ISAIAH BERLIN LECTURE
"BRITAIN IN THE NEW WORLD DISORDER"
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It's rather a daunting task to give this lecture, because Isaiah Berlin was the model of a 20th century public intellectual: brilliant, worldly, inquiring, humble, charismatic, determined. Berlin's scale was epic. He sought a social function for theory, for philosophy, for ideas, in order, he said, to "assist men to understand themselves and thus operate in the open, and not wildly, in the dark". His moral realism was courageous yet unsentimental. And don't we need that today?

Berlin was born in Riga in 1909, but soon his family fled, first to St Petersburg and then to London. His early life was therefore shaped by both revolution and war, the two critical drivers of disorder in the first half of the 20th century.

For the second half of his life, based in Oxford, the background music was more tranquil. It was provided by the emergence of "the West" as a coherent and eventually victorious force that prevailed in the Cold War and defined international relations at the end of the 20th century.

These halves of Berlin's life were separated by his diplomatic posting to New York in 1940 on behalf of the British government. He arrived two months before Roosevelt's re-election. The war seemed to many Americans far away, and the idea of the West was not yet concrete. Roosevelt was in deadly combat with the first incarnation of the "America First" movement. It took Pearl Harbor at the end of 1941 to prompt a decisive turn.

Tonight I am going to reflect on the themes of global disorder and the fate of the West not as they affected Berlin but as they affect us. Here is what strikes me.

In Berlin's lifetime it was the unity of the political West that saved the world from disorder and disaster, first from fascism and then from communism. Britain was central both to the definition of the West and the fight against disaster. Today, however, it's the other way round. Disorder in the world, and there is a lot of it, is exacerbated by the disunity of the West. Again Britain is affected by both. And although our agency is more limited, the way we play our cards will significantly affect our future.

Berlin would have told us that there are not historical inevitabilities; that decline is not a destiny; that the future is a contest over values and interests that we have to identify and defend.

Here is my take:

First, there is an extraordinary level of global disorder today, and reaction to it. But I don't think the world is headed for "de-globalization". Instead the combination of burgeoning global risks, fragmenting global politics, and the global digital revolution, are creating a more anarchic form of "might makes right" globalization. No one country is in charge; the world is "multi-aligned".

Second, the old "West" is not coming back. One key reason is that the old America is not coming back. The Trump Administration is in part a symptom of the way the world has changed. However, it also needs to be recognized for its genuinely revolutionary character. It is a key driver both of division within the West and the new global disorder. Keir Starmer said after tariffs were imposed in April that "the world as we knew it has gone". I think he was and is right.

Third, for countries like ours, the challenge is not to build a single new world order, but instead to contribute to what the historian Adam Tooze calls "world ordering".

This means multiple "coalitions of the willing" that push back against impunity. For Britain, our interests are aligned with the rest of Europe but our cooperation is sabotaged by Brexit. We need to address that. But we also need to engage with the world beyond Europe, including in the UN Security Council, where I think our privileged position will come under siege unless we are a voice for reform of the UN system.

Before launching into the present, there is a small connection to the last days of Berlin's life, at once personal and vicarious, that I want to mention.

In October 1997, Prospect Magazine published an interview with Isaiah Berlin. It was actually an extract from an interview done five years earlier, though I did not realize it at the time. Among other things Berlin argued that the victory of the West in the Cold War meant the end of the politics of the Left.

I was Head of Policy at Downing Street at the time. The spirit was very much "glad confident morning". So I drafted a letter for the Prime Minister to write to Sir Isaiah Berlin. The letter suggested that in fact the end of the Soviet model was a liberation for the Left, allowing its values to flourish without the taint of Soviet communism.

Tony Blair believed, strongly, that the battle of ideas mattered a lot, more than people realized, in politics. He was in his strong communitarian phase (with the hyphen in social-ism important). He was enthusiastic to meet Berlin, and asked in his letter to do so.

I was told this week that this was the last letter Berlin received. He read it, but sadly died before replying to it, still less having the proposed meeting.

For our purposes tonight, the striking thing is not Berlin's comments about what the end of the Cold War meant for the Left, which Tony questioned in his letter. Instead it is the paradox, which has become clearer and clearer since Berlin's death, that victory in the Cold War seems to be a victory from which the West, rather than the Left, never recovers. That is what we are living with today, and that is what I will explore tonight.

The new phase of "chaotic globalization"

What will historians record about 2025?

It won't all be bad. Hopefully Arsenal will win the league. Nuclear fusion has achieved a significant breakthrough. China has installed 250 Gigawatts of solar power in the first half of the year alone – twice as much as the rest of the world combined. There is a Gaza ceasefire of sorts. US capital investment in AI has already reached a staggering $500bn.

But in a world with more resources to do more good than at any time in human history, the landscape is charred with damage.

There are 60 active conflicts. The World Bank has revised up the number of people living in extreme poverty to 830m. The Varieties of Democracy project says that for the first time in twenty years there are more autocracies than democracies. The UNHCR says there are 125 million refugees and internally displaced people. There are 2 famines so far recorded, and six countries with the highest levels of food insecurity. Carbon emissions have breached last year's record, with the target of limiting the rise in average global temperature to 1.5 degrees above the historic average torched.

And alongside damage there is danger. Climate change, AI, pandemics, the nuclear arms race all run the risk of crossing tipping points. The "runaway world" that Tony Giddens feared in his 1999 Reith Lectures has come closer.

How did this happen? Especially how did this happen when thirty years ago, at the end of the Cold War, democracy was on the march, notably in Latin America and Africa; regulated markets and free trade were dominant; the Kyoto Protocol was signed; multilateral institutions were growing in importance; human rights gained ground after the disasters of Rwanda and former Yugoslavia.

Undoubtedly policy mistakes at home and abroad spurred inequality, instability and loss of confidence. But my thesis is that the changes that have ruptured the global order are more structural. They fall into three categories, any of which would be challenging in their own right, but which when combined exacerbate each other in ways that create today's "polycrisis".

First, as a consequence of a more connected world, global risks have risen exponentially, and far outstripped the ability of global institutions to manage them.

The Covid pandemic provides a telling example. The climate crisis even more so. The imbalances of the global economy are further evidence. The refugee crisis too. In each case international cooperation is too weak to meet the challenges. Bloat and power in international institutions have been blamed. I argue it is weakness not strength that has been exposed.

While globalization is not new, a hyper-connected world is. And it has emerged without anyone in charge. This is the second big change.

Chinese economic growth is well known. India has transformed itself into an economic powerhouse. The 10 BRICS countries now account for one third of global GDP and 50 per cent of the global population. Countries like UAE, Turkey and Indonesia have achieved quantum shift in their economic development, and are putting their power to geopolitical use.

Interestingly, America's share of global GDP has not changed. In 1990 it accounted for 25 per cent of global GDP, and it continues to do so today. But the rest of the G7 group of leasing industrialized democracies has seen its share of global fall from 42 per cent to 18 per cent.

Political power has moved with this shift. It's not as simple as "East rising, West falling", but that is part of it.

Here, Berlin was prophetic. He argued that there is no single vision that can encompass all human projects. The divergent forms of modernisation show pluralism in action, with multiple routes to prosperity and power.

Sometimes this is called a multipolar world. Secretary Rubio calls it this.

But that suggests a degree of balance. I don't see that. What I see is something much more fluid and transactional, a world of multiple alignments from issue to issue not fixed blocs. It is what in 2006 the Indian diplomat and now opposition politician Shashi Tharoor called a "multi aligned world".

I see this in my work every day. Go to any conflict zone, which in the vast majority are internal civil wars, and you find the competing parties are backed from outside. In Sudan, the largest humanitarian crisis ever, over a dozen countries are directly involved, including all ten neighbors.

This is not a "leaderless world". It is a world of many leaders. And it suffers the feature known as the "Kindleberger Trap": a power vacuum where critical global public goods – like open markets and security - are not provided.

The first two changes are being accelerated by a third - the technological revolution. The shift from an industrial age to a digital age has ripped up the social, economic and political contract.

For all the debate about the impact of trade on manufacturing jobs in the industrialized world, it is clear that at an aggregate level technological change has been a far bigger contributor to de-industrialization. Meanwhile, the stand off between the US and China over semi conductors and rare earth minerals shows how geo-economics and geo-politics intersect. And there is massive knock on from the tech shock to domestic politics.

In the US the fusion of tech power and political power was on display at this January's inauguration. But the impact of the digital revolution on politics is bigger than the replacement of one group of industrial tycoons with a group of tech bros.

The Italian writer Giovanni di Empoli has written a book, The Hour of the Predator, which covers the way technology has transformed politics. He draws a striking metaphor: "The fate of our democracies is being played out increasingly in a sort of digital Somalia, a bankrupt state the size of the planet, at the mercy of the overlords of online warfare and their militias".

The challenge for open societies is fundamental. When people feel that the genie of disorder is out of the bottle, I think they are right. And hunkering down is not going to reverse the process, because capital flows, refugee flows, even trade flows, are rising not falling, and technological change accelerating.

We need to look for stabilizing buoys in this stormy sea. This brings us to the question of "the West".

What has happened to the West?

From its origins in Enlightenment thinking about human agency, reason and progress, the political idea of "the West" after WW2 was defined in what former German Foreign Minister Joschka Fischer called its "birth certificate": the Atlantic Charter signed by Churchill and Roosevelt in Newfoundland in December 1941.

Its central tenets were that the post-war order should be defined by key ideas that learned the lessons of the period after World War 1, above all that nations should be able to define their own futures and not be subjugated by the powerful (a bitter pill for Churchill given his pride in the British Empire), that trade should be open and free not coerced, that human rights should be meaningful and equal, and that the rule of law not the rule of the jungle should govern international affairs.

The ideas of the Atlantic Charter found rhetorical force in President Truman's comment at the San Francisco conference, founding the UN, in 1945, that "We must, once and for all, prove by our acts conclusively, that Right Has Might". They found legal expression in the UN Charter and the bevy of international agreements signed after 1945.

Together these agreements were "liberal" in the sense that they put the rights of people not just states in international law for the first time; they were "international" in the sense that they were signed by all countries; and they constituted an "order" because of the institutions established to forge compromise to achieve their implementation. Hence the phrase "liberal international order".

By the end of the Cold War in 1990, these ideas seemed hegemonic. The insightful Bulgarian political scientist Ivan Krastev has said that the western model, liberal democracy at home and free markets abroad, was "presumptively canonical".

Not any more. It is not just that President Xi of China claims that we are living through the inevitable victory of the East over the West. Nor do we need to take as fact lectures from President Putin that liberalism is "obsolete".

More important, the facts show that democracy is in retreat; mercantilism is on the rise; multilateral institutions are weak and weakening; 'globalist' is an epithet in countries that shaped and benefited from globalization.

And we have to notice that the Vice President of the United States, echoed by many on the right, says that "there is something about Western liberalism that seems almost suicidal or at least socially parasitic".

This is where the revolutionary character of the Trump Administration comes in. I don't agree with those who say that the Administration has no ideology. Nor do I think that the divisions that exist within the coalition that elected President Trump are necessarily fatal to its prospects.

It begins, as President Trump put it in Warsaw in 2017, "with our minds, our wills, and our souls". The challenge is to the core idea of the West: far from lauding the checks and balances of liberal democracy, the commitments to minority rights and human rights, the promotion of regulated trade, the belief in multilateral international organization, these are said to be the root of the decline of the West. It is actually Putin's argument as well.

Where China and Russia are "anti West", and India and Brazil are "non West" actors, the movement led by President Trump and his allies is seeking to redefine the West from within.

It exalts singular power as a replacement for the pluralism that Berlin lauded as the essence of liberty and the western idea. It promotes soil and roots in place of credo, heritage in place of ideals, in defining a nation. It values national sovereignty in place of international cooperation. It embraces majority fiat and executive rule in place of minority rights and deliberative democracy. It is far more concerned with internal politics in Germany and the UK than Russia or China.

On foreign policy, it is wrong in my view to call the Administration's version of America First "isolationist", though there is a strand of that opinion present. But it is certainly unilateralist, embraces bilateralism, and is deeply suspicious of multilateralism.

Celia Belin of the European Council on Foreign Relations has said that "President Trump's foreign policy has a clear through line: it is his domestic agenda exported". Europe is seen in some quarters as an extension of MAGA's political opponents at home.

Once again, Berlin said it first. He argued: nationalism "transforms inward moral conflicts into external enemies".

These enemies can be seen in divisions within the liberal democratic world on Russia, climate, global health, Greenland, international development, international law, international institutions, nuclear testing. On these issues the West is riven. We are actually divided on Gaza too. And watch out on China.

I was in Beijing in October. There are serious dangers in a confrontation between the US and China. But Europeans also need to watch out for the dangers if China and America come to agreement. As an excellent paper from the Robert Schuman Center in Brussels put it, there is a "pincer", with the US an increasingly "extractive superpower" (a concept also used by former MPC member Adam Posen) and China a "dependency superpower".

The AI revolution should only increase our European fear of being squeezed. The US on its own constitutes 75 per cent of AI capital expenditure; Chinese investment takes the figure to 85 per cent. The leverage this creates is enormous.

This all leaves Britain facing double jeopardy – domestic and international.

Britain in a world of disorder

There is our own domestic jeopardy. Austerity was impoverishing, Brexit weakening, Covid battering, and Russia's invasion of Ukraine has made a shift in foreign policy towards Asia seem naïve. Today we are £16 000 per year per person poorer than we would have been if we had sustained pre 2008 levels of economic growth.

The primary task is one of domestic revitalization and resilience. And there is a lot to build on, from science to finance to universities to great business and sports to creative industries and the law. I don't think we should be despondent.

But what we do abroad affects us at home. And our international position has been weakened.

We are out of the EU, America is tough and transactional, the UN system in which we have a privileged position is in retreat. We don't have the finance of Saudi Arabia, the European links of Germany, the demography of Indonesia or India, or the regional sway of Turkey.

It seems to me we need to answer three questions as we come to terms with the new global disorder I have described tonight.

"The first is: "Can the Western alliance be remade in its old image?".

My answer to that is no.

A revised Atlantic Charter was issued by President Biden and Prime Minister Sunak in 2022 but I would be surprised if ten people in this audience remember that.

That particular effort can be dismissed. But the fundamentals are stacked against a world of blocs: there are too many big and medium sized players, too many issues, too many rivals.

Berlin would have called this the price of pluralism – the world's inescapable multitude of purposes.

What's more, America is not going to play the role of benevolent hegemon again. The experience of the first half of the 20th century in which generations of Americans fought in Europe, forged common bonds, and learnt the lessons of history, is not going to be repeated.

We need to think about what Michael Froman, President of the US Council on Foreign Relations, calls "coalitions of the like-minded, which together would constitute a network of open plurilateral relationships".

This is a callout to countries like Britain to be agile and entrepreneurial in defense of their values and interests. As Adam Tooze writes: "It is a moment of discretionary choices of disruption… This is not a moment for soothing bedtime stories, but to summon our wits to survive".

He recommends, and I think he is right, that we need to be in the business of tangible results through a focus on multiple networks of action. He points to the Chinese approach in multiple fora: "What it does constitute is a policy of connection"

The second question is: "Does that mean we stand for nothing, have no fixed values or orientation, to the world around us, and are just reduced to what we can leverage?"

My answer to that is also no.

I believe that the central challenge facing the world today goes to the heart of the idea of the West: it is the challenge of impunity, the exercise of power without accountability.

This goes to the heart of Berlin's work. He argued that politics was the art of preventing cruelty not achieving perfection. He taught that liberty is not secure when power is unchecked. Because human values are plural and in tension, so political institutions that represent multiple viewpoints and counteract arbitrary power are a strength not a weakness. The fact that they make the exercise of power cumbersome is exactly the point.

Wherever you look today, from the invasion of Ukraine to the power of big tech to abuse meted out to civilians in war zones, the abuse of power by those with power is growing. That is why I talk about an Age of Impunity and chair the Advisory Board of the Atlas of Impunity.

The battle against impunity puts Britain on the right side of the biggest and most difficult political arguments in foreign policy – from the defence of international law in Ukraine and the Middle East to support for human rights around the globe to North/South cooperation on climate change to defence of our own interests in international trade.

We are a medium sized country that relies on rules, playing by them not just incanting them, to sustain our interests. But for that we need alliances.

Berlin's biographer, Michael Ignatieff, wrote recently: "Berlin's view that history was never necessarily on liberalism's side is not a counsel of despair. It should renew democratic determination. It forces us to realize that it will be up to the embattled fortresses of liberal democracy, and the conviction of their peoples, if liberty is to prevail".

Remember the phrase "embattled fortresses".

The third question is "who do we stand with?".

On this the Starmer Administration has shown the right instincts. It wants to get closer to Europe; stays strong on Ukraine; is trying to keep in check the economic threats from the US while sustaining intelligence and security relationships, which are vital; is forging a trade agreement with India; joining the CPTPP (Comprehensive and Progressive Agreement

for Trans-Pacific Partnership); and reaching out to ASEAN (Association of South East Asian Nations).

The issue is one of policy dosage and impact. In crude terms, will these moves make an impact in this Parliament.

For example I gather the trade agreement with Europe is worth £9bn by 2040. But we are already a 3 trillion pound economy. A £9bn improvement will be lost in the fiscal roundings.

The European agenda for Britain goes wider than the EU, not least because the EU needs to work with non-members like the UK, Norway, Switzerland, Ukraine and Turkey on security and economic matters. New institutional arrangements are going to come into play on different issues. But I am going to focus here on the UK's relations with the EU.

The government has agreed an agenda. The focus is on veterinary standards, energy, and youth mobility, with defence on a separate track. But the negotiating path is tricky, and if we know anything from EU negotiations it is that they are draining of energy and goodwill unless they are given political momentum.

Meanwhile the damage of Brexit mounts. We are suffering a punishing Brexit tax every day.

For example, the picture on goods trade should be getting far more attention. The combined value of imports and exports as a share of GDP grew from 30 per cent in 1975 to 67 per cent last year. But we are suffering what Anton Spisak of the Center for European Reform calls "the most severe trade stagnation in a generation".

Until 2008, trade volumes grew at around 5 per cent per year. Then growth fell to 2 per cent per year. But since 2020, on the back of Brexit and the pandemic, trade volumes have been flat in real terms. And the fall in goods exports has been draining 1 percentage point from GDP each year.

By the end of 2024, goods exports were 20 per cent below their 2019 levels. As Anton Spisak says, this constitutes a structural problem. And that is before the Trump tariffs kick in.

Credible estimates put the cost of being outside the Customs Union at half to one per cent of GDP, so of the order of £15-30bn a year. The government ruled out joining the Customs Union in its manifesto. But a commitment to regulatory alignment for manufactured goods has been estimated by Frontier Economics to be worth 1-1.5 per cent of GDP. Product testing, labelling, conformity assessment barriers would be removed. And that was not ruled out in the manifesto. We simply cannot afford to stand still on these matters.

Of course, further progress needs the EU to cooperate. The recent agreement with Switzerland shows the EU is open to bespoke arrangements, short of full single market membership, but there is a complicated Swiss ratification process that the EU will be determined not to compromise. The British interest it seems to me is to put more cards on the table to create political momentum.

There are obvious examples if we are willing to look for them. For example, to mitigate the fiscal pain of increased defense spending, the UK should be all in on the idea of the proposed E800m European Defense Mechanism, which would issue long dated bonds to pay for increased defence spending.

A number of proposals are circulating, and sit in parallel to the 150 billion Euro procurement initiative of which the UK is already slated to be a part, but whose extended negotiations are also threatening our participation in the first wave of procurement.

The EDM would be intergovernmental, and be open to non EU members like the UK and Norway (and Ukraine). It would not be vulnerable to vetoes by countries like Hungary. Its structure as a rearmament bank would allow debt to stay off national balance sheets at least until equipment is purchased.

The danger is that this proposal, which would mutualize the costs of Europe's increase in defence spending, gets stuck in the "too difficult" box. In fact, given the security and fiscal positions of countries across Europe, it should be in the "essential" box.

Another policy that would be symbolic as well as meaningful is in my own area of work, namely humanitarian aid. Until recently the UK was a major player. Now the EU is the biggest player in the world. We should be offering to merge part of our overseas aid budgets so that we maximize the impact.

Migration is its own European issue and deserves its own lecture, distinguishing immigration from asylum, addressing integration not just entry, and national from international responsibility. When we were members of the EU we had the right to deport people who arrived in a small boat from France back to the country in which they first touched European soil. I run a humanitarian organization and have argued throughout my time at IRC that orderly, fair and speedy migration rules and decisions are in the interests of refugees as well as host populations. A sustainable solution needs European cooperation.

As for the AI revolution, we need to plot a clear course to being an 'AI maker' and not just an 'AI taker'. Our scientific, research and technological backbone are real strengths. But AI is a scale industry - scale in capital, scale in data and scale in end-user markets. In Europe, including the UK, we have these, but to make the most of them will take joint work that recognizes the risk in hanging back as well as the risk of change.

We are ahead of the EU in facets of the race, but we share a need to build European capability if we are not to be vulnerable clients of the two emerging AI superpowers.

It is also worth noting that when it comes to the economic security issue of rare earth minerals, which are critical in defence and energy, and which the Chinese have been working on for thirty years, there is a massive EU-UK shared interest in cooperation. The EU approach is more ambitious and more muscular, with quantified benchmarks for de-risking, directly applicable regulations and product-specific compliance duties. The danger for the UK is being left behind, as with the now-scrapped rare-earth refinery in Hull.

This is all to say that Europe is our Continent, that our alignment of interests with EU members and those European countries outside the EU is strong, and that the time for fresh and unconstrained thinking is now.

The multi aligned world means that we need alliances beyond Europe as well as not instead of alliances in Europe. That leaves a wide range of options for international cooperation, and I want to say a word about our position in the UN system.

The rules drawn up in the founding of the UN are basic not vainglorious. Civilians should not be targeted in war. Refugees should not be sent back to persecution. The problem is not their grandiosity. It is that they are not implemented.

The UN is only as strong as the member states make it. For Britain it is in our interests that it is stronger not weaker. And equally important, our privileged position will not be sustainable unless we show ourselves to be reformers.

The Prime Minister on his visit to India restated the longstanding UK position that India should become a member of the Security Council. Good. But it is a very long shot. And more veto-wielding countries are hardly going to make the UN work more efficiently. Here are the kind of ideas that are tests of whether we are serious about reform, and about new coalitions for global progress.

Consistent with tackling impunity, we should support the suspension of the veto in the UNSC in cases of mass atrocity. France has already proposed this. 120 countries support it. The humanitarian nightmares in Syria, Gaza and Ukraine, all blighted by Russian and American use of the veto, have contributed to the castration of the Council as the pre eminent problem-solving forum on matters of war and peace.

Consistent with a determination to build appropriate independence in international institutions, we should support the idea that the UN Secretary General should be a one term, seven year appointment. We should also support the call that the Security Council present two names, not just one, to the General Assembly for the choice of the next Secretary General. This is now urgent with less than a year til the nomination of a new SG.

And consistent with a commitment to get the best people into the right jobs, we should kill off the convention that certain jobs are reserved for certain countries. The UK-nominated Emergency Response Coordinator Tom Fletcher is doing an outstanding job, but we need a system where all appointments are merit-based.

None of these are a silver bullet. But all of them share the feature of recognizing that the world order is being rebalanced, and that impunity needs countervailing power to be checked.

Conclusion

The argument of this lecture has been that far from globalization going away, globalization is going to crowd in on us. This was true of Isaiah Berlin's life and it is true today. We need to take inspiration from his imagination and his ideas.

- Berlin's commitment to pluralism was not the abandonment of principles, but the making of them.

- He rejected the false choice between negative and positive liberty; flourishing societies offer their citizens freedom from oppression and support to enjoy that freedom. As he said: "Negative liberty is twisted when I am told that liberty must be equal for the tiger and for the sheep, and that this cannot be avoided even if it enables the former to eat the latter."

- And he rejected the false choice of being either rooted or cosmopolitan, of being from somewhere or everywhere, because he was clearly British but also worldly. As he said: "I am a Jew in England, a Russian in Berlin, a liberal among ideologues."

Nearly 80 years ago George Kennan ended his famous Long Telegram from Moscow by saying the greatest danger is that we allow ourselves to become like those with whom we are competing. Today the task is not to seek to restore lost dominance, but instead to recover the moral clarity and political vision of who we are and what we stand for.

As liberal societies and their politicians are tempted down a path that rejects pluralism, harasses opponents, demonizes refugees, declares emergencies, suborns the media, instrumentalises the judicial system, all features of the Soviet system that the Cold War was fought to defeat, this is surely the ultimate role reversal in the world today, one that Berlin would have fought with courage and conviction, and one that we need to fight and win at all costs.