

STRATEGIC SECURITY

THE CASE FOR A NEW PARADIGM FOR NATIONAL SECURITY

By DR AZEEM IBRAHIM OBE



CENTRE FOR
RESILIENT
SOCIETY

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CENTRE FOR RESILIENT SOCIETY

About the Centre for Resilient Society

The **Centre for Resilient Society (CRS)** is a citizen-focused, international research centre within the Henry Jackson Society, which seeks to identify, diagnose and propose solutions to threats to the social resilience of liberal Western democracies.

The centre's work includes addressing the twin challenges posed by radicalisation and terrorism. The centre is unique in addressing violent and non-violent extremism. By coupling high-quality, in-depth research with targeted and impactful policy recommendations, it aims to combat the threat of radicalisation and terrorism in our society.

The centre's work also includes broader challenges of democratic resilience – including threats from both foreign interference and domestic issues. This includes the potential harm that various forms of social, cultural and political insecurity, conflict and disengagement can pose to the long-term sustainability of democracies, including the resilience of their institutions, public policy outcomes, citizens' health and wellbeing, and economic growth and prosperity. It also explores the balance between free speech and hate speech, and encourages respectful debate between those of different views, rather than cancellation. Moreover, it underscores how social and political instability can make nations vulnerable to internal and external actors seeking to deepen cleavages, undermine consensus and, ultimately, to weaken democratic functioning.

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Overview

We need a new doctrine for a new world. With more global instability than at any time since the Second World War, we are faced with challenges that are not only of a different nature, but also ones that require a whole new way of thinking. Today's challenges are economic, societal and environmental as much as they are military. Hostile powers can – and do – threaten the Free World through other means than merely military ones. The UK is facing down historic decline, both economically and in terms of our strategic capacity, and on the current trajectory is at serious risk of losing its premier position as the leading European power.

We need a new conception of security for a dangerous new world. Preserving security does not just require the prevention of military threats, but anything that undermines society's safety – be it economic crises, health pandemics or destabilising societal changes such as uncontrolled illegal immigration. Britain's low growth and misaligned foreign priorities are seeing the nation relegated to second-tier status in Europe. Misguided energy policies, rising taxation and the spiralling costs of doing business are squandering our strategic potential as well as our economic welfare.

This report suggests a pivot to 'securitisation' as a new national security paradigm – an outlook that recognises the ever-widening array of threats facing our society and the need for extraordinary measures to overcome them.¹ It will explore how the issues of immigration, economic stagnation, ideological activism and direct economic warfare – largely disregarded as direct threats under our existing security paradigm – can fit into a new securitisation model.

¹ Titilayo Aishat Otukoya, "The securitization theory", *International Journal of Science and Research*, 2024, <https://ijsra.net/sites/default/files/IJSRA-2024-0225.pdf>.

Introduction

With large parts of the world turning to or deepening ties with authoritarian states, the West's key asset has been its large consumer market and productive base. Yet the declining share of world GDP (combined with US protectionism and increasing isolationism) is changing this. Chinese solar and EV technology has outstripped that of the West and its semiconductor capacity may soon surpass us too. Countries can now turn their backs on the West and retain access to strategic industries. Growth, in a dynamic sense, is also biased towards the industries of the future in developed economies. Semiconductors, batteries, AI, drone technology, nuclear energy and hydrogen have all failed to fully mature in the UK due to government failures, most notably in regulatory matters and crowding out investment in competitive energy generation.²

Britain faces a perfect storm of declining growth forecasts, soaring energy prices and spiralling debt. Long-term issues in planning law and productivity have been compounded since October 2024 by higher tax rates and the further expansion of the state sector. This loss of economic dynamism compromises both hard and soft power. Britain no longer has the industrial base to logistically sustain a war with a near-peer like Russia for more than two months.³ Our usefulness to our allies, including the vital UK-US relationship, is eroding and falling behind even second-tier European powers. Not only is the UK predicted to have a lower GDP per capita than Poland by 2030,⁴ but also a smaller army and one that is unable to sustain deployment at scale.

Britain is an integrated global economy and has benefited enormously from the rules-based international order secured by the United States. Yet as Trump's White House upsets the very foundations of the system it built, Britain is failing to adjust. There are concerning overtones of a misguided British rapprochement with China, an echo of the Cameron "golden era" policy, notwithstanding the economic warfare being waged on Britain from Beijing. Britain seems, despite the weakening of these institutions, to be making increasingly expensive gestures, including the £9bn handover of the strategic Chagos Islands and opening talks on reparations for Caribbean slavery. Britain is also doubling down on Net Zero, which by 2021 was set to cost £1.4tn, or 61% of GDP.⁵

Why does the UK seem to be acting against its most fundamental national security needs? The answer partly lies in the parochial understanding of the security risks that afflict modern society, politics and media. We understand soldiers and missiles but fail to fully conceive of the risk that having no alternative to China's supply chains might have on our ability to respond to military aggression. Reframing the threats we face (including excessive immigration, the growing influence of authoritarian nations on British society, energy insecurity and economic warfare) under a new securitisation model would enhance the UK's strategic dynamism – preparing us for the challenges of an increasingly complicated geopolitical future.

² Anna Gross, Tim Bradshaw and Rachel Millard, "What is Keir Starmer's plan to turn Britain into an AI superpower?", *Financial Times*, 13 January 2025, <https://www.ft.com/content/b02ba1bd-1075-4703-9b7d-800e2efa4513>.

³ Millie Cooke, "Britain is failing to prepare itself for war with Russia, top general warns", *The Independent*, 16 December 2024, <https://www.independent.co.uk/news/uk/politics/russia-uk-nato-starmer-ww3-sir-richard-shirreff-b2664891.html>.

⁴ "The Case for Growth", The Growth Commission, <https://www.growth-commission.com/about-us/>.

⁵ Chris Giles, "How much will it cost the UK to reach net zero?", *Financial Times*, 3 November 2021, <https://www.ft.com/content/b02b9d51-3e0c-435c-9b53-774ee12ea277>.

Chapter 1: Immigration and Society

The archetypal example of a new threat under our securitisation model might be mass immigration.

The thesis that immigration is always good for growth and was enriching for societies had very strong evidence in its favour at one point. On a global scale, moving people from where they are less productive to where they are more productive is a good idea. Even on a national scale, *in the long run*, when certain assumptions are made, having more labour – a primary factor input – means more output, and so more GDP growth.

Until recently, most academics conceded a range of other benefits from migration. Migrants were more entrepreneurial than native-born citizens.⁶ Migrants were fiscal net contributors.⁷ They accepted jobs that natives were unwilling to do, filling crucial vacancies in care homes and on farms.

However, even when this consensus held, there was an awareness of the broad impacts of immigration on income levels. Low-waged workers lose while medium- and high-paid workers gain. The benefits to the latter group, it was thought, were more than enough to ‘compensate’ the low-paid workers with higher welfare payments. These caveats were not taken too seriously, though many experts advocated retraining programs and the prioritisation of trained and skilled migrants over the untrained and unskilled. Most wrongly assumed that it would require only modest efforts to allow Britain to select the quality and quantity of migrants it wanted and needed. This meant most were confident that, curbing some excesses, immigration would have a small-yet-noticeable positive effect on the wages of native workers.⁸ However, early warning signs in the unskilled services sector were already there to see.⁹

Figure 1 shows how the lifetime contribution of a non-EEA (European Economic Area) unskilled worker will, on average, be fiscally negative from the moment he arrives until the moment he dies. If that worker, as he is entitled to, brings more dependents, then this effect will be even stronger. A medium-skill worker, like a representative UK citizen, may be a net recipient or net contributor depending on how young he is when he arrives and how long he lives for. This graph only shows the direct and some indirect fiscal costs. It does not show all indirect fiscal costs, nor the costs of pecuniary or other externalities imposed on others through, for example, higher rents, longer wait times for public services or increased strain on housebuilding requirements.

In a familiar story, the basic assumptions that these policymakers had made were wrong. At the turn of the century, while the UK was in the EU, the majority of immigrants had a comparable level of education and similar social upbringing to UK citizens. In that period, this was also true of the majority of non-EU migrants, who faced substantially stricter entry requirements and were likely to be drawn from the middle class of Commonwealth nations such as India, Nigeria and Pakistan. But as the Office for Budget Responsibility (OBR) notes, the post-Brexit

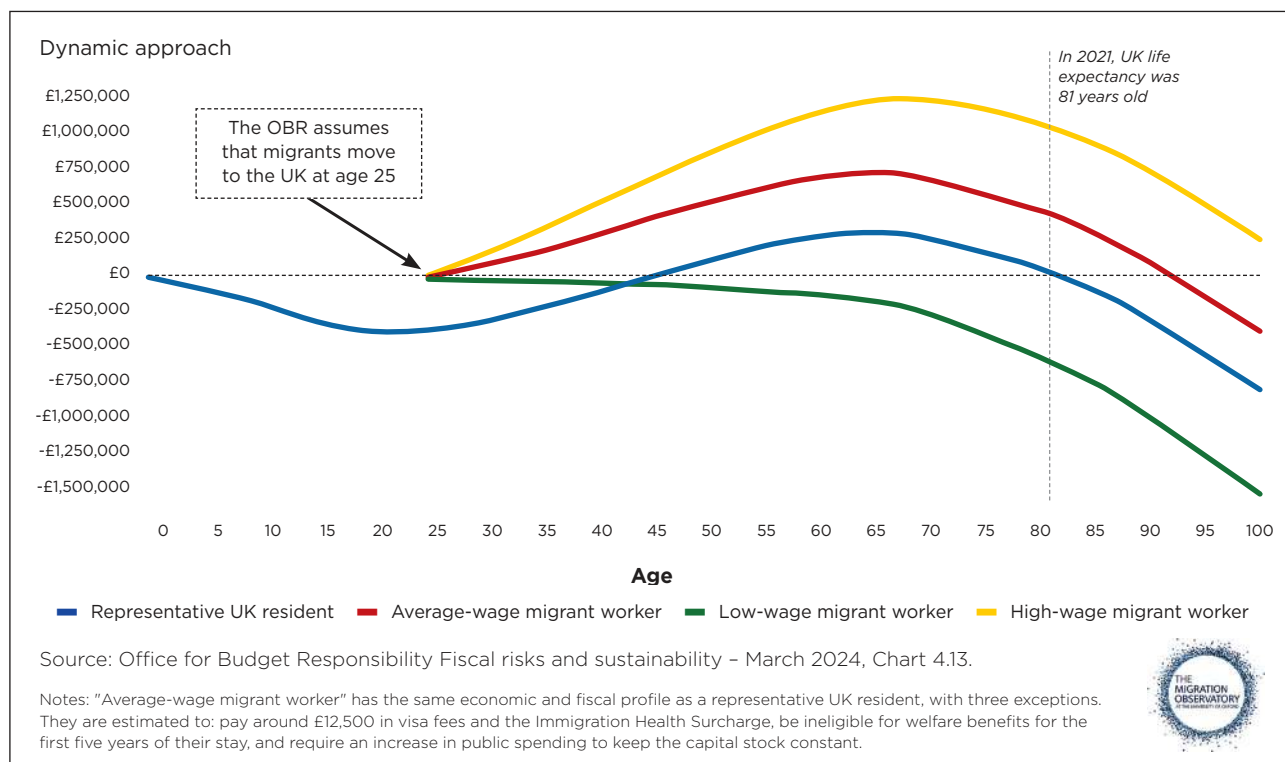
⁶ Peter Vador, “Research: Why Immigrants Are More Likely to Become Entrepreneurs”, *Harvard Business Review*, 4 August 2021, <https://hbr.org/2021/08/research-why-immigrants-are-more-likely-to-become-entrepreneurs>.

⁷ “The Fiscal Impact of Immigration on the UK”, Oxford Economics, 18 September 2018, <https://www.oxfordeconomics.com/resource/the-fiscal-impact-of-immigration-on-the-uk/>.

⁸ Christian Dustmann, Tommaso Frattini and Ian Preston, “The Effect of Immigration along the Distribution of Wages”, Centre for Research and Analysis of Migration, University College London, 2008, https://www.ucl.ac.uk/~uctpb21/Cpapers/CDP_03_08.pdf.

⁹ Stephen Nickell and Jumana Saleheen, “The Impact of Immigration on Occupational Wages: Evidence from Britain”, Federal Reserve Bank of Boston, October 2008, <https://www.bostonfed.org/publications/research-department-working-paper/2008/the-impact-of-immigration-on-occupational-wages-evidence-from-britain.aspx>.

Figure 1: Cumulative fiscal impacts, by scenario and age (Credit: Oxford Migration Observatory)



composition of migrants “has shifted more towards groups that have historically had lower participation rates (e.g., students and dependants¹⁰).” Traditional economics assumes that all interactions are through the price system, but in reality, network structures matter and non-price interactions (including social relationships, trust and reciprocity) *really matter*. It is most efficient to simply list the assumptions that policymakers got wrong:

- That a migrant worker is comparable to a native worker in all relevant respects except that he may have a different level of productivity.
- That levels of provision of housing would increase freely to expand supply.
- That levels of privately supplied utilities such as water, waste and electricity would increase freely to expand supply.
- That levels of public services would increase in line with expanding populations.
- That the availability of cheap foreign labour would not lead to a decapitalisation of production methods.
- That the availability of cheap foreign labour would not therefore lead to decreased productivity for native workers.
- That the availability of cheap foreign labour would not cause native unemployment *regionally*.
- That social trust would not be damaged by levels of immigration, leading to higher transaction costs, higher crime or higher difficulty in complex transactions.¹¹
- That immigration patterns would produce areas of high foreign-born population, often from particular diasporas, that become less integrated in the rest of the economy.

¹⁰ Net migration forecast and its impact on the economy – Office for Budget Responsibility, <https://obr.uk/box/net-migration-forecast-and-its-impact-on-the-economy/>.

¹¹ See “World Development Report 2015: Mind, Society, and Behavior”, The World Bank, 2015, <https://www.worldbank.org/en/publication/wdr2015>.

- That there are no costs to economic and social integration of migrants except education.¹²
- That immigrants come to the UK principally to work.

Some of the factors that these purely economics-based analyses overlook are the societal consequences of immigration. This is a problem. Superficially, the impacts of immigration can be treated in macroeconomic terms. But the deeper links to national security are undeniable when viewed through a securitisation lens.

Securitisation itself is not a new concept. A product of the Copenhagen School of security studies and particularly of Ole Waever, the theory proposed that an issue or anxiety is discursively constructed into a ‘security’ threat. States don’t immediately know their security risks. Issues of security become so when actors, including states and individuals, frame an issue as a dire and potentially existential threat which requires stronger countermeasures. The security agenda is therefore dependent upon perceptions and upon convincing others of the severity and urgency of a threat. This also means that some artificial security risks can be ‘desecuritized’ if their basis can be successfully interrogated on both sides of a conflict. The richness of securitisation theory allows us to understand issues themselves as real but to allow their perception and categorisation as ‘security’ threats to be caused by social construction. It also allows us to understand how real and present threats to national interests, including for example the societal consequences of immigration, can “lurk” unrecognised despite requiring decisive action.¹³

That our society has failed to recognise immigration as a security threat speaks both to a willingness to overlook concrete non-economic risks and to the widespread adoption of shaky assumptions about the economic advantages of immigration. Indeed, every single one of the above assumptions is either entirely or substantively wrong. Migrant workers differ from native workers not just in their productivity but also in their willingness to supply their labour at different prices. They differ, especially due to visa requirements, in which industries they are willing and able to work in. They differ in social capital, and they differ in their consumption choices, particularly in housing, with both native and immigrant populations preferring to live separately from one another.¹⁴

Housing supply in the UK has not been able to expand freely due to prohibitive planning laws, a financial system which requires high house prices to avoid a financial crisis, and through the event of unprecedented levels of mass migration. The downstream effects of this one oversight are enormous. It massively increases rents, such that any theoretical gains to income levels are consumed by higher payments for housing. It decreases the mobility of crucial high-productivity labour. It creates economic rents for landholders. It increases asset prices in ways that make housing unaffordable for natives who might otherwise have been able to afford it and creates incentives to subdivide housing into ever-smaller lots. This means that, just as we are now familiar with ‘shrinkflation’ when it comes to groceries, ‘shrinkflation’ is also affecting our real estate, and therefore decreasing the British quality of life in ways that do not appear in GDP figures.

The Government’s 300,000 a year housebuilding target included, as *The Telegraph* reported,¹⁵ anticipated net migration figures of 170,000, leading to demand for 72,000 new homes (2.36

¹² “Economic and social integration of migrants”, OECD, <https://www.oecd.org/en/topics/economic-and-social-integration-of-migrants.html>.

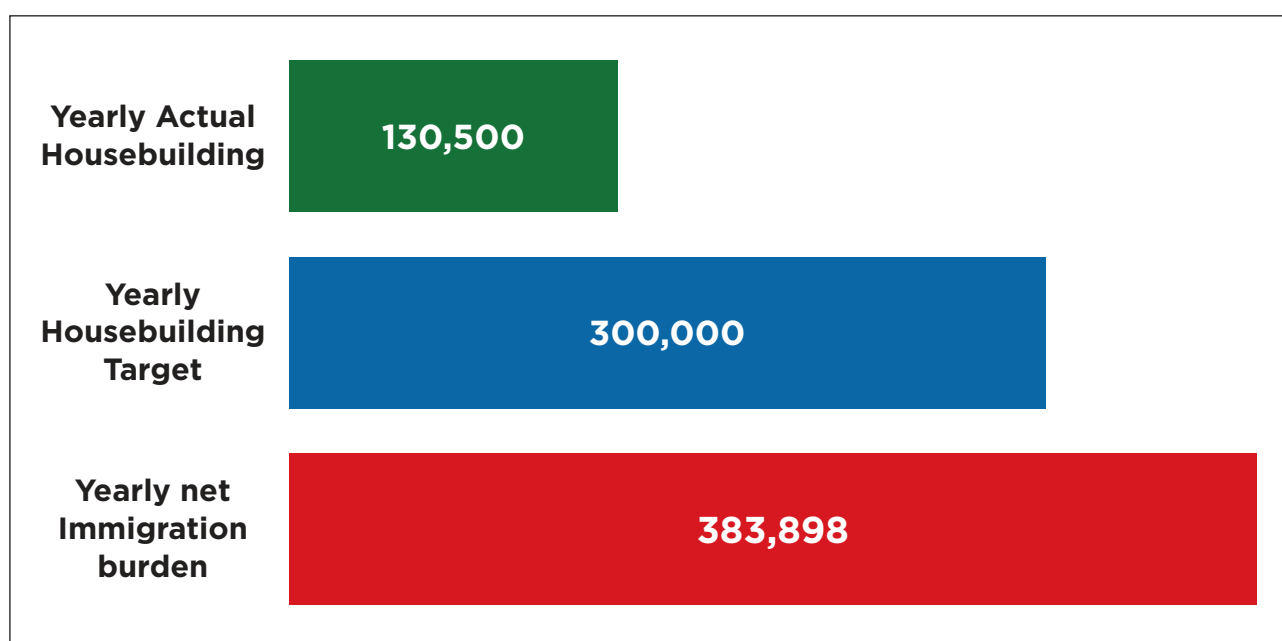
¹³ Otukoya, “The securitization theory”.

¹⁴ Matt Payton, “British towns and cities are becoming more segregated, study finds”, *The Independent*, 3 November 2016, <https://www.independent.co.uk/news/seggregated-ethnic-minorities-uk-towns-cities-society-white-majority-british-a7395491.html>.

¹⁵ Charles Hymas and Melissa Lawford, “Migration has failed to drive economic growth, warns report”, *The Telegraph*, 8 May 2024, <https://www.telegraph.co.uk/business/2024/05/08/migration-failed-economic-growth-made-housing-crisis-worse/>.

persons per home). In reality, the latest figures show net migration to the UK of 906,000 people.¹⁶ Even if the UK exceeds its massive housebuilding targets, it still won't be enough to accommodate these 906,000 people (see Figure 2). 67% of private rentals in London are headed by someone born outside the UK, and immigration in 2022 alone drove up rents by nearly 10%.¹⁷ In the decade leading to 2021, the number of GPs increased by 4% while the population increased by 6.6%. Assumptions about private sector provision were also wrong. As a Centre for Policy Studies (CPS) report found,¹⁸ the UK's capacity to generate electricity fell by 14.2% in the same period. The supply of doctors, houses, electricity, transport infrastructure and hospitals is, *emphatically*, not elastic enough to deal with immigration at anywhere near the scale Britain is experiencing. Economists' and policymakers' estimates were what we call "long run" analyses, run against a hypothetical future economy with higher levels of provision. As Keynes said, "in the long run, we are all dead" – the economy may build that new hospital eventually, but the individuals living in the present will be paying for those hospitals, and the existing ones, for a long time yet.

Figure 2: Yearly net migration housebuilding burden



The Office for National Statistics (ONS) believes the population will rise from 67m in 2021 to 73.7m by 2036, with 91% of that rise directly linked to immigration.¹⁹ Of the remaining 9%, a significant proportion will be children born to migrants. This level of population increase, matched with low-to-negative economic growth, makes investment and public spending plans high-on impossible in per capita terms.

A consequence of ignoring the distinction between migrants and native workers is that immigration policy has largely omitted that most immigration is not for the purposes of work. If we ignore the external costs of higher rents and overburdened public services, the direct fiscal costs of care workers bringing their dependents was so high that James Cleverly's decision to

¹⁶ Hymas and Lawford, "Migration has failed to drive economic growth, warns report".

¹⁷ Imogen Pattison, "High immigration helps explain record rent rise", *Capital Economics*, 30 May 2023, <https://www.capitaleconomics.com/publications/uk-housing-market-update/high-immigration-helps-explain-record-rent-rise>.

¹⁸ Robert Jenrick MP, Neil O'Brien MP and Karl Williams, "Taking Back Control", *Centre For Policy Studies*, 8 May 2024, https://cps.org.uk/wp-content/uploads/2024/05/CPS_TAKING_BACK_CONTROL_PDF.pdf.

¹⁹ "Britain facing £100bn tax jump as immigration surge stretches public finances, IFS warns", *The Telegraph*, 27 February 2024, <https://www.telegraph.co.uk/business/2024/02/27/100bn-tax-jump-immigration-surge-stretch-public-finances/>.

restrict it saves £29.79bn,²⁰ which is more than the increase in National Insurance contributions raises in a year. Migrants from third-world countries are also significantly different to EEA migrants. Static estimates of the fiscal effects of migrants from Oxford Economics in 2018 had EEA migrants making a net fiscal contribution of £4.7bn and non-EEA migrants having a net fiscal cost of £9bn per year.²¹ Unfortunately in the years since 2018, a larger percentage of migrants have come from non-EEA countries and a larger proportion have arrived for reasons other than work.²² Indeed, the CPS finds that of the two million non-EU nationals who came over the last five years, only 15% came principally to work.²³

While the failure of most of the assumptions above speak for themselves, productivity in particular deserves a fuller explanation. Much of the prior consensus about immigration and productivity comes from papers that are best exemplified by that of Jaumotte, Koloskova and Chaman Saxena.²⁴ To quote from their abstract verbatim, the paper “finds that immigration significantly increases GDP per capita in advanced economies, that both high- and lower-skilled migrants can raise labor productivity, and that an increase in the migrant share benefits the average income per capita of both the bottom 90 percent and the top 10 percent of earners, suggesting the gains from immigration are broadly shared.”²⁵ However, in both this report and others like it, the authors note that “we should be careful about generalizing our results to all countries”. Many mechanisms through which it was proposed that low-skill immigration might improve productivity are completely inapplicable to the UK, including, for example, paid domestic help freeing up labour from housework. They also show a worrying disregard for the proper definition of productivity – that is, output *per hour worked*. The vast majority of research finds instead that while high-skill immigration does boost productivity, low-skilled immigration does not.^{26, 27}

It is plausible that the promulgation of the belief that low-skilled immigration benefits British citizens economically is the single leading contributor to Britain’s failure to securitise the issue of mass low-skilled immigration. After all, the perception that there is no threat may persist if society believes it is becoming materially richer and more productively capable as a result. The mounting evidence that this is not true should be a clear warning that the security implications of mass immigration have passed under the radar.

Non-economic assumptions made, often implicitly, include:

- that politics would not become increasingly sectarian as a result of immigration.^{28, 29}

²⁰ Carlos Vargas-Silva, Madeleine Sumption and Ben Brindle, “The Fiscal Impact of Immigration in the UK”, *The Migration Observatory*, 25 October 2024, <https://migrationobservatory.ox.ac.uk/resources/briefings/the-fiscal-impact-of-immigration-in-the-uk/>.

²¹ “The Fiscal Impact of Immigration on the UK”, Oxford Economics, p.22.

²² “Net migration forecast and its impact on the economy”, Office for Budget Responsibility, March 2024, <https://obr.uk/box/net-migration-forecast-and-its-impact-on-the-economy/>.

²³ Hymas and Lawford, “Migration has failed to drive economic growth, warns report”.

²⁴ Florence Jaumotte, Ksenia Koloskova and Sweta Chaman Saxena, “Impact of Migration on Income Levels in Advanced Economies”, Spillover Notes, International Monetary Fund, 24 October 2016, <https://www.imf.org/en/Publications/Spillover-Notes/Issues/2016/12/31/Impact-of-Migration-on-Income-Levels-in-Advanced-Economies-44343>.

²⁵ Ibid.

²⁶ Gianmarco I.P. Ottaviano, Giovanni Peri and Greg C. Wright, “Immigration, trade and productivity in services: evidence from U.K. firms”, *Journal of International Economics* 112 (2018), https://eprints.lse.ac.uk/87333/1/Ottaviano_Immigration%20trade_2018.pdf.

²⁷ Ekrame Boubtane, Jean-Christophe Dumont and Christophe Raul, “Immigration and economic growth in the OECD countries 1986–2006”, *Oxford Economic Papers* 68, no. 2 (2016), <https://www.jstor.org/stable/44122852>.

²⁸ Camilla Turner, “Pro-Palestinian MPs become ‘sixth largest’ party in shock Labour defeats”, *The Telegraph*, 5 July 2024, <https://www.telegraph.co.uk/politics/2024/07/05/pro-palestinian-mps-become-sixth-largest-party-labour-loss/>.

²⁹ Rakib Ehsan, “The successful Muslim Vote campaign is a snapshot of the future of British politics”, *The Telegraph*, 5 July 2024, <https://www.telegraph.co.uk/news/2024/07/05/britain-has-entered-a-new-era-of-sectarian-politics/>.

- that large foreign-born populations would not make the UK a magnet for illegal immigration³⁰ that would cost £14bn a year by 2022^{31, 32} and a further £4.7bn a year in asylum support.³³
- that a large illicit black-market for labour would develop where those without permission to work do so in conditions that at best undercut legal workers and at worst represent conditions of modern slavery.^{34, 35}
- that widespread segregation would not occur, including minorities choosing to live in concentrated areas and white majorities vacating urban centres.³⁶ That this segregation would not lead to incongruous and destabilising differences in cultural, linguistic and social outlook, including attitudes to society and what its fundamental collective interests are.

Indeed, the Resolution Foundation’s demographic report coined the term “demographic divergence”³⁷ to describe the phenomenon in the UK whereby rural white areas are becoming older while minority-majority areas are getting younger. The term refers to localities where taken together, groups that are minorities nationally form a majority. Resolution Foundation highlighted that the majority of births are coming from low-income and ethnically diverse local authorities. As early as 2016, 80% of London’s immigrant families had their children in schools with high concentrations of other immigrant or disadvantaged pupils, according to the Casey Review.³⁸ One eye-opening revelation in the Casey Review was how pupils of one inner-city school believed the UK to be up to 90% Asian, reflecting their experience of racial segregation.³⁹

Securitisation, then, as a foreign policy doctrine means taking the insights of securitisation theory and recalibrating our national defence and statecraft to recognise the full breadth of threats facing the UK. It requires critically interrogating those issues that are securitised and critically evaluating those that are not. Previous assumptions about immigration’s net returns have proven to be misleading. It is now clear that the threat of immigration should be included in the UK’s new securitisation nexus, with its impact on the domestic economy and overall life quality of the British populous equating to a strategic threat. Yet, as we will see, there is much that our enemies are already doing to subvert our attempts to recognise threats and organise a response to them.

³⁰ Conor James McKinney, “Why do migrants and asylum seekers want to come to the UK?”, *Full Fact*, 31 October 2016, <https://fullfact.org/immigration/why-do-migrants-and-asylum-seekers-want-come-uk/>.

³¹ “Illegal Immigration: Costs”, Hansard – UK Parliament, 7 May 2024, <https://hansard.parliament.uk/commons/2024-05-07/debates/64997110-88BF-4157-8177-D9687A25841B/IllegalImmigrationCosts>.

³² Impact Assessment, GOV.UK, 26th June 2023, The 2023 Assessment used 2022’s immigration figures.

³³ “An Overview of the Home Office for the new Parliament 2023-24”, National Audit Office, October 2024, <https://www.nao.org.uk/wp-content/uploads/2024/10/home-office-overview-2023-24.pdf>.

³⁴ Ben Endley and Graeme Culliford, “How loophole costing just £70 a week allows migrants to skip background checks to work illegally for Deliveroo & JustEat”, *The Sun*, 14 December 2024, <https://www.thesun.co.uk/news/32307532/loophole-migrants-work-illegally-deliveroo-justeat/>.

³⁵ Rt Hon Robert Jenrick MP, “Public letter: Illegal Working in the Food Delivery Industry”, 14 November 2023, https://assets.publishing.service.gov.uk/media/655389d43718980013d296b8/Minister_public_letter_to_online_delivery_platforms-_FINAL_.pdf.

³⁶ Carolina V. Zuccotti, “Are ethnic minorities in the UK spatially integrating?”, *Migration Policy Centre*, 22 July 2019, <https://migrationpolicycentre.eu/ethnic-minorities-uk-spatially-integrating/>.

³⁷ Charlie McCurdy, “Ageing, fast and slow: When place and demography collide”, *Resolution Foundation*, October 2019, <https://www.resolutionfoundation.org/app/uploads/2019/10/Ageing-fast-and-slow.pdf>.

³⁸ Louise Casey, “The Casey Review: A review into opportunity and integration”, Department for Communities and Local Government, December 2016, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/575973/The_Casey_Review_Report.pdf.

³⁹ Ibid.

Chapter 2: The ‘end of history’ and the underestimation of the authoritarian threat

The lens of securitisation allows us to understand that our foes have used a range of methods, from subtle to direct action, to sculpt Western attitudes and perceptions. A new securitisation dynamic would, therefore, clarify the threat posed by these actors by recognising the effects and implications of these myriad actions. With a clearer realisation of our position vis-a-vis authoritarian nations like China and Russia, it will be easier to confront these nations with greater self-confidence and consistency – strengthening Britain’s strategic hand going forward.

The “end of history” wasn’t exactly coined by the Francis Fukuyama (Georg Wilhelm Friedrich Hegel used the term in a not-so-dissimilar context) but the seminal idea, as it is now understood, belongs to him. What made Fukuyama, the political scientist and Sovietologist, into the great public intellectual we know today, is the way in which his political theory seemed to capture perfectly the mood music of the *Pax Americana*.

The ideal state – a liberal democracy – is the pinnacle of political organisation, and with the fall of the Soviet Union, Western liberal democracies would ultimately become unsurpassable. It would be remiss to characterise Fukuyama as implying the dominance of a specific liberal state. Not even the United States is intended as his particular subject. Rather, he is deifying the *idea* of liberal democracy. His world view saw Russia’s and China’s authoritarianism as fundamentally weak, vulnerable to centralised bad decision making. It suggested that they would, eventually, be outcompeted by states which could successfully build a liberal democracy.

Fukuyama’s philosophy was more subtle than it is given credit for and was by no means naive. There is good evidence that China’s authoritarian and top-down economic plan will run out of road once export-driven growth dries up.⁴⁰ Where Fukuyama may have gone wrong, unfortunately, is in underestimating the rate at which technological progress has bulwarked authoritarian regimes against their own citizens, and in overestimating the resolve of Western democracies. The Western world post-9/11, post-Iraq and post-Afghanistan is simply not as confident as it was at the end of the 20th century, nor as assured as it needs to be going forward.

Around the time of Fukuyama’s *The End of History and the Last Man*, this attitude to politics, international relations and foreign policy produced a certain naivety about the rising threat of Russia and China. Perhaps without an enemy in the form of the Soviet Union, the West allowed itself to soften its stance and indulge in the very sophisticated pursuit of self-deprecation. Strategic and moral defeat in Iraq, coupled with the humbling effects of 9/11, affected a culture of insecurity, with self-blame and a critical outlook on Western interventionism becoming fashionable.

Disentangling this self-inflicted naivety from concerted efforts by China and Russia to contaminate Western politics and academia is difficult. It is a fundamental and unchanging goal of authoritarian regimes to disarm the West and to have us underestimate their threat.⁴¹

For a long time, this strategy has succeeded. Until 2024, Confucius Institutes operated from 30 UK university campuses, policing views on China and allegedly being involved in the theft of

⁴⁰ Lingling Wei, “Xi Digs In With Top-Down Economic Plan Even as China Drowns in Debt”, *The Wall Street Journal*, 23 December 2024, <https://www.wsj.com/world/china/china-xi-debt-economic-plan-13aaeecl>.

⁴¹ Raksha Kumar, “How China uses the news media as a weapon in its propaganda war against the West”, *Reuters Institute for the Study of Journalism*, 2 November 2021, <https://reutersinstitute.politics.ox.ac.uk/news/how-china-uses-news-media-weapon-its-propaganda-war-against-west>.

research.⁴² Lord Patten, former Chancellor of Oxford University, drew attention to “evidence of some of them trying to get involved and manipulate what is happening in the university as a whole.”⁴³ Indeed, Patten was the last governor of Hong Kong, present for that moment when Britain withdrew in hope that China would respect its obligations to Hong Kongers. His intervention, given his important role in the handover, should give us pause for thought. The rapprochement between the UK and China from 2010 arguably until June 2020, led by the now Lord Cameron as Prime Minister, was a strategic error. In 2015, Chancellor George Osborne declared that UK-China relations had entered a “golden era”. Despite this, Chinese spying continued throughout the period.⁴⁴ Indeed, the head of the UK Chinese Business Association, serving as a “bridge” between the two nations, was notoriously unmasked as alleged spy Yang Tengbo⁴⁵ who developed a close relationship with Prince Andrew.

The most critical impact of this rapprochement was for cybersecurity. China has used its cyber expertise to steal valuable research and technology from British companies, and also as a direct operational threat against UK military and civilian infrastructure.⁴⁶ This includes attacks against MPs and the Electoral Commission.⁴⁷ However, the UK Government’s press release claiming that the Government holds Chinese state-affiliated organisations responsible for malicious cyberattacks is now disclaimed by a notice that “This was published under the 2022 to 2024 Sunak Conservative Government”.⁴⁸ Starmer has declined to call China a ‘threat’ since entering No.10, and is said to want a “new and pragmatic relationship” with China.⁴⁹ The UK lost years from 1997–2016, during which inaction on Ukraine and naivety with China robbed us of precious time to wrest our strategic independence from Russian oil and Chinese supply chains.

The deeper damage this miscalculation did to British foreign policy and, ultimately, British economic growth saw the deindustrialisation of key industries. While steel gets a lot of attention, it is an abundant resource and our long-term allies produce lots of it. Where Britain should worry is on our key supplies of rare earth metals. China supplies 98% of Europe’s rare earth needs.⁵⁰ These minerals are critical for technological progress and particularly for the green energy transition. Without securing access to these minerals in the global market, not only will Western green targets be for the birds, but we’ll also see China continue to dominate solar and electric vehicle production on the economic front.

The Center for Strategic and International Studies (CSIS) reports that the US defence industrial base is unprepared for a potential conflict with China.⁵¹ With missile stockpiles already depleted

⁴² “EU wants spies on university campuses to fight Chinese tech espionage”, *Politico*, May 23, 2024, <https://www.politico.eu/article/academic-research-campus-eu-universities-intelligence-services-china-spying-technology/>.

⁴³ Poppy Wood, “Funding cut for ‘Trojan horse’ Chinese institutes at UK universities”, *The Telegraph*, 21 September 2024, <https://www.telegraph.co.uk/news/2024/09/21/funding-cut-trojan-horse-chinese-institutes-uk-universities/>.

⁴⁴ Nick Eardley and Gordon Corera, “China spy claims as Parliament researcher arrested”, *BBC News*, 10 September 2023, <https://www.bbc.co.uk/news/uk-66765759>.

⁴⁵ Frances Mao, “Yang Tengbo: Who is alleged Chinese spy linked to Prince Andrew?”, *BBC News*, 16 December 2024, <https://www.bbc.co.uk/news/articles/c3dx1yzzzrlo>.

⁴⁶ Eren Waitzman, “UK: Long-term strategic challenges posed by China”, House of Lords Library, 3 October 2023, <https://lordslibrary.parliament.uk/uk-long-term-strategic-challenges-posed-by-china/>.

⁴⁷ Sam Francis and Jennifer McKiernan, “UK imposes sanctions after Chinese-backed cyber-attacks”, *BBC News*, 26 March 2024, <https://www.bbc.co.uk/news/uk-politics-68654533>.

⁴⁸ “UK holds China state-affiliated organisations and individuals responsible for malicious cyber activity”, GOV.UK, 25 March 2024, <https://www.gov.uk/government/news/uk-holds-china-state-affiliated-organisations-and-individuals-responsible-for-malicious-cyber-activity>.

⁴⁹ “Where does Starmer stand on China now?”, *The Telegraph*, 18 November 2024, <https://www.telegraph.co.uk/opinion/2024/11/18/where-does-starmer-stand-on-china-now-xi-jinping-uk/>.

⁵⁰ Eldaniz Gusseinov and Abakhon Sultonnazarov, “Central Asia’s Critical Raw Materials: The Next Frontier in Global Power Rivalry?”, *The Institute for War and Peace Reporting*, 3 April 2024, <https://cabar.asia/en/central-asia-s-critical-raw-materials-the-next-frontier-in-global-power-rivalry>.

⁵¹ Seth G. Jones, “The U.S. Defense Industrial Base Is Not Prepared for a Possible Conflict with China”, CSIS, 23 January 2023, <https://features.csis.org/preparing-the-US-industrial-base-to-deter-conflict-with-China/>.

due to the wars in Ukraine and the Middle East, the CSIS war games show the US would likely run out of long-range precision guided missiles in less than one week, making it impossible for the US to engage in sustained conflict. The Chinese are aware of supply problems in the US industrial base. Precarious access to these metals limits the range of sustainable US military and political options and will embolden the Chinese to take greater risks in Taiwan and the South China Sea.

Gallium is a metal with “critical vulnerability”⁵² for the free world. China produces 98% of the world’s supply.⁵³ Its properties make it indispensable for advanced military equipment and for the specialised high-performance semiconductors that power the Global Positioning System (GPS). Gallium-based chips power 5G network receivers, solar cells and electric vehicles. They are critical for missile defence systems including the Lower-Tier Air and Missile Defence Sensors (LTAMDS) that are integrated into Patriot missile defence systems.⁵⁴ Press releases from designers Raytheon describe the system as “transformational” for its precision and ability to detect threats at significantly longer distances⁵⁵ and as crucial for the protection of US military assets in the event of war with China, Russia or Iran. Put short, consumer and military-facing industries expect to require more gallium as performance requirements push beyond the limits of silicon-based chips.⁵⁶ As the CSIS points out, US Geological Survey analysis shows that even a 30% disruption to the supply of gallium could wipe \$602bn from US GDP – or 2.1%.⁵⁷

The underestimation of the authoritarian threat led to the undervaluation of the rules-based international order as a cornerstone of British foreign policy. The threat to this legal order, from which Britain benefits enormously, has developed partly because of the lack of a robust will to defend it, owing in part to deliberate foreign attempts to subvert the recognition of the true lurking threat they pose.

A fresh British securitisation doctrine requires, at one level, a renewed understanding that our enemies are capable of leveraging perception and information against us and to guard against this when formulating foreign policy goals and defining security risks. In practice, this may manifest as a suspicion of any diplomacy which involves trading hard power for soft, or the elevation of international goals over national interests. Yet this securitisation paradigm also allows us to see how severe threats to national security can lurk in trade and environmental policy. Doctrine therefore demands foresight, words and action to spell out and securitise the threats that might emerge and how policy changes and diversification can deliver that security. No example is clearer than that of modern British energy policy.

⁵² Matthew P. Funaiolo, Brian Hart and Aidan Powers-Riggs, “De-risking Gallium Supply Chains: The National Security Case for Eroding China’s Critical Mineral Dominance”, *CSIS*, 3 August 2023, <https://www.csis.org/analysis/de-risking-gallium-supply-chains-national-security-case-eroding-chinas-critical-mineral>.

⁵³ Madhumitha Jaganmohan, “Distribution of gallium production worldwide in 2022, by country”, *Statista*, 6 June 2024, <https://www.statista.com/statistics/1445285/gallium-share-of-production-worldwide-by-country/>.

⁵⁴ “Lower Tier Air and Missile Defense Sensor (LTAMDS)”, *Missile Defense Advocacy Alliance*, 24 July 2020, <https://missiledefenseadvocacy.org/defense-systems/lower-tier-air-and-missile-defense-sensor-ltamds/>.

⁵⁵ “How the new LTAMDS radar will thwart evolving air defence threats (Studio)”, *Shephard*, 12 July 2022, <https://www.shephardmedia.com/news/digital-battlespace/how-the-new-ltamds-radar-will-thwart-evolving-air-defence-threats-studio/>.

⁵⁶ Desire Athow, “How GaN is changing the future of semiconductors”, *TechRadar*, 31 March 2022, <https://www.techradar.com/news/how-gan-is-changing-the-future-of-semiconductors>.

⁵⁷ Ross L. Manley, Elisa Alonso and Nedat T. Nassar, “A model to assess industry vulnerability to disruptions in mineral commodity supplies”, *Resources Policy* 78 (September 2022): 102889, <https://www.sciencedirect.com/science/article/pii/S0301420722003348>.

Chapter 3: The prioritisation of environmental activism over energy security

There is a key need to securitise energy dependency. It is clear to see how the elevation of global climate concerns, especially with the use of language including the climate *emergency* or the climate *crisis*, has securitised climate change. This is no bad thing. Climate change will have profound impacts on resource availability, population movements, food security and the incidence of acute natural disasters. Yet it has come at the cost of the underappreciation of the economic and military-industrial risks of energy dependency and energy poverty.

Just as we need to decouple our supply chains from Chinese manufacturing and rare earth metals, we need to decouple our energy supply from Russian gas. What should also be noted at first pass is that the refusal of our geopolitical rivals to decarbonise with us compromises many aspects of our security and capacities relative to them.

The fact that North Sea Gas is undercapitalised and underinvested should, by this point, be obvious. Damage to production has been inflicted by Westminster, particularly through green levies on bills and new windfall taxes, and by successive devolved SNP administrations in Scotland. This has been driven by an activist belief, quite divorced from economic reality, that by starving the industry of investment, and grinding production to a halt, Britain would switch to renewable power. To elaborate, this plan involves, by design, pushing up energy prices until green production is viable. In reality, as offshore gas gradually goes offline, Britain simply imports more of the gas it needs from abroad.⁵⁸

Fundamental technical limitations of green technologies, as well as a lack of battery capacity and infrastructural investments in the grid, will mean thousands of pounds per household are paid instead to overseas companies and governments. As the Energy and Climate Intelligence Unit Report finds, “gas import dependence [is] potentially growing by 60% by 2035.”⁵⁹

The strategy to cut emissions, by analogy, is like trying to lose weight by banning cooking. We’ll just end up buying pre-cooked food – probably less healthy – from the shops. It doesn’t change our preferences; it doesn’t change the reality of our diet. It just makes us poorer, and ultimately more vulnerable. Our annual gas imports, mostly from Norway, which drills and expands the opposite side of the very same oil fields that we are decommissioning, cost £100bn a year.⁶⁰ Obviously there is no net decarbonisation effect by shifting production to Norway, except that costs are higher and therefore usage may be lower by energy starving the UK economy. It is superficial and ill-thought-out climate activism with a disastrous economic rationale. By consuming our national income unnecessarily, we reduce output directly as well as downstream in all industries which rely on increasingly unaffordable energy supplies. Yet Norway is the best-case scenario for an import energy partner. Extending this model further afield could be even more disastrous. As *The Telegraph* reports, Andreas Schroeder, head of energy analytics at the Independent Commodity Intelligence Service (ICIS), has warned that “Dusk for Norway is dawn for Russia”.⁶¹ As Norwegian production is expected to fall, especially

⁵⁸ “Rising Gas Imports and the UK’s Balance of Trade”, *Energy & Climate Intelligence Unit*, 11 May 2023, <https://eciu.net/analysis/reports/2023/rising-gas-imports-and-the-uks-balance-of-trade>.

⁵⁹ Ibid.

⁶⁰ Hamish Penman, “UK annual energy imports bill crashes through £100bn threshold for first time ever”, *Energy Voice*, 22 March 2023, <https://www.energyvoice.com/oilandgas/north-sea/491389/uk-annual-energy-imports-bill-crashes-through-100bn-threshold-for-first-time-ever/>.

⁶¹ “Dusk for Norway is dawn for Russia: The looming gas crisis facing the West”, *The Telegraph*, 16th January 2025, <https://www.telegraph.co.uk/business/2025/01/16/uk-energy-insecurity-norwegian-gas-reserves-decline/?msockid=3cc2129489af6eba2a13070588886f00>.

as the country has been led since 2021 by a coalition committed to following Britain into fossil fuel dependency,⁶² Russia is the only exporter positioned to take over supply.

Gas is by no means the only axis in the miscalculation of UK energy policy. Environmental activism has its roots in the anti-nuclear movements of the 20th century. Indeed, the UK's Green Party began with the PEOPLE Party. Founded in November 1972,⁶³ this was an expressly anti-nuclear energy party on the far left, which also advocated for “zero growth” economics. The same is substantively true of Die Grünen (Germany), Les Verts (France), the FLV (Italy) and the Green Party of Canada. In the mid-1980s, the anti-nuclear movement gained momentum after higher-than-normal numbers of deaths from children's leukaemia were reported from residents near several types of nuclear facility. It was further bolstered after the nuclear disaster at Chernobyl. To this day, most Greens continue to oppose nuclear energy.^{64, 65}

Securitisation theory allows us to see how these activist forces have influenced and then undermined our perception of our own interests and of the nature of the threats we face. Put into practice, securitisation doctrine demands that we recognise such groups as potentially compromising and put into place measures to deradicalise those who seek to securitise one issue at the expense of all others.

This may sound like ancient history, but unfortunately these ideas were the first players in the new field of climate change research. With a first mover advantage, unscientific and radical ideas permeate the entire policymaking literature. Nuclear energy was excluded from the UK Government's Green Financing Framework in 2021 because, quite shockingly, it succumbed to long-held activist preconceptions that nuclear energy is not clean. “Recognising that many sustainable investors have exclusionary criteria in place around nuclear energy, the UK Government will not finance any nuclear energy-related expenditures under the Framework.”⁶⁶ As if to hammer home how fundamentally unserious and bereft of capable thinkers it has become, the Treasury report begins with hollow words about the “UK as a Global Climate and Environmental Leader”.⁶⁷

This childish activism has left Britain with the most expensive electricity prices in the developed world.⁶⁸ Power is now four times more expensive than in the United States. Britain is therefore deindustrialising despite the fact that its industry would have remained competitive with continued investment in natural gas and nuclear energy production. This folly has been compounded by bad decisions made by the Department for Business and Trade.⁶⁹ A loss-making steel plant owned by Tata Steel, which described the UK steel industry as “underinvested and overmanned”,⁷⁰ will, according to fantasy economics, be kept afloat by

⁶² “Norway's centre-left defeats Solberg's conservative rule”, *BBC News*, 14 September 2021, <https://www.bbc.com/news/world-europe-58555690>.

⁶³ “Green Party (UK)”, *Wikipedia*, [https://en.wikipedia.org/wiki/Green_Party_\(UK\)#PEOPLE,_1972%E2%80%931975](https://en.wikipedia.org/wiki/Green_Party_(UK)#PEOPLE,_1972%E2%80%931975).

⁶⁴ Lucy Jackson, “Greens: Nuclear will ‘leave legacy of debt and radioactive waste’”, *The National*, 2 July 2024, <https://www.thenational.scot/news/24423528.greens-nuclear-will-leave-legacy-debt-radioactive-waste/>.

⁶⁵ David Leask, “SNP and Greens vow to block new nuclear reactors in Scotland”, *The Times*, 27 September 2021, <https://www.thetimes.com/article/snp-and-greens-vow-to-block-new-nuclear-reactors-in-scotland-vnx9388cz>.

⁶⁶ “UK Government Green Financing Framework”, HM Treasury/UK Debt Management Office, June 2021, https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1002578/20210630_UK_Government_Green_Financing_Framework.pdf.

⁶⁷ *Ibid.*

⁶⁸ Matt Oliver, “Britain paying highest electricity prices in the world”, *The Telegraph*, 26 September 2024, <https://www.telegraph.co.uk/business/2024/09/26/britain-burdened-most-expensive-electricity-prices-in-world>.

⁶⁹ Matt Oliver, “Rescue deal could see Port Talbot steel used for Ed Miliband's giant wind turbines”, *The Telegraph*, 10 September 2024, <https://www.telegraph.co.uk/business/2024/09/10/port-talbot-support-miliband-offshore-wind-plans/>.

⁷⁰ Samuel Osborne, “Serious Fraud Office opens criminal investigation into Tata Steel”, *The Independent*, 8 April 2016, <https://www.independent.co.uk/news/business/tata-steel-serious-fraud-office-opens-criminal-investigation-a6974076.html>.

transitioning to a £1.2bn electric arc furnace, apparently to be powered by the most expensive energy in the world.⁷¹ Of course, the Government is paying to keep it open, at a cost of £500m.

One new quango, called the National Energy System Operator and created by Energy Secretary Ed Miliband, has announced that, given the target to decarbonise the grid by 2030, it will block new projects from joining the energy grid.⁷² This is, in fact, a reasonable response to stop energy providers who, in the knowledge of mass subsidies, could overwhelm the grid, which has no capacity to bear such generation, with countless new projects.

To avoid this chaos, Britain could, and still should, play the more sophisticated game of green energy diplomacy. Securitisation as a policy demands it when we realise the breadth of threats that compete with each other.

Minimising UK energy costs over time, which are an input into *everything*, from farming to manufacturing to households, datacentres and transportation, would entail the securing of international supply chains of rare inputs from uranium and plutonium to gallium and lithium for electro-voltaic panels and batteries. It would involve leveraging the British market to secure trade access in exchange for recognition of environmental standards and joint commitment to decarbonisation. Serious proposals, including the raising and sale of internationally tax-exempt debt for decarbonising investments (effectively a supply-side tax cut) would allow the UK to take a leading role in raising and allocating large portions of global climate finance.⁷³ Leadership would see the UK maintain competitive energy prices through adequate investment in existing, proven technologies that would have allowed us to maintain an industrial base capable of producing the solar, wind and nuclear power infrastructure for the future. Leadership would also see the UK specialise in areas and technologies where it holds an advantage, including on the merits of UK startups like Tokamak Energy and leading laboratories including the Culham Centre for Fusion Energy in Oxfordshire⁷⁴ in the field of nuclear fusion energy. Developing and holding the technologies of the future, and helping to shape the institutions that will govern them while securing cheap energy in the meantime, would have been, and still can be, the correct approach for British green diplomacy.

If the UK continues its current path, even Poland is poised to surpass us economically and militarily within the next decade. The current Government's approach is continuing to undermine the very foundations of our national security and global standing. It is driving capital outflows and reducing business confidence.

Not only is the high-level strategy wrong, but policymakers have failed to understand the critical importance of growth and of keeping input prices low. Britain has decimated its industrial competitiveness just at the moment that it intends to construct thousands of wind turbines. We need investment not just in energy sources but also in distribution – costing hundreds of billions of pounds – and yet successive Governments have failed to encourage investment and are instead making the UK a more hostile place for capital and for investors. This failure to attract investment, uphold Britain's economic and technological competitiveness and secure an affordable energy future presents a significant threat from a securitisation angle. Britain is more dependent than ever before, and thus more vulnerable to exploitation. Incorporating this reality is essential to a pragmatic and future-oriented UK security paradigm.

⁷¹ Oliver, "Rescue deal could see Port Talbot steel used for Ed Miliband's giant wind turbines".

⁷² Jonathan Leake, "Miliband quango to block new businesses from joining power grid", *The Telegraph*, 15 January 2025, <https://www.telegraph.co.uk/business/2025/01/15/ed-miliband-neso-bans-new-businesses-from-joining-grid/>.

⁷³ Wayne Winegarden, et al., "An Economically Sustainable Global Climate Accord", Institute for Free Trade, https://ifreetrade.org/publication/an_economically_sustainable_global_climate_accord.

⁷⁴ Culham Centre for Fusion Energy, <https://ccfe.ukaea.uk/>.

Chapter 4: How our enemies undermine our economies

China is undermining Western economies, particularly those of the US and Australia, through a combination of aggressive economic strategies and covert operations. These actions are part of China's broader goal to achieve economic and technological dominance in the Indo-Pacific region and establish regional hegemony without engaging in direct military conflict. Examples of Chinese exploitation include:

1. **Economic Coercion and Resource Control:** China leverages its dominance in critical minerals and supply chains to manipulate markets, suppress competition and coerce nations economically. For instance, Beijing's actions have targeted Australian industries such as nickel mining, which is key as an input for both civilian and military applications, particularly for the production of stainless steel.⁷⁵
2. **Belt and Road Initiative (BRI):** Through the BRI, China secures control over strategic infrastructure in developing countries, often creating debt traps that allow it to take control of critical assets like ports and railways, as seen in Sri Lanka. Allegations of opaque bidding processes and inflated costs have led to political backlash and project cancellations, such as Malaysia's cancellation of \$22 billion in BRI projects under former Prime Minister Mahathir Mohamad. The COVID-19 pandemic and global market disruptions, including the war in Ukraine, have exacerbated debt crises in low-income BRI countries like Pakistan, Ghana and Zambia, some of which have defaulted or required International Monetary Fund bailouts. Despite these challenges, some nations continue to engage with the BRI due to limited alternatives for infrastructure financing. Environmental concerns have also emerged, as nearly half of BRI investments have been in non-renewable energy, despite China's 2021 pledge to stop building coal-fired power plants abroad.⁷⁶
3. **Espionage and Surveillance:** By integrating low-cost technologies like Huawei's 5G infrastructure, China has gained increased capacity for espionage and sabotage in countries like Indonesia, Thailand and the Philippines. The UK's 5G networks were also significantly compromised by Huawei's 5G technology, something the Boris Johnson Government pledged to completely undo by 2027.⁷⁷ Following new US sanctions that restricted Huawei's access to critical technology, the UK's National Cyber Security Centre reassessed the security implications of Huawei's involvement in its 5G networks. The Government subsequently banned the purchase of new Huawei 5G equipment starting at the end of 2020 and mandated the removal of all Huawei equipment from 5G infrastructure by 2027. This decision aimed to protect the UK's digital infrastructure from potential state-sponsored surveillance and cyber threats. The policy also highlighted broader concerns about over-reliance on a limited number of telecom vendors, spurring efforts to diversify supply chains and strengthen international collaboration to enhance network security and resilience.⁷⁸

⁷⁵ Christian Purefoy, "Military rearmament is just getting started – without enough critical minerals", *The Oregon Group*, 8 November 2023, <https://theoregongroup.com/commodities/nickel/military-rearmament-is-just-getting-started-without-enough-critical-minerals/>.

⁷⁶ "China pledges to stop building new coal energy plants abroad", *BBC News*, 22 September 2021, <https://www.bbc.com/news/world-asia-china-58647481>.

⁷⁷ "Huawei to be removed from UK 5G networks by 2027", GOV.UK, 14 July 2020, <https://www.gov.uk/government/news/huawei-to-be-removed-from-uk-5g-networks-by-2027>.

⁷⁸ Oliver Dowden, "Digital, Culture, Media and Sport Secretary's statement on telecoms", GOV.UK, 14 July 2020, <https://www.gov.uk/government/speeches/digital-culture-media-and-sport-secretarys-statement-on-telecoms>.

4. **Economic Warfare Strategy:** China uses “gray [sic] zone” tactics which blur the lines between peace and war to undermine Western influence. This includes unconventional approaches such as price manipulation, political-economic control and exploiting geopolitical vulnerabilities. Price manipulation was used against Australian critical minerals by leveraging China’s own dominance in the market,⁷⁹ but despite the sanctions and manipulations, Australia successfully diversified its export markets, reducing reliance on China while maintaining strong economic performance. The Albanese Government, which adopted a softer diplomatic tone than its predecessor, saw a thaw in relations in 2023, marked by resumed trade discussions and the first coal shipments to China in two years. China’s shift likely reflects its broader strategy to counter US containment efforts and preserve globalisation, as well as potential leverage from Australia’s tacit support for China’s bid to join the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), of which the UK is now a member. The episode highlights the challenges of economic sanctions, showing they can harm both the target and the instigator, while reinforcing the importance of security policy in navigating such hostilities.

The impact of Donald Trump’s return to international diplomacy has significant ramifications for the economic warfare currently unfolding. Trump’s calls to decouple from China, not to mention his 60% tariff on the regime,⁸⁰ represents a total shift in the structure of the global economy. While it would limit damage from Chinese economic warfare, and force the development of alternative sources of rare earth and other key inputs (such as from the Central Asian region), it would come at an enormous economic cost, one that Britain is in no position to bear. Speculation includes the suggestion that the US might not sign a trade agreement with the UK unless it matches tariffs on Chinese goods. Similar conflict between the US and European Union, where a trade war looms, cannot be allowed to lead to a so-called “decoupling”.

The arguments in favour of it are thin, especially compared to a more gradual shifting of supply chains. The economic fallout would be massive. Shortages and high costs could set off another cycle of cost-push inflation while it could leave the West without the minerals it needs to supply its own armed forces, let alone those of allies in Israel and Ukraine.⁸¹ Securing a new supply must be a defence priority. But even beyond that, the idea that it would do more damage to China than a gradual shift, or that that is something the West should want, is not true. China is way ahead of the US when it comes to developing its own autarkic supply chains, from its own food to its own microchip industry.⁸² It has also been building up both its military and its munitions stockpiles at the same time as the United States has been depleting its own supply in support of Israel and Ukraine. Seeing the fate of Russian assets seized during the Ukraine War, China has been buying assets in currencies pegged to the dollar, but which have no risk of being seized.⁸³ A similar logic applies to China’s record-breaking purchases of gold,⁸⁴ mostly imported from the UK.⁸⁵

⁷⁹ David Uren, “How Australia withstood China’s campaign of economic warfare”, *The Strategist*, 7 February 2023, <https://www.aspistrategist.org.au/how-australia-withstood-chinas-campaign-of-economic-warfare/>.

⁸⁰ Ben Marlow and Melissa Lawford, “How China is fortifying its economy for war with the West”, *The Telegraph*, 12 May 2024, <https://www.telegraph.co.uk/business/2024/05/12/china-fortifying-economy-war-with-west/>.

⁸¹ Sydney Hudson and Wilson Beaver, “Securing Critical Mineral Supply Chains Is a Defense Priority”, *The Heritage Foundation*, 18 December 2024, <https://www.heritage.org/defense/report/securing-critical-mineral-supply-chains-defense-priority>.

⁸² Marlow and Lawford, “How China is fortifying its economy for war with the West”.

⁸³ *Ibid.*

⁸⁴ Melissa Lawford, “China’s \$170bn gold rush triggers Taiwan invasion fears”, *The Telegraph*, 30 April 2024, <https://www.telegraph.co.uk/business/2024/04/30/china-launches-gold-buying-spree-amid-fears-o/>.

⁸⁵ Jan Nieuwenhuijs, “PBoC Gold Conduit Revealed – Chinese Central Bank Did Not Stop Buying Gold in May”, *The Gold Observer*, 31 July 2024, <https://www.thegoldobserver.com/p/pboc-gold-conduit-revealedchinese>.

As well as preparing its economy for a hot or cold war over Taiwan, these moves also wrest control over the gold markets and see as diversified Chinese asset holding across the world. The Saudi-Chinese deal is perhaps the most emblematic.⁸⁶ A longstanding US ally taking \$16.2bn of Chinese money aligns them with their interests and actively rolls back the influence of the US and the US dollar. Currency swaps and the trade in Saudi oil moving in the direction of the renminbi means, again, that Beijing can capture more influence over key strategic goods. For instance, Russia already accepts renminbi for its oil exports.⁸⁷

These moves demonstrate that not only does China understand how to make itself more resilient in case of war with the United States, but it also knows how to project its economic power and to usurp economic influence from the US. The same influence that the United States once wielded to promote democracy and pry open markets is now being won by the Chinese Communist Party.⁸⁹ The UK must factor China's offensive economic strategy into its broader strategic calculus. Under the securitisation paradigm, Chinese economic warfare – and the consequences of economic fallout between China and the US – should be reframed as a major strategic threat against Britain. The instability currently unfolding underscores Britain's vulnerability as a passive actor. Although its relative minor status in the global economy restricts its strategic mobility, counteractions – especially against direct Chinese offensive policies – are available.

Some recommended include:

- **Economic Unconventional Warfare (UW):** The US, Australia and Britain should adopt unconventional warfare strategies of their own, adapted to economic domains. This includes leveraging private capital, sanctions and counterinvestments in sustainable infrastructure projects to challenge China's influence via development banks including the International Development Finance Corporation (DFC).
- **Countering Debt Traps and Domination:** Focus on undermining China's debt-trap diplomacy and economic domination by addressing local grievances and promoting quality, sustainable development. This will also promote re-engagement with international institutions.
- **Coordination and ISR:** Enhance collaboration between governments and private sectors while incorporating intelligence, surveillance and reconnaissance (ISR) to strategically counter China's tactics. This is no alternative to the full development of a forward-looking strategy to impose sustained economic costs on China and prevent it from dominating the international order in the way it so clearly seeks to.

⁸⁶ Melissa Lawford, "How Xi Jinping is challenging dollar dominance with landmark Saudi deal", *The Telegraph*, 24 December 2023, <https://www.telegraph.co.uk/business/2023/12/24/xi-jinping-china-dollar-dominance-saudi-arabia-deal/>.

⁸⁷ Ibid.

⁸⁸ William Sandlund, "China's international use of renminbi surges to record highs", *Financial Times*, 29 August 2024, <https://www.ft.com/content/ae08b6ed-d323-4a95-a687-0172a98857f4>.

Conclusions

Through the lens of securitisation theory, we can see how a breadth of security issues fail to be recognised as such and why the Government continues with policies that weaken our ability to influence the world and protect ourselves and our interests. Improvements to economic and civilian infrastructure, including commercial applications of cyber security and energy generation, are essential to counter this influence. These efforts need to be fully integrated into security policy under the new paradigm of securitisation doctrine. They are also the same advances and expertise in key high-growth and high-value industries of the future that afford disproportionate diplomatic influence with third nations.

The world is at a juncture with the US withdrawing from international institutions and pursuing great power politics outside the supervision of the international institutions that it created. This reset is likely to persist long after Trump has left the White House. If Britain gets the growth decisions wrong, we will soon have to face the informal end of the UK-US special relationship and become only a regional partner. The UK's ability to fund defence innovation and project global power is diminishing, leaving Britain isolated in an era of growing geopolitical threats.

Security is not just what threatens our survival militarily as previously believed. We need a frank and open discussion about the other factors that undermine our ability to govern independently.

To remedy these shortfalls, it is imperative to incorporate all these elements affecting our security into a new strategic matrix encompassing migratory, environmental, diplomatic and economic considerations. We cannot fight the last war, still less rely on the theories and policies of yesteryear. This report has suggested ways in which the current threat can be countered. But more important than that has provided a new framework by which the insights of securitisation can be leveraged and used to ensure our foreign policy is able.

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