationship, there are themes in this document that reflect that thinking, if the world were as the Americans want it to be.

Tara Varma: I can only second what Peter said. I think this document needs to be taken seriously. As I said, to me it is really the ideological codification of actions that have already been taken by the Administration. In terms of priorities, it is the western hemisphere first, China and the Indo-Pacific and then Russia. It is hard to speak about the NSS without mentioning the National Defense Strategy, also just released a few days ago. That is supposed to be the implementation at the Department of Defense of the National Security Strategy. There again we see this hierarchy, this prioritisation.

For Europeans, again it is a stark departure from the former National Defense Strategy published in 2022. In this new National Defense Strategy of 2026, Russia is perceived to be mostly a threat to Europe, not a global threat, so we see an evolution there. I do not think the President will feel constrained by the National Security Strategy, but again, it reflects his own priorities and the way he wants to act in the world. I think he will remain very active diplomatically and militarily. He has said so and I do not foresee any changes there. I think there is, of course, his personal willingness to obtain the Nobel Prize at some point, but these foreign policy issues are always issues that Presidents—not just in the

United States—tend to focus on when they face difficulties domestically. As we see growing tensions in the US, I would expect the President to be acting more on the military and diplomatic fronts.

The Chair: Tara, it is very difficult to hear you. Maybe if you could speak up a bit, we might hear better.

Tara Varma: Of course, apologies. I will try to speak up. I think the Middle East does not feature as a main priority in this National Security Strategy, yet the President is allowing himself the possibility or the option of going into the Middle East. He is the first President to hit Iran on its own soil, and of course strategies were drafted at some point and events tend to make these strategies evolve. As I said, we see a US President who is very active on the diplomatic and military fronts. I do not think he is ruling out any option and he is certainly not ruling out options in the western hemisphere. I would expect, confirming what we read in the National Security Strategy, more military action coming from the US Army in the immediate neighbourhood, possibly in Mexico and in Cuba as well.

Q229 **Lord Darroch of Kew:** I am interested in what you have said so far, but this National Security Strategy represents quite a shift from previous National Security Strategies, quite a change in a number of important aspects. Of course, the relationship between the UK and the US in the defence, security and intelligence field is hugely important to us. If you could put yourselves in the position of advising the British Government, what implications should we draw from this NSS on the prospects for our future defence collaboration with the United States, the future of intelligence sharing and these areas? Are there implications for us in this document?

As an add-on to that, in places the tone of it is quite strident and very critical of the other members of NATO and their contribution. In terms of our continuing dialogue and diplomatic relations with the US, do you think we should just continue as normal or should we be responding in a different way, given the tone of this document? Perhaps Peter can go first on this.

Peter Rough: Thank you. The NSS lists as an American strength, "A broad network of alliances, with treaty allies and partners in the world's most strategically important regions" and recognises that, "A world on fire, where wars come to our shores, is bad for American interests". It recognises that Europe is, "strategically and culturally vital to the United States". I think this is fertile ground, if you will, for UK-US diplomacy for the areas that the strategy spells out as crucial—combating mercantilist overcapacity, a worry also for the United Kingdom; maintaining a free and open South Pacific; and countering the PRC in the global South, all of which are explicitly mentioned in the strategy as areas where allied, burden-sharing co-operation is necessary. Moreover, by prioritising commercial ties and weapon sales to the countries of central, eastern and southern Europe as part of a broader approach of, "Enabling Europe to stand on its own feet and operate as a group of aligned sovereign

nations”, I think that the strategy implicitly recognises the possibility of continued Russian aggression and the need to prepare for it.

All that allows for strong US-UK co-operation along the lines that we have experienced for decades past. At the same time, I think that the US push for “strategic stability with Russia” could lead to some tensions and, as with any effort by the US to counteract “civilizational erasure”, by critiquing potentially incumbent political forces in the UK. While on the one hand there is enormous continuity—the Five Eyes relationship is valued greatly in Washington—and on the defence front, the Administration recognises the world as it is, on the other hand there are new directions that the White House would like to push out into that could cause some friction between the US and the UK.

The Chair: Tara, do you want to add anything?

Tara Varma: Thank you so much. I want to add that I think the two options that are presenting themselves to the UK are not mutually exclusive. I do not foresee the UK being able—or willing, for that matter—to cut ties with the US, particularly on the intelligence-sharing side through Five Eyes, but also deep co-ordination inside NATO on European security. Simultaneously, the UK will have to, like most middle powers, most European powers, diversify its portfolio of partners. The US has been quite clear in the National Security Strategy, but also in a series of speeches given by Secretary Hegseth, that there is an expectation for allies not only to bear more of the burden of ensuring Europe’s security but possibly to ensure Europe’s security on their own.

We have heard about a timeline to set up a European-led NATO directly from the highest echelons of the Administration. We have heard that there is an expectation, as the US has to focus on its homeland and the western hemisphere, the necessity is for allies—and that is true, by the way, for European and Asian allies of the US—to focus a lot more on their own defence, to spend more on their own defence, to organise better. I think all of this has been said explicitly, so I do not think it is an either/or situation. I do not think the UK or, for that matter, other European member states, could afford to cut off ties with the US. There is also the need to grapple with the reality of the US being less engaged in European security, but all the while being very engaged in Europe’s political processes.

I expect some kind of military disengagement by the US from Europe, a gradual one, in the months and years to come. Again, that has been said, and I think it will be organised, but while this military disengagement happens—and I keep saying it is going to happen gradually—what we are seeing, again very explicitly said in the National Security Strategy, is that there will be deep interest coming from the US Administration in political processes and election results in Europe with the hope that there could be some kind of export of some of the cultural wars happening in the US to Europe and European countries. I think that is quite clear. The willingness to come after institutions of the European Union is very explicit too. The UK must work with the US as it is and also work in

diversifying its partnerships through its diplomatic network. I think both of these options will have to happen simultaneously.

Q230 Baroness Fraser of Craigmaddie: My question is about the defence industries. The NSS prioritises economic security, supply chains and industrial independence. It talks about being pro the American worker, it talks about reshoring industrial capacity, and at the end the National Defense Strategy talks about supercharging the US defence industrial base. Given where we are and that we know that the US struggles, for example, to build ships in comparison to the rate at which China is able to build ships, and given also the talk in the National Defense Strategy about leveraging partnerships, where does that leave the US-UK trade relationships, particularly given the breadth and the depth of the ties of our defence industries? Tara Varma, do you want to start with that?

Tara Varma: Of course. What we are seeing inside the Administration—somehow the contradictions in this National Security Strategy reflect these internal discussions, which we see also sometimes displayed very much in the open—is that some members of the Administration would like to have a more stringent migration policy but still welcome the best scholars and workers from around the world to contribute to America’s wealth. On the other hand, we see others who are in favour of a narrower definition of reindustrialising the US and really focusing on US jobs and US workers. We think there are a number of people inside the Administration—possibly the President, first and foremost—who are looking at fostering partnerships and reinforcing existing partnerships, particularly the one with the UK, and looking at countries and partners and allies in particular from whom the US could get a comparative advantage. There are others who, as I said, would be more in favour of possibly putting an end to partnerships that have existed for decades.

I think today that as part of the trade deals that President Trump is negotiating around the world with allies—and with rivals sometimes—the idea of ensuring supply chains is absolutely key, ensuring that the US still has access to a market and does not get cut off, and that the US remains ahead in research and development. I think that is absolutely key. That is one element of the discussion and the UK-US trade deal that was signed last year is very much part of that. It is not surprising that it was one of the first trade deals that the Trump Administration wanted to sign. Again, there is very much a sense that the UK is a key ally and a key trading partner for the US, but the priority for the President remains the homeland, so you see also shifting priorities from time to time.

It is good that the trade deal was signed and there is some assurance there that the UK will remain a key partner for the US, but we might see changes there too. Some of the trade deals that have been negotiated are being reneged right now or they are considered obsolete and new deals are negotiated. I think this is another area where the UK will absolutely have to diversify its portfolio of partnerships and work with Asian allies in particular of the US, who will have better access to these shifts, and work with European allies too. That is one issue where the UK

will have to diversify. I think its relationship with the US is fairly safe for now but, as I said, it is for now. This is very much an evolving situation.

Baroness Fraser of Cragmaddie: Mr Rough, if the UK-US relationship in defence industries is safe for now, what are the implications, given what Ms Varma has said? If the US needs bullets in south-east Asia, what are the implications for the UK longer term in our defence industries' partnerships?

Peter Rough: First off, this is an area where I am rather encouraged by the work Deputy Secretary Feinberg has done at the Pentagon in the area of procurement reform and rethinking our defence industrial base. It might slip beneath the banner headlines of day-to-day politics, but it is the stuff of government that I think truly matters. This is also an area where the caricature at times of the NSS as being driven by a few highlight phrases or sections does not really match some of the substance.

For example, after listing a series of sins we can safely ascribe to the PRC, even though Beijing is not named, the strategy underscores the importance of allies "to counteract predatory economic practices and use our combined economic power to help safeguard our prime position in the world economy and ensure that allied economies do not become subordinate to any competing power". The document also begins with an emphasis on a "modern nuclear deterrent, plus next-generation missile defences" as well as not only defence industrial capacity but increasingly defence-related production capacity. That is in the commercial space, which can be useful and important to the Department of War and to our warfighters. I think UK industry can play an important role in all of that.

As to the question that was just asked about the threat of simultaneity, that is to say an emergency in the South Pacific, which then could lead to an emergency in Europe—in this case, presumably the Russians conclude that the US is distracted and sidelined—this is a scarcity problem, which is not to be avoided and which remains real and is real. I think back to our experience in World War II, where the US faced a similar simultaneity problem. It was attacked in December 1941 at Pearl Harbor, but rather than immediately moving out into the Pacific and engaging in the island-hopping campaign that maybe General MacArthur would have preferred, it put its primary focus on the European theatre. The response to simultaneity in that case was sequencing.

If there is a hot war in the Indo-Pacific that the US is engaged in and at the same time a conflict in Europe, if the bandwidth is not available for the US to engage in both conflicts at the same time, hard choices would have to be made, but by and large I think the US remains strongly behind its treaty commitments, in particular on the first island chain of the Indo-Pacific, as well as to the North Atlantic Treaty Organization. Both would be important, but it would be a matter of capacity, burden sharing and burden shifting as the US feels its way forward.

The Chair: Thank you. I will give the floor now to Field Marshal Lord

Houghton.

Q231 Lord Houghton of Richmond: There is no reason you should salute or be remotely scared. Mine is a very general question about how we achieve within what timeframe the more equitable burden-sharing of the defence of Europe and what American aspirations are for the role the United Kingdom might play in that. In our various interactions with American colleagues, we have picked up this sense of NATO moving to a new version 3.0, if you like, 1.0 being the NATO that successfully won the Cold War, then 2.0 the distraction of the forever wars, but now a requirement to fall in line with America's wish to shift some of the burden, certainly of the conventional deterrence of Russia within Europe, predominantly being delivered by the European pillar of NATO.

Given the trajectory of defence spending, the 5% target achieved at the Hague will not be achieved this side of 2035, and Russia is a threat now, it seems to be somewhat pedantic—and we are good self-critics—that the leadership role that the United Kingdom might play is something of a lived delusion within our current Government. Do you think that this will be quite an acrimonious transition? Do you think it can be achieved within the instruments of NATO? Do you think there will be a little bit more US presidential bullying? What do you think the nature of the ultimate reset at 3.0 might be? Might there be a conventional deterrence burden on the Europeans, with the Americans having residual strategic promises about strategic deterrents, the nuclear umbrella and things like that? Tara, would you like to have a bash at that and then Peter can fill in the gaps?

Tara Varma: Absolutely. I think I would be reassured if we were able to talk about burden shifting. Europeans have reached out to American colleagues to discuss a timeline. We have said it is not unreasonable to expect Europeans to take more charge of their own security. I am concerned by the risk of burden dumping, if you will allow me this unpleasant expression—the idea that the US might decide one day that Europe is not its military priority anymore and that it does not see a major threat to European security and, if it does, the burden of it absolutely lies on Europeans on European soil. That is part of my concern.

At the same time, I have seen coming from the UK a number of initiatives, and I am thinking about the conference with France last summer, which expanded nuclear military co-operation in a totally new and unprecedented way between two European countries. We had a very strong nuclear co-operation before, reinforced by the Lancaster House agreement, but I do feel what was signed last year was really a step in the right direction. It does not come as a replacement of US presence and the US security guarantee in Europe, but it is a welcome and necessary complement to it. This is typically an example of how Europeans can be more pragmatic, more realist and show that they are much more willing to take part in their own security. As Europeans, we realise that Russia is not just a mere threat; it poses a direct threat to Ukraine. It has been fighting the war with the support of China, among

other countries, Iran and North Korea, for the past four years and Russia has not lost.

What we have done as Europeans is to come together to try to support Ukraine as much as possible and we have seen that we were able to do for a country, not a member of NATO yet, much more than one would have thought possible four years ago. I think that we have the capacity, not just the political will and societal will, to ensure our own security but that we would have the financial will and capacity to do so as well. That is absolutely key.

I am saying all this because I think what is written in the National Security Strategy is to be taken quite seriously. I do not think there is an expectation, to be honest, of the US Administration that allies would help in key regions of interest for the US. The UK and other European countries have reached out to the US Administration to discuss co-ordination of actions to be taken in the Indo-Pacific region and these requests were met with a resounding no. What we are hearing from the US Administration—there are things that are written in the document, but the reality also matters—is that they do not want the Europeans in the Indo-Pacific as long as the Europeans are not able to defend themselves on their own continent. I think that is to be taken very seriously.

In the UK's case, as it is for France, we are resident nations of the Indo-Pacific region. It is absolutely the US's right to write and say what it wants our actions to be in that region. We have a legitimacy to be there and we will stay there, but we have to take all of this quite seriously. We have to determine our own interests. There will still be co-operation and co-ordination inside NATO as long as the US is there. I think that is absolutely key, but again it is key to be very clear-eyed about what is being presented to us in writing and in actions, which I think will only accelerate as we move forward in 2026.

It is hard not to mention the situation in Greenland when I think of where we were standing a week ago, with threats coming from the US Administration of some kind of action on Greenland. That could have been military invasion and annexation or an acquisition, and evidently the Trump Administration preferred that to have been an acquisition. That posed serious threats to the transatlantic alliance itself. We see these actions more now, which feel to me to very in line with declarations in paragraphs in the National Security Strategy. This fundamental profound change in the transatlantic relationship must be taken very seriously. I think that the US is feeling less engaged by its commitment to ensuring European security, but that does not mean the US is out. I want to nuance our understanding of what is happening today in Washington, that there is definitely an expectation for Europeans to do a lot more to fund their own defence, ultimately. We have to do that, from both a conventional and a new, clearer perspective. That is essential, especially considering the role the UK plays in European security.

Lord Houghton of Richmond: Thank you. Peter, do you want to précis your response?

Peter Rough: Yes, please. I want to start by saying I think it is less the Americans that are pushing these accelerated timelines and really the US reading of Chinese intentions in the South Pacific. Admiral Davidson made headlines just a few years ago by describing 2027 as a potential window within which there could be a moment of maximum danger, where the Chinese might go for broke on Taiwan. There have been a series of other general and flag officers who have made statements as well in recent years and now it barely raises eyebrows when US officials say that President Xi Jinping has ordered his troops to be ready to fight by 2027. Whether or not the order comes, we do not know, but just over the new year, in the last few days of 2025, there was a new Chinese exercise that essentially surrounded Taiwan in its entirety. The pace and scope of Chinese military operations in the Pacific, ever since Nancy Pelosi, then Speaker of the US House of Representatives, visited Taiwan in August of 2022, has really accelerated and has become the new norm. When the US talks about NATO and continental European and British forces offering or providing the predominant or the majority of conventional power in the alliance relatively soon, I think it is with an eye towards Asia less so than it is towards some sort of ideological vanity project, to be frank.

Having said that, the UK already does quite a bit, which we are rather grateful for on this side of the Atlantic, from the Joint Expeditionary Force to the framework nation concept of Estonia. The UK has been instrumental in the negotiations about what a post-ceasefire European presence in Ukraine might look like, including with UK forces on the ground, and of course the NATO Allied Maritime Command in Northwood matters a lot. At the nuclear deterrent level, I do not think that the sea-based nuclear deterrent or the Force de frappe are a suitable substitute for the United States and the American nuclear umbrella. In the argument Tara was making, she was describing the necessity of what might happen, but I think we are still some way away from that.

As to what the US will expect or drive at, I expect more cajoling, nudging and pushing and, at the same time, also an acknowledgement of what was accomplished. At Shangri-La last fall, Secretary Hegseth admonished some of the Asian allies to do more because it cannot just be the Europeans who will now be hit with new defence spending targets. There has been a watershed or a sea change on that issue. Where those capabilities are, I think we know the deficits, from ISR to precision-guided munitions, to tankers, to heavy lift and air defences in particular, as we have seen from the war in Ukraine. The areas are obvious. Where the investment needs to go is pretty clear. The question is whether or not the timelines that Europe is on will be sufficiently quick to match some of the emergency settings that we are experiencing elsewhere in the world.

Q232 Lord Ahmad of Wimbledon: I declare an interest as an adviser to the Arab Ambassadors Council. First of all, thank you both. I think that some of your responses have already formulated our thinking. Looking at the strategy and its emphasis, we have touched on the Indo-Pacific and the role of China. The previous Government of the United Kingdom and the current one both focused on the Indo-Pacific; leaving Europe and the

Brexit question were countered by this Indo-Pacific tilt, as it was called. Where do you think that leaves the strategic interests of the United Kingdom in that area? You talked, Peter, about existing agreements being respected. What is your perspective on issues of agreement such as AUKUS?

Peter Rough: From the point of view of the United States, I think that the NSS attempts to turn down the rhetorical dial on competition with the PRC, but it also foresees sustained military investments, including in next-generation technologies like artificial intelligence. At its best, if successfully carried out, this could be summarised as something akin to Teddy Roosevelt's "speak softly, but carry a big stick" strategic approach. In anticipation of President Trump's visit to Beijing this spring, as I have mentioned, we should expect this rapprochement track to continue.

The PRC's rare earth pressure campaign has raised several questions, as it reminds us of Russia's use of its energy weapon in the aftermath of its full-scale invasion of Ukraine. If it is China's strategy, will the US push for bilateral agreements with China or look to forge an allied front first? I think the diplomatic imbroglio around Diego Garcia testifies to how PRC-US competition can seep into the special relationship, just as Prime Minister Carney's trade deals announced on his recent trip to Beijing have impacted Ottawa's relations with Washington. What will Washington's response be if Beijing scoffs at the attempt at strategic stability? That is yet another factor. While I hate to be a witness who throws up more questions rather than answering them, I think that those are some of the conundrums that policymakers in Westminster and elsewhere will be grappling with in the months to come.

Lord Ahmad of Wimbledon: Thank you. Tara, picking up on that strand of thinking, Peter mentioned President Trump's upcoming visit to China. We have seen Prime Minister Carney announcing his deal and, as we speak, I believe Prime Minister Sir Keir Starmer has landed in China with 60-plus businesspeople and, interestingly, cultural representatives. From a United Kingdom perspective, with the recent events we have seen and not just ripples but pretty turbulent waters with the United States politically on a whole raft of issues, where do you think it puts the UK vis-à-vis China?

Tara Varma: It is not just Sir Keir Starmer who is going to China. My own President, Emmanuel Macron, is going there in a few days to meet President Xi Jinping. We are seeing live the consequences of the US questioning its security guarantee over Europe. The UK and other European countries—although it is not just European countries—that depend on the US security guarantee are scrambling to find other partners to work with. There is no other hegemon like the US that we could substitute for it. That is just the reality, but as countries move forward—I think that is true for the UK, which has had a complicated relationship with China—most will want to hedge and work with both the US and China simultaneously and other world powers as well. That is one of the difficulties that the Trump Administration are confronted with today. They are coercing Europeans, particularly economically, and

hoping that, because they are dependent on the security relationship, they will buy and accept it.

We are facing a very different situation. One of the knock-on effects of this new National Security Strategy that the US produced at the end of last year might be to try to push Europeans and other American allies into China's hands, which I guess would defeat the primary objective, which is to ensure this strategic competition with China. The NSS and the National Defense Strategy explicitly mention that they would prefer for this to be contained to economic competition. There is still the idea of deterrence by denial, but also a willingness to engage with the People's Liberation Army counterparts from the US side. We know that military contacts between the US and China were cut off, including all channels of communication, particularly after the balloon incident of February 2023. Apparently President Trump wants these discussions to resume. I am guessing that will form part of the discussions that he will have with counterparts when he meets President Xi Jinping.

For the UK, choices will have to be made because we also see China posing clear threats to Europe's security through its direct enabling of Russia's war in Ukraine. A number of European leaders have reached out to President Xi Jinping to ask him to lean on Vladimir Putin to put an end to the war and convince him that it is not in his interest. We have heard clearly from the Chinese side little to no willingness to get to Putin in such a way.

China also poses a threat to Europe's prosperity and the UK's prosperity. The overcapacity challenge is something Europeans absolutely need to face. We are seeing that a number of European countries are more directly impacted by this overcapacity challenge, but it will be an issue for all European countries and the European public must be made aware of it. We are hearing a lot about the US and its strategic interests, and of course in today's discussions it has been mentioned, but I feel in contrast that the China discussion is almost absent from the public debate. That is true in the UK and elsewhere.

I think we should not be tempted to fall into China's arms because we are worried and concerned about US actions and declarations, but be very clear-minded about having a clear China strategy economically and from a security perspective and be very clear about needing to adapt our US strategy and possibly to have a proper UK-US strategy.

Q233 Baroness Crawley: I am interested in the contradictions when it comes to the National Security Strategy, particularly in its approach to Europe. On the one hand, according to the strategy, we are doomed to economic decline, caused by national and transnational suffocation by regulations and all sorts of things, as well as facing civilisational erasure through our migration policies and not being European enough. On the other hand, the document states that European sectors, from manufacturing to technology to energy, are among the world's most robust. That is a very direct contradiction. In your view, what sits behind these contradictions and what are the implications for Europe and the UK?

Peter Rough: I think that, if you had an Administration official or spokesperson here describing the NSS, they would say that it describes a trajectory. While Europe still controls some of the dominant technologies and is still economically of huge importance, if it continues on its current path then, decades hence, it might be less relevant or lose some of its economic strength. That is how they would try to resolve the tension that you are describing.

In general, I think the ideological leitmotifs of the Administration run through the strategy, starting with immigration. Their aversion to globalism or even globalisation are in stark opposition to the ruling consensus in the West for the past several decades. I think they would point to the decline in traditional religiosity and demography in Europe as worrisome, just to name two indicators that alarm a lot of American conservatives. As you described it, the US economy outperforming Europe for years in certain areas has led to some gaps, especially in the most innovative industries, that could decide the future of the global economy. But I do not think it is that hard to impress upon you what is behind all this, because I think it is a very similar phenomenon to what spurred Brexit some 10 years ago. A similar political mindset, thought process and ideological footprint is in play here.

I interpret the implications of this more as a wake-up call of sorts. One could sit back and introspectively consider whether there is any truth to any of this, but I would not think of it as the start of an operational campaign by the United States. The occasional presidential social media post or remark aside, and the periodic gathering of US populists or national conservatives in Europe notwithstanding, I think European politics will rest in the hands of the Europeans. I do not think they are so fragile as to be dictated from Washington. I am not even sure that the United States commands an on-the-ground understanding of the nuances of politics in Europe to be able to make a demonstrable difference in favour of those forces that it is describing. While in the 1950s and 1960s, in the early Cold War period, the US moved heaven and earth to try to shape some of the trade unions in places like Marseilles to ensure that some of these countries did not fall into the hands of communism but remained social democracies, I do not think that that level of American engagement in European politics is likely in the coming three years for which this NSS will be relevant.

Baroness Crawley: Thank you. Tara, do you agree with that or have other aspects to add?

Tara Varma: I do not think that the Administration would see this as a contradiction. What we have heard from a number of officials from the Trump Administration is that they wrote this NSS out of love, and to quote directly, that they "care about Europe". I think over 40% of the American population is of European descent, and we have heard that they care more about Europe than Europeans themselves and want to ensure that Europe remains on the right track. I do not think they see this as a

contradiction. They feel that the trajectory Europe is now taking is the wrong one and they want to make sure that we get on the right path.

They are also interested in Europe's industry, absolutely, and particularly in the European Union. What we see in the National Security Strategy is love for Europe, not so much for the European Union. There is really a willingness to come after the digital and planning regulations in particular, but other regulations as well. I feel like I have heard about the EU regulation called the DMA DSA Act more in the US than I ever did when based in Europe, so that was interesting to me.

On the Administration's ability to act upon the electoral processes, I am a bit less optimistic than Peter. Last year, when Vice-President JD Vance went to the Munich Security Conference, he did not meet the German authorities but leaders of the far-right party, days before the federal elections in Germany. It did not really tip the election in favour of that party, but it was quite striking that Germany's strongest ally met with an unimportant party in Germany, although it is now getting to be first in the polls, which needs to be mentioned. Similarly, in October 2025 the Secretary of Homeland Security Kristi Noem went to Poland for a conference a week before the Polish presidential elections, and she pronounced herself in favour of the far-right candidate.

The Chair: I do not want to interrupt, but you need to speak up. We are losing a lot of the wisdom that you are imparting because we cannot hear it.

Tara Varma: Apologies. I will speak a bit louder. We have seen interventions from two key members of this Administration in 2025: Vice-President JD Vance in Germany and Secretary of Homeland Security Kristi Noem in the Polish presidential elections in October. She pronounced herself a week before the election at a conference in Warsaw in favour of the far-right candidate, who ultimately won by a short margin the following week. We have seen this playbook in action. In April 2026, there will be key Hungarian elections. Hungary's leader is the one most favoured by President Trump. He was the only European leader mentioned during his presidential debate with Kamala Harris in September 2024, and now we are seeing an ideological shuttle between Washington and Budapest, which is quite interesting. It is not just the US going to Hungary but Hungary coming to the US.

As a French person, I cannot help but mention the French presidential elections in April 2027, which are also key. France is now the only nuclear-powered state in the European Union, having the strongest, largest diplomatic network and the President of France having the prerogative when it comes to defining foreign and security policy. If France were to suddenly have a far-right majority and a far-right president, that would lead to a very different equilibrium and balance in European politics, possibly more in favour of what Washington wants.

I agree with Peter that I am not sure that everyone in the Administration is aware of the variety of nuances in each European country's domestic

politics and there might not be enough interest in that, so that playbook might not work systematically. If they want it to work, they would have to have a tailor-made operation per country. However, I think the interest in such interference is written in black and white in the strategy. I do not want to understate it, because it was received in Europe as quite a shock and it needs to be highlighted. There is a whole section dedicated to it in the National Security Strategy. No other continent gets such dedication. I want to underline it because I think it is absolutely of concern to Europe.

Q234 Lord De Mauley: Mr Rough, in your answer to Lord Robertson's first question, you mentioned the deprioritisation of the Middle East in the NSS, which is interesting in view of President Trump's interest and actions in Gaza and then Iran. How significant is the deprioritisation for UK strategic planning, particularly regarding energy, security and counterterrorism? Who is likely to try to fill the gap left by the US and is there anything the UK can do about it?

Peter Rough: The National Security Strategy speaks explicitly about avoiding George W Bush-style lengthy interventions in the Middle East. Yet if one surveys the Trump Administration's first year in office, there has been a rehabilitation of ties with Turkey, the US is in the driver's seat on Syria and Iran policy, and we all saw the President's first trip abroad to the Gulf monarchies where he forged a series of new economic deals. No foreign leader—I believe this is true—has been to the United States more often in the first year in office of President Trump than Prime Minister Netanyahu. Across the board, as we survey US strategy globally and look at the global chessboard, the Middle East is not really fading, at least in the order that it was listed in the document, into fourth place.

I am not sure what exactly the implications are because there seems to be—perhaps this is too much to say—a divergence between strategy and action but more sustained interest than some might think. I have not even mentioned Gaza, the plans that the US has put on the table and the briefing that Jared Kushner gave in Davos on the rehabilitation and rebuilding of Gaza. On energy policy, I suspect the US has brought a lot of resources on board in light of Russia cutting its energy ties to Europe and the European decision to move away [from Russian hydrocarbons].

I do not think that Middle Eastern energy supplies for Europe or as a global commodity are at all threatened. The US is still probably on the leading edge on all things Middle East-related. It is probably more difficult for the UK to play a larger role given the strained ties, as far as I can tell, between Downing Street and Prime Minister Netanyahu. The Israelis are clearly our main partner and ally—the unsinkable American aircraft carrier in the region.

Tara Varma: I am not a Middle East expert, so I would rather not answer.

The Chair: Thank you very much. I think we have covered quite a lot of territory in the questions and we have a very clear picture about how

important the two strategies are. We are very grateful to you for enlightening us on so many of these issues. You will get the transcript and, if there are any obvious corrections that you want to make, please let us know about them, but otherwise thank you very much for coming on this call today.