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QI Panel:

Europe and the Iran War

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12:00 - 1:00 PM ET

Anatol Lieven 0:23

Welcome everybody. I'm Anatol Lieven, director of the Eurasia Program, here at the Quincy Institute for Responsible Statecraft, an institute which, as I hope you know, is dedicated to the promotion of prudence and restraint in US foreign and security policy and that of NATO. Before introducing today's program and speakers, I just like to flag that this Thursday at 1pm EST, I will be interviewing Rose Gottemoeller, a leading US nuclear arms negotiator and senior official, about her latest book on the arms reduction process with Russia after the end of the Cold War. So I hope you will be able to listen into that for today. If you have questions, as I hope you do, could you please put them in the question and answer you see at the bottom of your screens, and I will pass them on to the speakers.

So for today we are going to discuss the impact of the Iran war on Europe and on transatlantic relations, and for this we have three extremely distinguished and interesting speakers. James Crabtree is an author and geopolitical strategist who spent many years living in Asia. He is a distinguished visiting fellow in the Asia program of the European Council on Foreign Relations, a columnist for Foreign Policy magazine, and author of a book on India, *The Billionaire Raj: A Journey Through India's New Gilded Age*, and he is presently working on a new book, *The Perimeter: The Struggle for Primacy in the Pacific*. Thomas Fassbender is a leading German journalist. He was for many years a German correspondent in Moscow. He has a PhD in philosophy, and since 2023 he has been head of geopolitics at the *Berliner Zeitung*, a German daily newspaper, and he is author of several books, including a biography of Vladimir Putin. Molly O'Neal is a non-resident fellow here at KYC, former US Foreign Service officer who, from 1989 onwards, was chiefly devoted to handling US relations with Central and Eastern Europe, Russia, and Eurasia, and Molly has a PhD from the John Hopkins School of Advanced International Studies.

So, welcome everyone. I thought I would begin by asking you, in turn, and maybe starting with James, about the impact of the Iran war, and whether, in your view, this impact on Europe and on transatlantic relations will be deep and permanent, or as we have seen in the past, there have been these crises in transatlantic relations, in even in relations sometimes between Britain and America, and then actually thereafter things revert to normal, and I certainly have picked up a certain feeling in European security quarters that if the Democrats win in 2028 that basically, you know, the Trump is a is a horrible aberration, and that you know we can go back to the status quo ante. James, what do you think? Is that likely to be the case, or do you think that the impact is much, much deeper?

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James Crabtree 4:14

I don't think that is likely to be the case. I don't think I'd be interested to know who you're talking to about 2028 or even 2026 in a funny way, I hear the opposite all the time, that there will be no going back, whatever happens, and the question is to what degree will it continue. I mean, I think I would say two things, that the first of which is that we live in a state of enormous uncertainty with respect to transatlantic relations, and we have done since the Trump administration, as in there are three or four scenarios that you can conceive at the end of this, and I still think we don't quite know where we're going to end up. So, the best scenario is an orderly rebalancing within NATO over time, by which I mean it's gradual and consultative, the nature of the rebalancing between the United States and Europe, which gives Europe enough time to rearm with American support in the areas where we have strategic weaknesses, which we're all very familiar with, strategic lift, ISR, you know, the military side, it happens in a planned and coordinated way.

There are moments in which, you know, that doesn't look maybe that likely, but it doesn't look impossible. So, for instance, after the Munich Security Conference, when Marco Rubio, as Secretary of State, and Elbridge Colby from the Department of War turned up, then not very many people in Europe who disagree with the kind of messages that they suggest. If that is the policy of the United States, and I think Europe is broadly on board, or at least Europe strategically, it is on board now. Whether they could deliver that in the way that that that American policy wishes is another question, in terms of internal cohesion and coordination, and making promises about defense spending with your fingers crossed behind your back. But nonetheless, I think everyone's pretty much on board with that.

But then there's a sliding scale, you know, which the next worst option is a sort of disorderly uncoupling at pace, and sometimes it looks a bit like that, and the coordination, for instance, over last week's announcement of changes to troop levels in Poland, looked a bit like that, and then you have a sort of sliding scale down to something that looks much more like a very disorderly breakup, and at the worst moments, for instance, during the worst of the Greenland crisis, and immediately after Iran, that looks much the more likely as we look ahead towards the NATO summit in Turkey, and that the potential kind of clash that might occur at that as the next sort of breaking point.

So, in answer to your specific question, I don't think Iran is terminal, I mean, I could imagine a situation in which a combination of American pressure and what the New York Times once rather delightfully dubbed Europe's policy of strategic self-abasement, as embodied by Mark Rutte, might sort of bring things back from the brink and stop a cracker, but I do think it is at the moment a very clear downward trajectory, and the variation is of, you know, that there are moments where the downward trajectory looks very severe, and then there are moments in which the downward trajectory is arrested, but the trajectory is very definitely downwards, and the question is, you know, at what speed and with what level of violence is that downward trajectory going to continue, is it going to be an orderly and ultimately sort of amicable rebalancing, or is it going to be some kind of crisis?

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And I don't think we can rule out the notion that at some point it is a genuine crisis, and that crisis could be over Greenland, it could be the end state over Ukraine, or it could be Russian activity in the Balkans, or something like that, where it becomes clear that the United States is going to take a position which is really strongly against the core strategic interests of Europe. So that's what I mean when I say that we're in a sort of situation of great strategic uncertainty, where I think it is possible to imagine a sort of orderly rebalancing within NATO, in which Article Five basically, as far as we can tell, is still in operation, but I think we also have to conceive of much more, a much greater disjunction, and probably plan on that basis.

Anatol Lieven 8:10

Yes, I mean, if Trump did move actually to seize Greenland, it's hard to see how, you know, the NATO alliance could survive.

James Crabtree 8:20

Yourself, Anatol had a delightful way of phrasing this, in which you talked about the absurdity of sacrificing a country or something that wasn't part of NATO in order to sustain some something that was, as in, in a sense, prioritizing Ukraine over Greenland, and that I think you call that a great strategic embarrassment, and so if we do get to that kind of position in which we're trying to sustain NATO, or rather sustain Ukraine, and sacrificing NATO, I don't think we'll get there, but these tensions are very evident in terms of the position that Europe finds itself in, and one other final thing I'll say before turning over to my much more distinguished co-panelists is that, in a funny way, Iran makes the dependencies that Europe is struggling with trying to outgrow even worse, because not just it makes the kind of military issue for Ukraine more problematic because of the effect on a weapon on American weapons stocks, but it makes the specific energy dependency that Europe has greater, because in a sense European nations and companies are busy signing long-term gas contracts with the United States, so one of the major long-term consequences of Iran is that we have increased our dependence on the United States at a moment in which we have an American administration that seeks leverage, and so that is also far from ideal from a European position.

Anatol Lieven 9:44

Molly, you're writing a policy brief on this at the moment. I mean, how confident are you in Europe's ability to build up its armed forces, and, and also just if you will, strategic coherence, in a way that could within the foreseeable future substitute for the US role in NATO?

Molly O'Neal 10:10

Well, yes, James covered some of the areas that I have also written about in this piece, so I agree with much of what he said. I think I would say that the estrangement between the US and Europe is, I don't see it likely to be reversed, and, moreover, I think that the conceptions that we have about resolution, you know, are in some sense taking projecting into the future the sort of

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benign role the US has played relative to Europe, and when you read the national security strategy, you see that there's an element of animosity or kind of veiled hostility toward Europe, really, and there is respect with respect to European Union in particular, I think, and so my paper is about whether and how the European, how Europe could achieve a strategic autonomy, which is a stated goal, as you know, Macron has said for a while, and now seems to be forced upon Europe by the sort of estrangement, or the this disprecipitating event, which is the invasion of Iran, which, of course, was preceded by the withdrawal of Trump from the American commitments to Ukraine, and it's, and the attempt, of course, to fashion a settlement of that with Russia, is I think, and then prior to that, of course, the Greenland moment, which we've spoken about before, so I don't see those.

I think that I think that the estrangement isn't only a product of Trump alone. I think it's something to do with a modification of the international system, and so the Europeans are, I think, coming to terms with the fact that, like, you've all heard and read, of course, Carney's speech at Davos, I mean, that there is a rupture, and that there's no, there's no going back, and I think that is a growing understanding. So, US and this conception might just be one of the three major parties, powers in the great power, say, in the new and the emerging system, which are the US, China, and to some extent Russia, so and so I think that if you conceive of the situation like that, you can't really anticipate, you know, the resolution or everybody going back to quote normal. I think there might not be a way back.

So, what I talk about in the end, the paper specifically, is not to emphasize so much NATO, which is, of course, very important, but rather, what is the role of the EU in the orchestrating the defense build up in Europe, and is this legitimate, and is this helpful, and so I look at the collective action problem in Europe, the fact that you have 27 members, you have the sovereignty question, which I think, where this member states are still somewhat jealous of their prerogatives in the realm of security and defense, and then I look at the German problem, in other words, the fact that the Germans are surging ahead with their rearmament, and this is creating some disquiet and some anxiety among the Poles and the French, and so I suggest that it would be a better idea to proceed within, in so far as the European Union is an actor, they should be proceeding in a more orchestrated and balanced fashion, so as not to create tensions within the European Union itself, and then I suggest that the whole process of rearmament in Europe, as the way it's being conceived, both in the NATO context and in the European Union context, is to totally neglect the role of dialog with Russia that could be part of a secure arrangement in a post-war scenario, and that there's just an absence of diplomatic activity, as we all know, by the Europeans with respect to Russia, and while they're boycotting, or somewhat, you know, they don't want the proposed approach of Trump and Putin, they don't want any other approach either, or apparently not, because they don't have any proposal to bring, so it seems.

And at the end of the paper, I talk about the fact that, nevertheless, the year, even though I've said bad things about us, attitude toward Europe, I nevertheless think that what we'd like to promote and what I'd recommend, and it seems in keeping to me with the KYC Institute's view on US foreign policy, is I'd like to see the US adopt a more constructive and more predictable

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attitude toward the transformation of its relations with Europe, in order to build more reassurance and less panic on the part of the Europeans about the US attitude and the potential. Abandonment of Europe, so, so that obviously not healthy for our United States interests, nor for those of Europe, so, so that's kind of the gist of what I say.

Anatol Lieven 15:13

Thomas, there seems to have been both, according to all the news, I mean, a very considerable shift in Germany. If you look at Mears starting with a much softer line on the Iran war and then becoming more and more acerbic, is this in response to German public opinion, and secondly, is the present German rearmament surge sustainable in terms of German public opinion, if Germany's economic stagnation continues?

Thomas Fasbender 15:48

Well, you could add the question, is it sustainable in terms of German financial resources and economic development? But let me start with unhappily agreeing with Molly, unhappily as a European, because I think Molly, you're fully correct with all what you said about Europe. Europe is in a deplorable situation, having been thrown not only by the Iran war, but even before, almost, almost since the beginning of the of the second Trump presidency, having been thrown in a situation where there is no historical blueprint since 1945 according to which we could operate, according to which we can, we can, we could decide on the right policies, and there is not only no unity among the European states, among the European countries, there is no unity within the European countries, either on whatever question you say, we all agree in theory that Europe needs some sort of strategic autonomy, some sort of strategic independence, but there the question starts how should it work, should it be led by Brussels, should it be led by Paris well London is out by now, but by Warsaw or Berlin, what is Rome's rule?

There is not the least consensus on either of these questions. There is a certain consensus on the enemy image, the enemy in terms of in the form of Russia, but when you look, go down towards the polls in Germany, we have 35 40% stable who say we will not have any conflict with Russia. We do not need any conflict with Russia. We do not need to fear Russia. The Russia question is polarized. The military army rearmament question is polarized, the leadership question is polarized, the relation to the future of the right relation to the US is polarized, there is no unity at all,

And to try to answer your question, starting with Mertz, my impression is that Frederick Mertz seriously, sincerely feels this polarization, feels this unclarity, and he sort of tries, tries to balance by taking one position today and the other position tomorrow, and the day after tomorrow, a new one, and then you, you always have to see Frederick Mertz is of an impulsive nature, and he's not always in full control of what he says, so when he talked, remember when he talked, said something about Brazil being not a nice country, and being a country where you're happy to leave, this does not reflect, say, a statement like attitude, what he says about

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what he says about Donald Trump and the German relation and the behavior of US and international politics is also not helpful, and he can really, you can really assume, well, I wouldn't say really Trump-like, I mean, Trump pretty much had two completely different personalities, but in a way, both are in their verbal statements to a degree unpredictable. So, what? What merges real position? They take, take internal domestic policies on migration, or on tax, or on credits. This is what he does and what he says contrasts completely with what he did and said one year ago or one and a half years ago, and this has to do with the fact that there is no clear understanding of what Europe's strategy, rule, vision, and future will be, can be, should be.

Anatol Lieven 19:44

Yes, I mean, of course, what we see across so much of Europe at the moment, as in Germany, is this gathering internal political crisis, you know, with the the decline of the of the mainstream. Parties, and I mean different countries are at the sort of head of the list for crisis at a given moment, just just at the moment it's Britain, which is in this state of crisis, and I wanted to ask you, James, I mean, where do you see Britain going with reference to Europe and European security, and is it possible for Britain to integrate into a new form of European security without the US, without being in the European Union?

James Crabtree 20:35

Well, now that is an interesting question. So, some of your viewers this afternoon might not be watching the debate on Europe within the United Kingdom quite as closely as those of us who live here, and they'd be forgiven for that, but it has changed quite a lot, almost even in the last week, because we're having this muddle at the moment over whether or not we want to get rid of our Prime Minister, which we probably will. The competition to get rid of the Prime Minister has prompted members of the governing Labor Party, who would like to be Prime Minister, to come out and be much bolder. One of the contenders, not the likely winner, winner, said at the weekend that he thought that Britain should rejoin the European Union, which was something that was almost unsayable.

I mean, in terms of Britain and its sort of strategic community, would actually very much like to have a more, a closer strategic relationship with the European Union, which didn't involve being part of the European Union. That the challenge is that, generally speaking, you know, Europe is an all or nothing project, and therefore, if you want to participate on the security side, then you also have to do, you know, fish quotas and all the rest of it. So, I think it is, it is a question that we don't know the answer to. The debate here is shifting politically in one way very quickly, that you're beginning to see people talking about rejoining, but the barriers to that happen happening are huge, both politically, economically, in all sorts of ways. I mean, I think the more interesting question is to what extent can the e3 as France, Germany, and the United Kingdom are sometimes referred to, provide a sort of level of strategic leadership within Europe, because you have this tension between, in a sense, two kind of communities on how we should move forward.

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I think there is consensus on the fact that we need to develop what Molly called some form of strategic autonomy, there's a great question on whether or not we're managing to do that, and how quickly we might, and how we would go about it, but for instance, the two kind of key players in this, the European side and on the NATO side, have quite a different argument about how you might go about that. On the European side, particularly led by France, you have a more sovereignty-led agenda, in which, for instance, the weapons that we're planning to buy to become more sovereign should be European, and they should be led by Europe. And then you have the NATO side, which is very skeptical of this, and thinks that this fundamentally still has to be a transatlantic project, because otherwise it won't work very well.

And then you have the United Kingdom, which is kind of stuck in the middle of this, as in, you know, that instinctively still, despite the Trump administration, Atlanticist in orientation, but also recognizing that, for sort of strategic reasons, we need to get closer to Europe, because, you know, that, in a sense, is the answer to the problem that we have, if the United States is going to move in further away, either sort of, as I said at the beginning, either in an orderly cooperative way, or worse, in a kind of quick way. So, you know, I think I think this is very complicated. I don't think we know the answer to this. The role, the debate within the United Kingdom is also very divided. I mean, as soon as you begin to start talking about a closer relationship with Europe, then it becomes very politicized in the UK, and it's also very difficult for Europe, because the sort of question of whether or not Europe wants the United Kingdom back in, I mean, at some level probably they do, but there's also the risk that then our politics heads in a kind of populist far-right direction, and that all then becomes very complicated, so I genuinely think we don't know how this whole this will end up.

What the Labor government has been trying to do is to sort of edge forward in ways that are cooperative but not politically toxic at home, and that has involved, for instance, trying to do more to support Ukraine, trying in our own way to edge towards greater defense spending, but you saw, for instance, one of the mechanisms that Europe has introduced in order to do more for its own defense and do more to support Ukraine is a funding mechanism called SAFE, and the United Kingdom and the European Union were not able to agree a way for the UK to participate, and therefore the sort of the first major hurdle that was faced in terms of UK participation in a kind of common future European security was bungled in a way that everybody says is very embarrassing, but they couldn't work out how to get around, so I think it's a very difficult sort of these forms of cooperation are politically very difficult on both sides, and that comes back to Molly's point, which is, you know, strategical. Autonomy sounds fine. Everyone now has agreed, agrees that it would be a good thing that we don't seem to be terribly good at delivering this in practical terms.

Anatol Lieven 25:09

Yes, sticking with Britain just for the moment, the British National Security Strategy struck me both as extremely muddled, but, but also, as I have to say, almost classically British in recent years, in its failure to prioritize, and in its well, frankly, the inability to match all the things it said that Britain had to do, or should do, to Britain's actual resources, because of course, there is a

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huge, you know, because there was all this talk about, you know, Britain's commitment to what's left of its empire and Indo-Pacific, and all these things, and yet, you know, obviously, Ukraine, Russia was supposed also to be front and center, and yet, of course, to an almost embarrassing degree, most notably with the Navy, it turns out we don't actually have at present the military resources to do anything like this.

James Crabtree 26:14

I mean, I think if you're asking me this, then it is a, you know, the difference between sort of ends, ways, and means is very stark in both the United Kingdom and France, to be fair, as the only, if you sort of conceptualize Europe as having six reasonably capable middle power militaries over time, then you have the United Kingdom, France, Germany, Poland, Ukraine itself, and Turkey, and they're all, you know, that in a sense is the kind of backbone of a of a sort of stronger future Europe. Now you can immediately see all of the problems, even within that configuration, which is that they're internally divided. But, as Molly said, one of the major divisions is simply spending capacity, where you have to be fair to them.

I mean, I think that the strategic elites in Paris and London would like to spend more. It's not like being in Madrid or Rome, where the case for spending more isn't clear, there is a consensus, whether or not this is a consensus that Quincy itself would agree with, but there is a consensus that more needs to be done to sort of deter Russia and work collectively to rearm, to rebalance against the United States. In a sense, Britain has become more French, but both Britain and Paris don't have the money to do this, or at least they're not willing to sort of take the political hits in terms of other spending cuts and reprioritization to do this, so you have a sort of an unbalanced Europe in which a lot of the heavy lifting is being done by Germany, to a lesser extent by Poland, and to some degree by funding mechanisms that are being thought up by Brussels, so that the kind of internal political economy of how this strategic autonomy is meant to be happening is quite complicated, and I mean, I don't want to be entirely sort of gloomy about this.

There is a self-lacerating quality to the European debate, and a lot has changed. I mean, the German change in and of itself is enormous. Germany will be the world's third highest military spender, and you're moving to a world in which the of the top four, then Germany and Japan will be three and four, and that's a big change in terms of the ability of the kind of the US allies and partners to do more burden sharing, you know, Britain and France are moving more slowly than the European Union itself, I mean the figure of 880 billion that people throw around isn't exactly right, because it includes some things that aren't really properly military or fiscal head run, and that kind of thing. Nonetheless, at the European level, both in terms of increased spending commitments that have been eked out of the NATO partners, new mechanisms at the European level, Germany, Poland, I mean, this isn't nothing, things are moving. The question, I think, is are they moving quickly enough relative to the threat to the East and to the kind of the change in policy to the West. I think that that's the question.

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So, I don't think we should, we should be too self-critical. There is, you know, people do recognize that change is needed, and some change is happening, but the changes that are needed are very profound. We've been living under an American security umbrella for a long time, and we don't have a lot of the capabilities that we need. Most of the capabilities that we need are incredibly expensive, and therefore there's a big debate about how you get them. And so I think that's the nature of the debate. It's not sort of complete inertia and inability, it's more a question of sort of speed and speed relative to the changing environment and the threat that we face.

Anatol Lieven 29:26

Since you raised the position of the Quincy Institute, but also following on from something you said, the Quincy Institute is actually strongly in favor of European rearmament and European strategic autonomy, but, and I mean, this is a question coming on to you, Thomas. Given the military lessons of Ukraine, I'm not fully convinced that a lot of the weapons we need for, you know, a successful defensive strategy are. Are actually that expensive. Some of them are certainly missiles, especially air defense missiles, but the Ukrainian - I mean, on the ground, the critical factor, which the Ukrainians have used brilliantly, has been drones, and actually a neglected thing in combination with drones is mines. Now, as we know, actually these are both very cheap weapons, and yet astonishingly effective.

And I believe Thomas, the question has been raised in Germany, not just about whether Germany should be buying American weapons, but also whether it's buying the right kind of weapons for this new form of warfare, or whether too much money is going into what you might call legacy weapons. I quoted I hope not too sarcastically or unkindly, Field Marshal Hague in the 1920s even after, you know, commanding on the Western Front in the First World War, the British writing that there will always be a place in warfare for the well-bred horse, and I said that perhaps some, you know, given the experience and training and background of many of our generals, they, they instinctively think that there will always be a place in war for the well-bred tank, despite the fact that tanks have, in fact, not have proved astonishingly ineffective in the war in Ukraine that we've seen over the past two years, precisely because of drones and mines. So, Thomas, could you tell us something about the debate on this in Germany? And where do you see it going?

Thomas Fasbender 31:52

Well, first, I fully agree. I would even go so far to assume that probably 80% say it's a ball, Mark. 80% of the money we spend, for of the hundreds of billions we spend now, for the rearmament search is plain wasted, and will never be proved useful in any, in any sort of whatever confrontation we will see during the, during the near or middle future. One reason is, of course, that the lessons of the Ukraine war, they, they are read but not learned, they are not, they, there is a big inertia, and this is a state of 83 million people, a country, 83 million people, we have a huge bureaucracy, government administration, military bureaucracy, and until lessons are really learned, like those from the Ukraine war, it takes a very long time, and it takes some very, very

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good people to do that, and I would not assume, I would not assume that we have this density of very good people in those functions, in those positions, who are now taking the rearmament decisions, whatever. What everybody agrees on in Germany is that if we have an army, we need an effective army, and everybody agrees that the army, as it is, has not been effective, has been neglected over 2030 years, basically since the fall of the Berlin Wall. Everybody was, for decades was absolutely sure that there will be no, no army needed for territorial defense, that the German army will be, say, employed somewhere in Africa, in Afghanistan, on some far, far, far away places, but the question of territorial defense is creeping back very, very slowly, and still, I personally, I personally, I'm not, I'm absolutely not sure that there is any threat to the German territory from any other European country.

I would say that the probability that Russian tanks roll over the Oder, nice over the order, nicer border with Poland is as probable as Spanish tanks rolling from the other side across the Rhine, to put it polemically. Okay, we have, of course, people understand we have obligations towards allies, towards allies like Poland, like Baltic, like the Baltic countries, where the exposure, strategic exposure, and the danger of a conflict with Russia is exponentially larger and higher, as it is in Germany, with the rearmament discussion. Well, why is Germany so? Why is the German establishment so convinced that we need this rearmament search. It is because of two things: the enemy, Russia, is has a uniting factor, has a uniting effect on society, on the society in the society, in a societal debate, and on the political theory.

There, the second is that, of course, if we want to assume leadership in Europe, we need to back this up with the, with, with the well, the necessary military capacity, as we have to back it up with the necessary economic capacity. At the same time, everybody knows in Germany that part of all this is talk, part of all this is words, and I'm sure that even politicians, and when you talk to politicians, they would not really object that this is done to appease the public, to appease the allies, to appease the US. It's all, it's a large appeasement campaign because because, and this is for me today. We have not, we have not touched upon this yet. This for me, the elephant in the room. We are all also here in this, in this round. We're all leading an inner circle establishment debate, the political establishment, the think tank establishment in Germany, not so much in the US, but in Germany and in Europe, still follows long established mindsets that we have been used to, that we have been used to follow, that we had, we have arguments that we have been used to believe in the ever growing European integration, the never, the never-ending transatlantic alliance and friendship, all these things, the need to act unitedly as Europe.

This is becoming more and more.. how should I.. how should I say.. yeah.. an inner elite discussion, and at the same time, in all European countries, from below, we have an extreme surge of right-wing sentiments, of right-wing arguments, of right-wing demands, and there is what I'm afraid of, is that as establishments act, we will continue to argue and to discuss it, to debate according to these lines, while at the same time some disruptive moment is preparing itself, be it in Germany or in England or in France or in some other country. We have this enormous right-wing push coming, coming from below, officially, when the media and the politics, everybody believes, well, this is just populist sentiment, and nothing is really to be afraid

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of, but disruption will come, and disruption can will be able, can come, could come next year, year after next, it could come from France, it could start where it starts is a completely different situation, and nobody, no one really in the among our elites are prepared for that, and that, that I see, is the real danger. We still try to debate along the line, we must sort of go back to the status quo ante, because there is nothing that we know apart from the status quo ante.

Anatol Lieven 38:01

What this is actually one of the questions from from the audience. If, for example, *Rassemblement National* wins in France next year, and this, of course, would give a tremendous impetus to right-wing populist movements elsewhere. I mean, what effect would you expect that to have on the future of Europe, well, the European Union of European European security thinking, because, of course, people point to Meloni in Italy and say, well, actually nothing really changed, but France is a hell of a lot more important strategically.

Thomas Fasbender 38:39

I see there is a, there is a certain probability that the European institutions and the whole European setup, as it is today, will simply implode, implode in the sense of a big disruption where really nobody, not the right-wing people either, has a clear idea what will come next and what will come after, and the more, the more the establishment clings to the to the preservation of the status quo, the higher the higher the probability that something will happen where the consequences are absolutely unclear and unforeseen.

Anatol Lieven 39:12

And James, well, we'll have to see, of course, the next by-election in England, but what do you see the impact of Reform on all this if they were to actually lead the next government?

James Crabtree 39:30

Well, I mean, that's not going to happen until 2029 so it's almost, you know, it's a very hard thing to talk about at the moment. They barely have a foreign policy. I mean, I think it would be clear that a reform-led government, which is something that the United Kingdom establishment is grappling with at the moment. I mean, I don't know if you'd say it was more likely than not, but it's definitely a sort of high possibility at the moment. I mean, it would make cooperation with Europe less likely, and you know there are elements within the Reform coalition that have a view on Russia that is outside the normal British mainstream. I suppose you'd put it like that, so it would certainly ask a range of questions, but generally I suppose reform appear to be more like Maloney than, for instance, AFD, in terms of their instincts, you know, they're strongly Atlanticists, for instance, so I think it's sort of hard to tell, and I'm not sure they even know themselves how they would govern. I mean, there were two other points I wanted to make, one of one of which is simply about the attitude of the United States towards European politics. I mean, it is a problem that Europe has. I mean, I have more recent experience living in Asia,

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that, for instance, Japan generally doesn't have, which is that the American president and those around him feel that they have a stake in European politics, and I think almost as much as the military question, as you said at the beginning, the fact that the president and those around him are ideological, ideological anti-Europeans, and who see the European Union as something that needs to be systematically weakened.

I was over the weekend in Boston talking to Steve Walt, who I suspect is a figure who's reasonably sort of Quincy adjacent, and he was talking about the fact that actually, from the point of view of the United States, then that's an entirely sensible strategy that weakening the European Union, if you are, if you want to run a strategy which Steve Walt would describe as being a predator, predatory hegemon, then actually getting rid of the European Union and being able to negotiate with European countries one by one, which are much smaller when they're not acting collectively, is very sensible, but I think the extent to which the United States, not just in terms of its political leadership, but also its sort of technological overlords, is now willing to interfere in European politics. That's something that is, you know, for the ideological sort of transatlanticists is hard to grapple with, because you do now have a United States which, not going to say it seeks regime change, but it seeks to influence European politics. You saw this in Hungary relatively recently, it wasn't successful in that respect. You could argue about whether it will ever be successful, because there might be a reaction amongst European politics.

So, I think kind of getting to grips with the world in which this is not simply about the role that the United States seeks to play in a common European defense, and you know, should we buy American weapons? You know, how dependent are we on American artificial intelligence systems? You know, these kind of questions. It's more deeply ideological than that, which, you know, you could see. You know, it's not as if this has been hidden. You know, JD Vance gave a speech at Munich, in which it was absolutely clear, the way that this administration, perhaps not the American polity in general, but this administration has a particular attitude towards Europe and the European project, and I think you know that often we are in denial about the nature of that, that we hope we hope it's going to change, or that they're not really serious about it, but I think the only sensible attitude is to plan on the basis that that is going to be the way that this administration will behave, at least for the rich remaining two and a half years, until then, you know, there may well be some reversion to the more history, the norm, as it were.

So, so I think, in addition to what reform should do, then really the question is, the how does Europe cope with, you know, an American partner on which it is in many ways becoming more dependent, in terms of energy dependence, technological dependence with AI to some degree, military dependence. You know, how do you cope with the fact that it is also an American leadership that seeks to put its finger on the scales of your own domestic politics?

Anatol Lieven 43:37

And yet, of course, we have several questions from the audience about this, the Iran war, the US-Israeli attack on Iran has created huge problems, and as one season, you know, especially with AFD, a big gulf between the right-wing parties who Vance and others in America really want

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to support, and the Trump administration, the from what I gather, I mean, in terms of European public opinion, there is very little chance of European countries changing the and or Britain changing their policies towards the Iran war and becoming involved on the on the US side, would you agree with that, Molly?

Molly O'Neal 44:27

Yes, I would think that would be highly unlikely, given if you look at public opinion polling and throughout Europe, it's extremely negative about the war, about the absence of justification, but also about the absence of planning and consideration of the impact on the Europe and on Asia in terms of the potential economic crisis could deepen, you know, if this war persists. So, no, I can't see, I can't see that. There would be any rallying of Europeans to to this war, they would be willing to help, of course, in a post-war context. They've talked about that, and I think that, but of course, Trump finds that highly unsatisfactory. I like to emphasize that whole point about that was hinted at already about the fact that the Iran war is so unpopular, it has sort of wrong-footed the populists in Europe to some extent, AFD and also Rassen Le Mans National, and others, but I think what we're seeing is that they have understood the unpopularity of the, you know, in other words, they've taken their own distance a little bit from the from their previous good relations and sort of seeking the approval of the Trump administration, I see them kind of adjusting that position, and so far it's not hurting them, their polling is still continuing to rise, I mean that's happening with AFD, not dramatically, but it's going up, and then certainly there's been no fading of the the support for Bardella or Le Pen, so but you know what I have seen is I've seen Bardella recently speaking on TV in France about strategic and defense matters, and I don't think he sounds particularly radical, I really think that there's already some sort of reversion to the mean or something like that, there's some sort of like Melonization or something going on, so I wonder if it would really be such a terrific crisis if they were to come to power, but maybe I'm wrong, maybe I'm wrong about that.

Anatol Lieven 46:41

What do you think, Thomas, with reference to AFD from that point of view?

Thomas Fasbender 46:46

Well, it is completely right that the Iran war has caught the right, the German right on the wrong footing, because there was from the beginning of last year there was sort of very pro-Trumpy sentiment, pro Van sentiment on the right, especially because of the promise of ending the so-called forever wars, the promise of stopping migration anyway. Well, this remains a uniting factor, but the disappointment with Maga, remember, there was already, or there is European copy, Miga, make Europe great again, led by the Romanians and some others, but the promise of MAGA has lost a lot of, well, a lot of luster. What I would say in terms of melonization, because that's a critical word here, that's that's the right word, Melonation is always a possibility in exchange for power, and for sure, when you talk about AFD in Russia, yes, there are strong parts in the party who favor peace with Russia, who favor cooperation with Russia, energy

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purchases from Russia, but one must not forget that 70% of the AFD voters in the last elections were from West Germany, so there is in Germany you have much more understanding for Russia and her interests than than in the West, and in the West, among those AFD voters, there are a lot of disappointed old anti-communist conservatives, and the typical, typical West German anti-communist conservative has no, has no sympathy lost for Vladimir Putin or the Russian, the Russian war, and even the Russian interests.

So, I would say, and I'm not alone with that, that in exchange for power participation, the AFD would have no problems to cut off their entire their pro-Russian and pro-peace rhetoric and join the NATO position, the established NATO positions, because there is a, there is a saying in Germany that as soon as in order to, for a party, for any party to participate at the power on the at the power level, you have to be pro EU and you have to be pro NATO, and the Greens went through that, the left, even the leftist party went through the process, and few people are doubting that the AFD wouldn't do the same.

Anatol Lieven 49:21

But can the AFD really become pro-EU, given its whole well, also in given, given its stance on on migration, for example, would that not create an automatic

Thomas Fasbender 49:33

Well, there's a strong, the strong element in the AF, in the AFD, who says, who say that EU is not bad at all, it's the, it's the way that we, that what EU we have, so they are not against the EU, but the EU needs to, needs to be reformed. They are against the EU in their, in their present form. And then don't forget, politicians want positions, they want power, and the EU, we. Provides a lot of positions, a lot of functions, a lot of possibilities. So, in order, the EU is an ideal instrument to absorb opposition to itself, to herself, but, of course, by compromising on reforms. The main reason why the AFD followership is growing at the present pace is the absence of reform. It's not just migration, it's the absence of reform on anything, on pensions, on health insurance, on education, basically on everything. That's the reason why the AFD is now almost closing to 30%.

Anatol Lieven 50:39

Yeah, well, same in England, this - we all seem to be pretty much stuck now, a different area of discussion, of course. But James, I mean, I've been following the British press, and of course, there is a lot of discussion now. You know, how far are the Labor government's problems, the effect of, you know, Starmer's personal failings, and how far is it that it is just becoming, you know, extremely difficult to move and change things with a stagnant economy and and a congealed bureaucratic system.

James Crabtree 51:23

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Yes, I mean, I think both of these things can be true at once. The situation in the United Kingdom, politically, at the moment is very messy. The Labor government pretty dire, and the sort of basic economic position of the United Kingdom, in terms of productivity increases, growth, and the projected spending needs, in terms of healthcare defense increases, you know, this is a very complicated situation, not a good one. On the other hand, situations that can look disastrous when you know, given reasonable leadership, can turn around quite quickly. You know, look at European countries like Greece or Spain, which were basket cases 10 to 15 years ago, and have now had something approaching a kind of mini renaissance, albeit from a very low base.

So, I don't think these situations are entirely terminal, and I do think that there is a tendency in every country to self-lacerate while not looking around at their peers. This is a, you know, the case of the United Kingdom is particularly bad and have a lot of self-inflicted elements to it, going back to our response to the financial crisis, the decision to leave the European Union. I mean, it's been a tableau of poor policy choices, but I don't look around the world's middle powers, at Japan and South Korea and the European middle powers, and see others who are doing brilliantly better. If you see what I mean, as in, they face a set of common problems, some of which are demographic, financial, technological, and some of which are to do with the kind of common position of those of us who have happily sat under the protection of the United States and are now adapting to a more dangerous world.

So, I do think that, you know, it is true that there are elements of the United Kingdom's situation that are particularly bad and to some degree self-inflicted, but there is also a sort of wider group challenge here that is common to rich world middle powers that have been American allies who are entering a new and more dangerous world in a way that they would rather not have had happen, and that they're sort of trying to emerge from this in a rather faltering way, kind of blinking into the sunlight of a new world order.

Anatol Lieven 53:22

Well, but I mean, is that not one of the really worrying things that we see, you know, this crisis or stasis in Britain and Germany and France simultaneously?

James Crabtree 53:35

I mean, I suppose I would, as we come to the top of the hour, I would like to sort of give a note of optimism here, which is at the very least, I would rather be in Europe's position than I would be in the position of our peers in East Asia. In this particular respect, I mean, Donald Tusk had a nice line not too long ago about the absurdity of 500 million Europeans going on bended knee to 350 million Americans to save them from 120 million Russians, as in theory Europe, which, as I said, has six reasonably capable middle power militaries, is far richer than our adversary to the East, who has all sorts of strategic weaknesses. You know, we should be able to get our act together and, assuming a scenario that the better half of the scenarios, with respect to the United States about developing autonomous capabilities and rearming, in a sense, there should

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be a balance of power in Europe that is favorable to Europe, the European side, over a 10 year period. If the United States decides to withdraw substantially from the Indo-Pacific, then the situation that Japan or Korea or Australia or many other countries face is much more complicated because there is no strategic balance in the Indo-Pacific with respect to China, that the difference in power is just too stark.

So, in a sense, Europe's position is within its own hands, and it should be entirely possible. I mean, there are lots of people who understand what needs to be done. It's not a great secret. The question is. Do we have the purpose and political leadership and unity in particular to deliver this, and is it possible that we can convince our former friends in the United States that they should give us 10 years to kind of get underway and get on with this, or is that not going to be something that we're blessed with? But I don't think that a council of despair as to the state of Europe is the most helpful way to go about this. This is an eminently achievable task. I mean, in actual fact, much easier than the situation faced by Japan or Korea.

The question, but I think there are very real questions about whether or not we will be able to do it in the time available, of which the underlying political dysfunction in the most important European countries, the e3 is a very important part of that, particularly looking forward to a situation in, you know, in the 2030s in which you could have two of those three led by new right governments. And then I don't think many people - I defer to Thomas on this - but I don't think many people think that it's plausible that AFD could be in power in Germany, but they could be a much more substantial part of the German polity. Then that obviously would complicate the question of the unity that you need to get to where we need to go.

Anatol Lieven 56:05

I mean, from a sort of harshly realist standpoint, or viewed from Mars or Jupiter, it would seem that, given the apparent unreliability of the United States under Trump, given you know the multiple economic challenges, and given the fact that, as you said, as Tusk said, you know, Europe is so much more powerful than Russia, you would have thought that that would create a strong case for seeking some form of peace and detente with Russia, but I have to say that I can detect almost no impulses in that direction in European establishments. Thomas, is that true in Germany at present?

Thomas Fiebender 56:55

Surely the consensus, again the elite consensus, is that you don't talk to Russia, and whoever talks to Russia is blamed for appeasement and for giving Putin Putin a platform here, but I would, I would say also in response to James, I don't do not see the real threat for Europe as a whole, and for the European societies in any foreign policy, certainly not in Russia. The biggest in any foreign policy issues, the threat is not from Russia. The threat is from inside. It is the domestic policies that threaten our, our social harmony, our financial future, our political unity, it is. It is from inside, and as I said before, if that continue, and it is not a one reason thing, it's not just pensions or just social expenses or just migration, but as long as these, as long as these

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issues are not sufficiently tackled to attract the to attract voters back to the established parties. It does not help at all. No rearmament helps, no talk of foreign threats helps, no talk, no talk of us, of us, or any European leadership helps. We need our politicians, and this answers Anatol, what you said, your question to why, why is there crisis at the same time in England, France, and Germany is not because an external factor or an external threat, it's because of decade-long neglected domestic issues that people, that the simple people feel much better than those at the top.

Anatol Lieven 58:39

Yeah. No, I think that is very true. One final question, Molly, very briefly, will any US administration, in the end, whatever it may say about Europe needing to rearm and so forth, will it ever tolerate real European strategic autonomy, or will it always, in the end, try to command.

Molly O'Neal 59:02

Yeah, I think you're right to identify that there's a certain ambivalence in America about it, in terms of, you know, on the one hand, it's desirable, it frees the US up for, you know, the China being the major threat, and so on, but on some level the habit of being able to dominate and to be able to set the tune, you know, call the tune for the Europeans is, and particularly to have such a huge market for US defense industry. So I was very interested in seeing this speech that Colby gave recently in April to this meeting of the NATO allies, looking at opportunities for the NATO allies to fund the purchase of US weapons, and he was really giving them a pep talk about how it's really necessary for your defense industry to step up.

It's really necessary, you've got to do this. I'm glad some of you are doing it. We're going to run out of weapons, though, so you need to do this, but by the same token, he ended by. Saying, and of course, your industry and our industry, we're going to continue to grow, and so on and so forth. So, on some level, you know, they're unwilling to sacrifice the market, even for the strategic interests that it could offer them. In terms of, I'm talking about America now, in terms of letting Europe have more say and have more autonomy. So, I don't know how that's ever resolved. I think it's something kind of a very, very stubborn.

Anatol Lieven 1:00:27

Well, thank you. I'm so sorry we've run out of time, but thank you all so much. That was fascinating, if, of course, naturally inconclusive conversation, which I hope we will continue in future. So, thank you, and thanks to the audience, and once again, if you're interested in nuclear disarmament, which you should be, I hope you will listen in to my book talk with Rose Gottemoeller on Thursday. Thank you.

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