



# The Perch Pod Episode 24

## Tom Macleod [Sky News]

### Scotland

Jacob Shapiro:

You're listening to the Perch Pod from Perch Perspectives. Hello listeners and welcome to another episode of the Perch Pod. As usual, I'm your host, I'm Jacob Shapiro and I'm also the Founder and Chief Strategist of Perch Perspectives, which is a human-centric business and political consulting firm. As a reminder before we dive in, you can email us at [info@perchperspectives.com](mailto:info@perchperspectives.com) if you have any thoughts about the podcast, if you want to recommend us a book to read or more importantly, if you want to talk to us about the services that Perch Perspectives provides to help investors and companies and policy makers with the analysis and information they need to make more informed, more empowered decisions in the international global environment.

Jacob Shapiro:

Joining us today is Tom Macleod. Tom is an anchor and journalist for the international news channel, Sky News and has also worked for the BBC World Service. He holds a master's in geopolitics from the University of Sussex and he's covered some of the world's biggest breaking stories and has a particular interest in international affairs and Scotland's future in the global arena. In that sense, Tom and I share something in common and we've been chatting for a couple of years now trying to figure out something to do together. And we finally got a chance to talk in this podcast and I'm really happy with how this turned out. I think the issue of Scotland's future is one of the most interesting geopolitical, political policy questions in the world right now and it's going to be a really interesting and complicated issue going forward.

Jacob Shapiro:

It's also a matter of some personal interest for me because most of you probably know I'm Jewish with the last name Shapiro, but my mom's side of the family is all Scottish. They all hail from the Clan Munro. So I've always had a particular interest in Scotland and have been thinking about what Scottish foreign policy might look like in the case of Scottish independence for years now. And as I've thought about it and research that I really think there is a dearth of honest and objective commentary about what that actually looks like getting away from the politics of it, whether you're pro-independence or not, that's not what Tom and I really get into here. It's more about what's happening, why is it happening, what are the motivations, how



does this work and what are strategic considerations that folks are missing when they're thinking about this issue in part because they're blinded by ideology.

Jacob Shapiro:

So thanks so much to Tom for coming on and lending his perspective and insights to this conversation. I thought it was a great one and hopefully, we'll have him on again soon. Otherwise, take care of each other, be good to each other, wear your masks. We will see you out there. Cheers. It's actually been a pretty big week, I think in terms of Scottish independence and the SNP, the Scottish National Party had that 11-point roadmap that got published last week. And for some reason, Boris Johnson thinks traipsing around Scotland and telling them that their independence desires are irrelevant is going to help keep the union together. I don't really understand what's going on in his mind. But from your perspective sitting there in Scotland, has it been a big week or stuff just generally the same?

Tom Macleod:

I think feels like it's been quite great year to be honest with you. I mean, the future of Scotland, the independence debate since 2014, it hasn't gone away. But certainly, since the Brexit vote back in 2016 and now that we've had the transition period for Brexit. We've signed this trade agreements with the European Union that has now gone into force on the 1st of January. That has all sort of put Scottish independence back to the forefront of a lot of people's minds and particularly with regards to current or upcoming elections because there's going to be Scottish Parliamentary elections this May.

Tom Macleod:

And you're right, that roadmap was published. The SNP had their party conference towards the end of last year. And not only Brexit, you've got the context of the pandemic feeding into all this as well. And like you said, Boris Johnson's visit up here this week has caused a huge amount of controversy. Should he have been traveling when there are travel restrictions in place in Scotland? That's been a big debate. But just generally, the handling of the pandemic has been a major issue that has fed into the debate around Scottish independence ahead of an election.

Jacob Shapiro:

I generally don't like to treat politicians as incompetent or crazy because usually that means that I'm just not understanding what they're doing, but I have to ask with Johnson. It seems to me what he's doing this week and in general the way he's behaving towards Scotland just plays right into Sturgeon's hands. I'm sure he doesn't want to be the prime minister under whose watch Scotland really the independence sentiment really rises. But what he's doing, I don't understand how what he's doing gets him to a more United Kingdom. Do you feel the same way or am I missing something?

Tom Macleod:



There's a really interesting sort of divergence on leadership compared to Scotland and Westminster because you've got the first minister, Nicola Sturgeon who has extremely high approval ratings through the pandemic, Boris Johnson, the exact opposite. I think Scott's recently gave Boris Johnson a 9% approval rating in terms of his handling of the pandemic. 74% of those people gave Nicola Sturgeon a positive approval rating. So there's a huge differential there. And the interesting thing about that as well is that let's not beat around the bush. The UK and that includes Scotland has done very badly in handling the pandemic. We passed 100,000 deaths this week. We have the highest death rate in the world, more than 16 people in every million dying every day of COVID. England on a numbers basis has been worse.

Tom Macleod:

The population is far bigger of course. But when you look at it per capita, it's done worse. But Scotland hasn't been brilliant. And there's also been a huge catastrophic failure in Scotland's care homes particularly. So the fact that the divergence in approval between the first minister in Scotland and the prime minister in Westminster is so vast is very interesting because it's not like Scotland has done in New Zealand and hasn't had any cases of COVID and hardly any deaths at all. There's a really interesting reason for that and I personally think it's communication. You need your leader to communicate well in a crisis. And I think it's widely perceived in Scotland and in other parts of the UK that the communication from Westminster has not been good enough and it's not been empathetic, which I as a news presenter, it really frustrates me the last few years.

Tom Macleod:

And it'll be the same in America I'm sure when you've that because you can't admit fault. They just can't say sorry and they can say I was wrong about that. And for whatever reason, whether it's fear of looking weak. But I felt in this last year, there's nothing wrong with a leader saying, "Apologize for that. We really got that wrong. And it gave me sleepless nights and I'm really sorry." Because I think that's what a lot of people have wanted to hear this last year. And Nicola Sturgeon has done more of that than Boris Johnson. But yeah, more broadly your point about him not being the right man to come and speak to the Scottish public. I'm sure people in his own party, the Conservative Party agree with that and they think the worst thing to do in terms of trying to get people back onsite to save the union is to send Boris Johnson to Scotland.

Jacob Shapiro:

Yeah. Well, I mean, you talked about sort of England and Scotland's record on COVID-19 sitting here in the United States. We are not in a position to judge anybody about their COVID-19 record based on how things have gone here. So-

Tom Macleod:

Yeah, absolutely, and I don't... whether you... He's not there anymore and it is a completely different situation in the States. But said one maybe you have the same



feeling about that communication between those in power and the public and a lack of humility.

Jacob Shapiro:

I think that's been true for... Yeah, I think that's true in general. But I think in the United States, it's not just a failure of communication on any one side. I think the communication on the pandemic has been difficult in part because there just wasn't a lot of knowledge about how things should go forward. So for instance, I mean, lockdowns are obviously effective, period. I don't want to hear from anybody who says that lockdowns aren't effective. But human nature is also chafes against being locked down continually. And the way that even folks like Dr. Fauci and folks that I respect a lot framed the initial COVID-19 breakout was okay, we have to lockdown really hard here. And once we lockdown for a period of time, we're going to flatten the curve and then everything is going to be okay. And that wasn't true and it wasn't true for two reasons.

Jacob Shapiro:

Number one, a significant number of people did not trust the government and I'm not sure that government being more humble would have made them trust it anymore. There are just these factional and political differences in the United States that have been building for years that prevented folks from trusting the government from that perspective. And then number two, I think there was a little bit of arrogance about, oh, if we flatten the curve, everything's going to be fine even though we really didn't understand what COVID-19 was and what the long-haul was going to be.

Jacob Shapiro:

And if you tell folks we're going to lockdown, but we're not going to give you the stimulus checks that you need, we're not going to have support, you're creating this dichotomy where they have to keep their businesses open to have some semblance of economic livelihood while at the same time telling them that if they're out and about doing stuff, they're Nazis or they're fascists because they're not doing what's supposed to be done. So I think the lack of humility there to me is actually a symptom of a broader breakdown in political discourse, in trust in society. And I think you're right that I mean, the US and the UK have similar chasms there for obviously very, very different reasons. But at least I think there is some similarity in the sense that trust between the people and the government has broken down on some level in both countries.

Tom Macleod:

What you said first there is that they're actually certainly at the start of the pandemic. I think the difference between the US and the UK is that the UK population, there was... The UK government had that trust at the start, but they did the same thing, flatten the curve, 12 weeks to turn the tide was one of Boris Johnson's quotes at the time. We'll give this a 12 weeks, 12 weeks of lockdown and measures and then we'll be out of it by the summer. And subsequently what's

happened, I think they've lost a large amount of that trust, whereas maybe in the United States like you said, if you never started with that level of trust, I think we did here, but it's quickly dissipated.

Jacob Shapiro:

Yeah, but I mean, the other part of that and this goes to a country like China's response or Vietnam's response to the pandemic is that lockdowns also only work if people actually do the locking down. And it just didn't happen in the United States. And there is and I wonder from a Scotsman perspective how this feels because both the United States, Scotland, England, they are all bastions of liberalism and our conception of individual rights comes from all these places. And there is something at odds between I have the right to do whatever I want and I am going to now restrict what I'm doing because as a society it is best for all of us to take these 12 weeks and not do anything. And just throughout the West, we have struggled with that. We haven't been able to find the right balance.

Tom Macleod:

Yeah, absolutely and I think parts of that like you said is the American sense, economic checks, stimulus checks directly to people. Back here in the UK, we've had schemes to pay people's wages. The state is effective. We've been paying a large amount of people's wages for the whole year, but there are still big gaps in that. Self-employed people, millions of them have not had any help. In terms of people who need support for food and free school meals here in the UK has been a big area of debate and those haven't been funded properly according to lots of people.

Tom Macleod:

So I think the interesting divergence between the UK and the US is... Again, I think polling has pretty much consistently showed in the UK that the public do support strict lockdown measures. That they have to be backed up with the support that only the state can provide for people to take those long-term measures seriously. The anti-maskers and the smaller number of anti-vaxxers can be vocal, but the majority of the British public consistently backs strict measures, which did surprise me originally and perhaps, the difference between the US and the UK there.

Tom Macleod:

But sort of looping back to where Scotland plays in this and where the leadership plays a role is that part of the reason I'm sure that Nicola Sturgeon's approval ratings certainly amongst Scottish people are so much higher than Boris Johnson is that she is perceived to have also handled the pandemic broadly much better and she has generally tended to unknown measures and then stricter measures ahead of Boris Johnson a few days here, a few weeks there ahead of whatever he then suggests, which has given the perception that she is more on top of it. And subsequently, people think that an independent Scotland would have handled the pandemic better with more powers given to them or the powers that independent state would have to deal with it.

Jacob Shapiro:

Yeah, no, I think that's exactly right. Going back to the roadmap that SNP announced, I feel like often folks who are skeptical of Scottish independence often come with a litany of legalistic arguments that the UK government is never going to let Scotland have a referendum, the EU is never going to welcome them in, all these sorts of things. And for me the most interesting thing about the roadmap was it tipped its cap at that sort of thing. It said, okay, here are the legal steps that Scotland is going to take going forward in order to secure independence.

Jacob Shapiro:

But it seemed to me that the real focus of the roadmap was to make it politically untenable for the UK government to not allow Scotland to have its referendum to sort of make it to embarrass or shame the UK government into giving the SNP this chance to hold a referendum. And I think that that really seems to me to be the crux of this issue because it's ultimately not a legal argument or a trade argument or anything else. I don't think folks think about sovereignty and patriotism and nationalism in terms of, oh, this is going to be great for trade policy. We will get a better tariff with Norway because we are part of the UK.

Jacob Shapiro:

It's a more visceral thing. It's either I believe in Scotland or I believe in the UK or whatever else. Am I right there? Do you feel like it's a more political visceral argument? And do you feel any kind of shift in Scotland in that direction? Or do you think that if the chips were down and they were faced with a referendum in front of them, they would be thinking more in terms of, oh, but what about the pound and what about the debt issues and the EU hasn't been exactly friendly to us, how do you balance those things?

Tom Macleod:

Yeah, it's a really interesting question. I think you're right on the... At a basic level, it's about feeling, it's about emotion and it's about appealing to those emotions and particularly, given the context of what's happened in the past few years. And you're right, that roadmap effectively SNP said if this decision was challenged legally by the UK government, we would fight it. And I think even the sort of the plan B is to try and have a referendum even if the UK government refuses to grant it. So it tells you it's what they want. It's the mandate that the SNP stand on every election. They've been in power for 13 years. Their raison d'être is an independent Scotland and they keep being voted back in.

Tom Macleod:

So yes, to me, it becomes untenable, even though there was a referendum in 2014 and the UK government said so once in a generation vote and they keep saying even to this day that that vote happened, the people of Scotland made their decision. But it becomes untenable if you have a party that keep being elected to a default parliament on a mandate of independence and they keep being returned and they're

possibly going to be returned with a majority in parliament in May. And for the response from Westminster to keep saying, "No, that's an untenable situation."

Tom Macleod:

But the way... You're right, the appeal at the moment and maybe this is the same for referendums in other countries and when talks talk of independence. For a long time, it probably is about emotion and it's about your place in the world and how you want to be governed. And it's about your place in the world and it's about being governed by your own parliament rather than being governed by one that's far away. And you as a country haven't voted for repeatedly because Scotland does not vote for the Conservative Party in big numbers. But I think when it comes to the crux, people still care about how are they going to pay their mortgage, how they're going to pay their bills, what is that the economic situation going to be.

Tom Macleod:

So while they might not be particularly fussed about the trade negotiations and things that would come with Scotland being an independent country, the economic argument I think will still be the one used if there is a referendum that's legislated for in the next few years, that's the argument that will be used by the UK government. And I think that can be quite powerful because the one thing that the SNP have yet to outline really clearly is what they would do with regards to currency and the economy. And the plan back in 2014 I think was to keep the pound. But the critics of that particular argument say that that effective of use the Bank of England controlling monetary policy for an independent Scotland.

Tom Macleod:

So you wouldn't have the powers that your own bank would have and that includes interventions, big interventions, big state interventions like a further scheme during a pandemic. So you're right at the moment. And for a lot of people, it's an emotional argument and it's about being self-governing. And Brexit has created this division in the way we want our country to be and the kind of country we all want to be. And there's that big cleavage between Scotland and England in that regard. But if there was to be another vote, I think there's still for quite a lot of people questions to be answered over currency and the economy because the money in your pocket is important.

Jacob Shapiro:

Yeah, and I want to pick up on that a little bit. But before we leave sort of the internal politics of Scotland, I wanted to ask even within the SNP are there factions with the SNP that don't agree with each other? Scotland is sort of historically a famous for its internal divisiveness I guess, I would call it and sort of the pragmatic nature of shifting alliances within Scotland political structure. Do you feel like the SNP if they were able to secure that majority would all be pushing forward in the same direction or would factions within the SNP, maybe folks who are anti-Sturgeon or folks who are thinking back to 2011, is that there or do you think that the SNP itself really does



have enough unity so that if they were able to gain that absolute majority they would be able to push their agenda forward?

Tom Macleod:

I think the one thing that everyone in the SNP does agree on is independence is the goal, but when and how you get there I think there is definitely split opinion on that. There are some people would just perhaps why it was alluded to in the route map that was published they would like Scotland just to hold a referendum much in the same way as Catalonia did. No permission needed, we hold it and you stop us to the Westminster government. There are obviously another faction who think that that is not the road to go down and it has to be sanctioned by the UK government and due process must be done. There are also, as you said, divisions and they are at the moment coming to the fore between pro Nicola Sturgeon parts of SNP and pro Alex Salmond, the former prime minister and parts of the SNP.

Tom Macleod:

There is argument ongoing at the moment after Alex Salmond was investigated for accusations of sexual assault and then cleared last year. There are still questions to be answered about how that particular complaint about his behavior, which was dismissed was handled within the SNP. And I think Mr. Salmond is appearing as an inquiry next week, sorry, in February. He'll appear an inquiry and Nicola Sturgeon is going to appear probably at that inquiry as well to answer questions on how the internal party disciplinary system worked and did people know things before they said they knew things publicly. So there are divisions within the SNP and those all feed into of course how they go ahead if they win a parliamentary majority and try to legislate for a referendum.

Jacob Shapiro:

Yeah, it's a difficult road ahead. All right, let's think a little bit, let's zoom out a little bit and talk about Scotland in the world. And you alluded to this a little bit when you were talking about how the SNP doesn't really have a good plan for what happens next. Part of the reason they don't have a good plan is because nobody's willing to play ball with them to use the American expression. The UK obviously wants to keep Scotland in the fold. So they're not going to talk about being cooperative until the last possible moment that they have to. Right after the Brexit vote, I remember Sturgeon went to Brussels hat in hand sort of expecting a warm welcome there and she got basically a cold shoulder. Wasn't getting meetings from EU officials and the EU doesn't want to be seen as intervening in any way in UK politics because of the precedent it sets in places like Spain and Catalonia and other places throughout the European Union.

Jacob Shapiro:

So I think that and one of the most convincing arguments to me is that Scotland has a very difficult road ahead if it wants independence. I do think however that my suspicion is that the moment that Scotland has a legally sanctioned referendum and votes for independence, if those two things happen, I think the EU would open its



arms at that point to Scotland and start behaving a little bit more differently. Do you think that's the case that the EU is just going to be reticent of the whole thing and doesn't want to inflame tensions anymore than they already are with the British government?

Tom Macleod:

Yeah, it's tough isn't it in all these situations. Politicians need to basically say nothing for a long time and then they'd be open to the possibility of saying more should the situation change. I mean, certainly some Spanish politicians and even those based in Catalonia have said on the record and on a few occasions that Scottish accession to the EU would not be stopped by them because effectively Scotland would be a brand new state. So it would be considered as such. So the Catalonia question and blocking anything, blocking any accession would not come into play. Now that's what they've said a couple of times on the record, who knows what will happen if that actually becomes a reality.

Tom Macleod:

So it remains to be seen what would happen in reality. But right now it seems like Scotland would be treated as a brand new states and like any other states if it was going through an application process to the European Union. I think I sense you probably are right and I was on event a few weeks ago with a few European politicians, few MEPs who said, "Listen, we cannot get involved in this or express a preference one way or another on the Scottish independence issue. And we would never get involved in the matters of the United Kingdom and it's devolved nations." But I get the sense that you're probably right. If it was to happen and Scotland on day one of independence said one of our priorities is to start the accession process into the European Union, why wouldn't European politicians looking at a new state treat it like any other new state.

Tom Macleod:

And Scotland remember, if it was an independent country, it would be a liberal democracy. It would be a free market trading nation. So why wouldn't it be treated as any other nation would? It would obviously have to go through that process and we're talking about four or five years, possibly even longer, depending on what the currency situation is. But I think you're right. I get the sense if it was to happen and it was to happen legally, the UK government allow Scotland to legislate for a referendum, that referendum results in a yes vote, Scotland then has to negotiate an agreement with the rest of the UK and potentially the European Union. But if it all followed a legitimate legal process, I don't see any reason why the European Union wouldn't treat Scotland like any other country.

Jacob Shapiro:

Yeah, although I don't know if that's good enough for Scotland because as you said, a four or five year accession process especially if the UK relationship is not particularly good might not work for Scotland if it's trying to get its house in order.

Tom Macleod:

Exactly and I think the biggest red flag there is the currency issue because at this point in time I think I'm right in saying European Union require you to have your own currency to apply for membership to then transfer eventually to the Europe. And Scotland suddenly creating its own currency rather than pegging to the pound after independence is also fraught with concern as well because then it's subject to the international markets as a brand new currency in a brand new nation. So would it be stable enough to pass the EUs checks? These are all questions that I think will need to be answered in a lot more detail should another referendum be legislated for. But if they are all answered and done so in a satisfactory manner, Scotland isn't going to suddenly go and join the EU within six months, it's going to be several years. And I think that's something that we all need to be mindful of whatever position you take on independence, whether a yes or no vote.

Jacob Shapiro:

Yeah, for some reason that makes me think of Scotland becoming the first country to use Bitcoin or some other crypto national currency.

Tom Macleod:

Or maybe they-

Jacob Shapiro:

Maybe they-

Tom Macleod:

Maybe they should just shot GameStop or whatever it is that I'm reading about.

Jacob Shapiro:

Well, that's the real joke, isn't it? I mean, I'm somebody who advises companies on a daily basis. I like to manage my own retirement account too. And all of my advices for now, I should've just told everybody to buy as much GameStop stock as they could have six months ago and they'd be doing much better than having taken any other advice. Who knows what's going on there. In terms of other Scottish important relationships to think about, obviously, I'm here in the United States and I'm curious about your take there too because obviously, the UK and the United States have a very close, quote and quote, "special relationship." They are part of the Five Eyes intelligence sharing agreement.

Jacob Shapiro:

And one of the questions that I has started thinking about seriously myself is let's say that all the ifs, everything happens in Scotland becomes an independent country, do the Five Eyes become the six eyes, is Scotland going to automatically sort of lock in to the general Anglo-American, Australian, Canadian alliance network. I shouldn't leave out New Zealand, New Zealand as well or do you think we see a return to what really was Scottish Grants grand strategy before the Acts of Union, which was



looking towards Europe playing France and other continental powers off the British government in order to create a more secure prosperous Scotland? Do you feel like Scotland goes back to, I guess, being oriented toward the European continent or does it just become an independent cog in that Anglo-American alliance structure?

Tom Macleod:

I think in an ideal world, they tried to do a bit of both, wouldn't they? But certainly, the noises from the SNP are that Europe is Scotland's priority. So re-engaging with Europe and joining the European Union is a priority for an independent Scotland. That's not to say the US relationship and relationships with other countries are not important, but the primary focus I think for an independent Scotland certainly has to be its relationship with the rest of the UK and then the rest of Europe. Scotland's a European country. It's not a North American or any other country. So their most important relationship will be with their closest neighbors.

Tom Macleod:

Now having said that, obviously the US relationship particularly on trade for Scotland is massive. I think the US is Scotland's second biggest export destination and that's crucial. And if you were thinking about an independent Scotland, you've also got its geo strategic location. Scotland as a part of the United Kingdom hosts the Trident submarines, which is what Britain's nuclear warheads attached to. It's got an RAF base in the North East of Scotland that NATO used and all regions use. The US beside an aircraft there, Euro Typhoon aircraft are there. So what happens to all these places when Scotland becomes independent and that in some respects give Scotland a little bit of leverage. There's been some suggestion that they potentially lease those military bases out to the rest of the UK.

Tom Macleod:

Rather than move your nuclear deterrent, why not make some money off of it and lease it. That has particular issues for those in the SNP who wants non new... They're against nuclear proliferation and they actually want the eradication of nuclear weapons. But it is something Scotland has that could be used in any sort of new foreign policy and new diplomacy. So the relationship with Europe I think is what SNP politicians would say is most important. But they have things there. And the Scottish government already really interestingly has its own external affairs department. So while foreign policy is a UK matter, defense and foreign policy is for the UK government, there is this niche for the Scottish government to build relationships.

Tom Macleod:

And they're mainly cultural and trade-based and business-based, but they can build these relationships with other countries. And there's a strategy for engagement with the US, Pakistan, China, India, Canada. The Scottish government has its own offices around the world as well. So those would have to be scaled up dramatically if you became an independent country. But certainly, and it'd be interesting to hear your take as an American. Scotland is not going to be at the top of the in-tray for any



American administration. But there are links there, there are cultural links, there are diaspora links that could be played on and leveraged perhaps by a small European country to build those relationships. But I think in terms of Five Eyes, GCHQ and all that, Scotland isn't going to be a huge part of that. It's a small independent European country.

Jacob Shapiro:

Yeah, it's the most complicated question all this to me, even more so than the currency. I sort of see the path forward in terms of currency, it will be difficult, it'll be painful, but there are solutions there. When you start getting down to the military forces and the security forces though, the questions become a lot trickier and a lot harder to disentangle. And I think how the United States is going to treat the situation is really going to depend with what the relationship is between Scotland and the rest of Britain in the case of independence.

Jacob Shapiro:

So if there's an antagonistic relationship there and if we're going back to what Great Britain looked like hundreds of years ago, where England was having to constantly watch its back because it had what was basically an unfriendly power on its same Island, that's one set of considerations for the United States to consider going forward and would be the worst case scenario for the United States. United States is starting this strategic adversary relationship with China. It's got its problems with Russia. Trying to rebuild alliance is the last thing you need is a crack of this magnitude and the most important US ally on the map probably right now.

Jacob Shapiro:

But on the flip side, if there is some kind of polite structure that is set up where Scotland is understood to have its independence, but it's still broadly integrated into a general framework and where everything is still cooperative, where you get sovereignty and independence on matters that satisfy those who have that visceral need to see the Scottish flag hoisted up as the only flag versus having all these other aspects, which is currency, things like that, then maybe you could try and work them in and use the US consumer market and use trade policy in order to attract Scotland more into that framework, whether it's the Five Eyes, whether it's trying to rebuild the TPP and enticing Scotland to come at in that direction. But again, I think for the United States, it's going to take its lead there probably from how the British government is feeling about this. And if the British government were to take the approach that Spain did with Catalonia, then I don't see that the United States is going to be at least outwardly friendly at the beginning and it's probably going to try and play that same role that it did in the Good Friday Agreement be the mediator sort of thing.

Tom Macleod:

Yeah, I would say-

Jacob Shapiro:

But it-

Tom Macleod:

I'd say that the desire and want of the SNP, if you're talking to an SNP politician would be absolutely to have good relationships with the rest of the UK that meaning mainly Westminster and it would be catastrophic for that not to be the case. So I think they would tell you that probably their number one priority because Europe would be their number two, their number one priority would be good relations and a good relationship with the Westminster government regardless of what some mudslinging might've been during the referendum campaign.

Tom Macleod:

So how that then plays into, like you said, a US consideration. And one other things I wanted to ask you is there's part of Scotland's external affairs strategy that's very focused on the Arctic. Scotland would be North Atlantic ocean independent states and there are obviously considerations there for the United States. And that ties into both their strategic and battles with Russia and China. And if you think about Scotland potentially having rejoined the European Union geographically located where it is is that not an appealing prospect for any American administration as an English speaking bridge to Europe based near the Arctic?

Jacob Shapiro:

I'm sure you see the irony in the United States wanting an English speaking bridge to the European Union because it lost that English speaking bridge with Brexit. Yeah, no, the Arctic is a very interesting point. I honestly hadn't thought of it. And that would put... Scotland would be... It's a very rarefied air of countries that actually have tangible interest there. And if Scotland was independent, it would be one of them. You'd be playing with China and Russia, Norway, the United States, Canada. And that's basically the list right there. But yeah, I think it's not so much... I mean, yes, there is the strategic location of Scotland is important for the United States.

Jacob Shapiro:

But what's important for the United States is that whatever the political structure in Great Britain that it has a tight relationship with everything that is on the Island because the moment you start dividing Britain into camps that aren't on the same page and God forbid even worse are actually competitive and starting to get back to that sort of international policy framework, it's a problem for the United States because then you don't have that location lockdown. It's a whole set of different considerations. And even if it's not likely that there's going to be some kind of conflict, the folks who are planning risk have to plan with worst case scenarios in mind.

Jacob Shapiro:

So if you have a Scotland and England that aren't on the same page and there is doubt about who controls what base or who controls what weapons or whose interests are going to be tied to what, Scotland going to be listening to a DeGaulle

lists France that wants more of a national security role in the world. Is Scotland going to be so interested in selling Scotch to the Chinese market that it's willing to make compromises there? Suddenly there's a whole matrix of risks that you didn't have to deal with before that you suddenly have to start thinking through. And I think that's probably a headache for US strategic decision makers that I don't think they've thought through enough. I think they're assuming that this is going to go away and the sort of Johnson's attitude about, oh, this is a relevant, it's not a big deal is right and I think that's a mistake. I think the United States needs to start thinking now about what position it's going to take in regards to these things if this comes to pass.

Tom Macleod:

There's potentially an interesting precedent though in terms of relations with the United Kingdom and their border country because you've got the US obviously excellent links with the Republic of Ireland, which has a land border with the United Kingdom through Northern Ireland. And while there have-

Jacob Shapiro:

I know.

Tom Macleod:

Of course been horrible historical tension there, but more recently political tension with Brexit. There's an instructive case there in American administration under Joe Biden having very good links with Ireland, but also wanting what you've outlined, a good relationship with the Westminster government. So maybe some Scottish nationalists would say to you, "Well, why would a peaceful Scotland sharing a border with England potentially as a bridge to Europe not be a similar sort of thing and maybe take out..." Scotland is a small country. It's not going to be a military force or a defense force for much consideration for someone like the United States. But Ireland and Scottish politicians would say this to you. They're working on Republic of Irish playbook because the Irish have a highly effective foreign diplomacy and strategy. They've got the caucus in the States. Scotland would probably look to emulate that. They've got fantastic wings into Europe. Scotland would probably look to emulate that. So there's a potential precedent there in how to go about that.

Jacob Shapiro:

Yeah, but that precedent will make any American strategic decision-maker extremely nervous. And this goes back to, we mentioned the Five Eyes a little bit earlier. I guess, I should say for the listeners, the Five Eyes is the wonky pretentious name for the intelligence sharing agreement between Canada, the United States, Australia, New Zealand and the UK. If anybody out there has a better name for it than the Five Eyes, please feel free to write to us. It's such a mouthful and I don't like it. But I've never figured out what... The Anglosphere also is terrible. All of it is bad.

Jacob Shapiro:

So if anybody out there has a creative solution there, please write in and let me know because it gives me a headache. But Irish precedent would make an American



decision-maker nervous. And the reason I say that and went on the Five Eyes tangent was because Five Eyes started because of World War II. There was no Five Eyes before World War II. Even after World War I, the United States had emergency war plans in case they were going to fight a war with Britain over Canada. I think it was likely, but those plans were on the books. They've been declassified. What happened in the context of World War II that started as an intelligence sharing agreement between just the United States and the UK and then was broadened in for Australia, New Zealand, all these other things. The Five Eyes is basically still running on those agreements. It was that moment, that crucible that really forged the special relationship. If you go sort of pre 1940s, it's not the same sort of relationship.

Jacob Shapiro:

But it's the Five Eyes. There was no Ireland, not because Ireland was more open to Nazi Germany and Ireland didn't want to be in with the United States and the United States didn't trust that information that was going to be shared potentially with Ireland, which was trying to play all sides was going to stay within there. So if you're using the Irish policy playbook, yes, in recent decades, what Ireland has done is a good way for Scotland to think about how to structure external affairs or foreign affairs and build up its relationships and diplomacy and things like that. But if you look back at history, if you're going to be that pragmatic middle person, if you're going to... The way that Qatar tries to play all sides in the Middle East.

Jacob Shapiro:

If that's your blueprint going forward, the United States is going to treat you very differently, which is why I say Scotland has to sort of have in its head are we going to be the Sixth Eye, but we're also going to have our feet in the European Union or are we a European power or a Scottish power that happens to have this history of relationships with the United States and those other partners, but it's not going to be the thing that animates our grand strategy going forward? When Scotland did have foreign policy in the past before the 1700s, it was very much cooperating with Europe. It was very much, we need to use France or these continental powers in order to maximize sovereignty for ourselves on the Island itself. It's obviously a much different world than it was pre 1700s. But those are the questions suddenly that we have to start thinking about. And there are limits I think to how far you can play forward the Irish scenario if your goal is to maintain as close a relationship with the United States that Scotland enjoys now as part of the UK.

Tom Macleod:

That's interesting and then perhaps leads onto wider questions about the European Union and how the Biden administration does approach that because by no means are the US administration and European Union on the same page on a number of issues?

Jacob Shapiro:

Yeah, I was just talking about this on the previous call before we got on which is to say we just saw with the United States and Germany, Merkel and Biden had their first



phone call. And I don't know if folks have really realized this yet. But the Biden readout of that call that got published on the White House website mentioned the Germany and the United States have agreed to cooperate on all sorts of issues like Russia and China and the Western Balkans, Iran, climate change, et cetera. The German readout didn't say anything about China. And I think that Americans probably don't understand the extent to which the Trump administration really did serious damage to the US-EU relationship, the US-German relationship and that it's not damage that Biden is going to be able to snap his fingers and fix overnight because Germany, France, they've realized they need to be more independent. They're going to think more in terms of their own national self-interest than being part of this US alliance network.

Tom Macleod:

But also is it not broadly one that although Trump has set that table for the Biden administration, it's one that they don't necessarily disagree with. And while there's a big song and dance about re-engaging with Europe, they actually broadly share the same thoughts as the Trump administration particularly when it comes to China and Russia. And you're right, that readout of the call was very different and very instructive as to where this potentially is going to go the next few months. And it's Germany in particular, but France as well saying we are going to take care of ourselves and we are going to have a different relationship particularly with Russia and the Germans signing up investment deal with China than you are across the Atlantic.

Jacob Shapiro:

Yeah, and New Zealand also upgraded their free trade agreement with China this week too. So I mean, the fruits of the Trump administration's labor are evident everywhere. I will say that the Biden administration on China, yes. I don't think there's much of a change in terms of overall viewpoint in the US-China relationship. On Europe though, it's radically different. I mean, in geopolitics, we talked most about the US-China trade war. The Trump administration declared a trade war basically on the European Union as well. To my own personal chagrin, we're having to pay tariffs on French wine and French cheese. I'm personally offended by this and always have been because I like French wine and French cheese and screw you all for messing with me cheese-

Tom Macleod:

It's all right man. American cheese doesn't, no offense to American listeners, just doesn't quite stack up, does it?

Jacob Shapiro:

No, it doesn't. And it was just in the midst of a pandemic, you're killing one of the few things that gives people joy in this world. I sound very elitist now talking about how I needed my access to French cheese during the pandemic. But anyway, um yeah, the Biden administration thinks radically different about Europe. They want to re-engage with Europe. They want things to go back exactly the way they were the day before





Trump went into office and to proceed forward from there. And it's just not going to happen that way. I do think however the Biden administration will bend over backwards to try and repair the relationship. And it's got to be a long-term play because the trust there was broken and the European Union might and should trust the goodwill of the Biden administration towards European powers.

Jacob Shapiro:

But the question is who comes after Biden? Is this just another four year interlude and then there's going to be a massive shift back to America first. Biden isn't even sure that he's going to have a second term. Or is his successor going to think the same way about Europe? So I think Biden has to begin a multi-year, if not decades, long process of trying to rebuild that trust. And in the meantime as you alluded to, a lot of these European countries, it's a difficult economic environment. You're going to try and get yours as you can. And the Chinese market for all of the problems with China, whether it's in Xinjiang or Tibet or Hong Kong, it's also a billion people than a middle-class that's going to be larger than the entire population of the United States. If your economies are built on exports like the Europeans are around Germany, those are the people you want to sell to.

Tom Macleod:

So how does Joe Biden square that circle like deeply engagement with Europe wanting to go back to what you consider the sort of transatlantic norm, but you have a situation where... I mean, switching to focus on Russia, you've got the Germans who wants to finish Nord Stream 2 and for gas to bypass Ukraine and feed Europe straight from Russia. And she's been angled. America's been very, very quiet about Alexey Navalny and his poisoning. Actually, she was pretty quiet about Salisbury when it happened here in the UK a few years ago as well. So how does Biden negotiates that relationship and his own relationship with Russia at the same time?

Jacob Shapiro:

Yeah, the Russia relationship from the US perspective, Russia is very weak. And I shouldn't say that I don't take Russia seriously. But just that the United States and Russia, if you were actually just looking at the straight interests, forget the history of conflict and the Cold War and all the baggage and interference in each other's affairs, if you'd just look at the rock solid interests, they're actually not that divergent. There's obviously some differences when it comes to Slavic majority regions in Eastern Europe and that's really the place where things get most difficult. But those aren't insurmountable. If you had some requisite level of, not even trust, just pragmatic engagement on both sides, I think you would be able to improve it.

Jacob Shapiro:

That sort of cold, hard reading of the geopolitical interest has not defined the relationship. They have become each other's boogeyman for a lot of different reasons and I don't see any way of getting out of that necessarily. But I think the European instinct here is the right one. If the United States is going to pick a fight with China and it definitely seems like under the Biden administration, the fight that



the Trump administration picked, the Biden administration can finish it, you can't take on China and Russia at the same time. That's bad policy. Remember the US-China relationship got better precisely because Nixon decided he needed to enlist Communist China in order to win the Cold War against the Soviet Union. That was the pragmatic level of thinking there.

Jacob Shapiro:

You can't just say, okay, both of these countries are our enemies and we're going to go after them in a hard way. I think that the point that Germany and France and some of these other countries make, even though it's uncomfortable understandably so for the Eastern European is that Russia is a European power. You can't treat it as anything other than a European power. And if you're going to isolate them and shove them into the waiting arms of China or make them this force that is at least creating a more multipolar environment where Europe and the United States force multipliers are reduced, that's not a good thing. And Russia is a country that you can probably deal with. There isn't this international ideology of the global proletariat rising up anymore. There's Putin riding dolphins without a shirt on with a little bit of Russian nationalism.

Tom Macleod:

Does that-

Jacob Shapiro:

What-

Tom Macleod:

Does that still hold though even because broadly Obama, you could say tried to do the same thing and then events took over. You couldn't foresee what was going to happen necessarily. Events took over and you've obviously just had a major cyber attack on your own infrastructure, which is being pointed, the finger of blame is being pointed at the Russians. So can you pursue that strategy if events like that take over?

Jacob Shapiro:

Probably not. And this is where geopolitics really succumbs to politics of the moment. And it doesn't matter sometimes that the interests are aligned up if there isn't trust or if there isn't relationships on the ground, then things can't proceed forward. So yeah, I think the Biden administration will have its hands tied behind its back. I also think in general, the geopolitics is more realist. It tries to take a lot of the ideology out of politics, which in a realist environment actually allows it to be more predictive. But in an environment where ideology matters, geopolitics becomes less predictive I think and less operative. And you're seeing that now with the new US administration, which is much more emphatic about human rights, whether that's in Xinjiang, whether that's with Navalny, who is his own sort of complicated man himself. And that sort of rhetoric we haven't seen since the second Bush administration. That's how the US behaved back then. So even Obama, I mean, yes,



there was that move to reset with Russia. But these are not things that sort of happen overnight.

Tom Macleod:

And just going back to what you were saying about this being the approach to China with the Biden administration and how that relates to Europe as well is a card that the UK and Boris Johnson will be particularly keen to play because on that particular issue in comparison to mainland Europe, the UK does stand some more to parts in terms of the major players like Germany and France. And it's linking up with the Biden administration and has no qualms doing so on its denunciation of China.

Jacob Shapiro:

They are now, but they didn't want to at first. That took some cajoling I think because I mean, remember the British government was trying to insist back when all this started with Huawei and having to strip Huawei from 5G networks. The GCHQ first thing was no, no, we're fine. We can manage the risk here. We don't have to banish Huawei. We don't have to spend however many billions of pounds it's going to take to rip and replace all this hardware and software. Let us deal with China. And Boris Johnson held that line for a couple of months before switching. And that I think goes to and this is instructive for Scotland. That shows you right there that even though the UK had its own interests relative to China, ultimately, it threw in with the United States because the relationship with the United States was the most important thing. And the Trump administration was very clear that if you're not a board, the anti-Huawei train, you're not in the US alliance.

Tom Macleod:

Yeah, and-

Jacob Shapiro:

crosstalk

Tom Macleod:

Actually the potential reasoning for Boris Johnson doing that was of course to try and speed up any US-UK trade deal for when the Brexit transition period ended, which has not happened as we talk today and may not even happen in the shape or form that the UK government wanted it to happen at all. But it doesn't change the fact that still right now, they are aligned for whatever the reasons might've been and even if it didn't come to fruition for the UK government, they still find themselves aligned on that particular issue as of today.

Jacob Shapiro:

Tom, before we get you out of here, let's play a little game that I started two podcasts ago and it was so popular that apparently, I'm going to be closing most podcasts with this little game. So the game is called over-under. And I'm going to give you sort of a number and a prompt and you have to tell me whether the prompt



is over or under the number I give you. It's hard to explain. But once you get the first one, you'll understand what's going on here and we can go back and forth on the number two on each one. So I've got a few of these for you. So over-under 10 years of Northern Ireland remaining in the United Kingdom?

Tom Macleod:

Over.

Jacob Shapiro:

Over, tell me why.

Tom Macleod:

Well, I think Northern Ireland is a very different case to Scotland and this will be linked a little bit or born primarily to Brexit, but it's a longer road. It's a longer sort of game plan for anyone who's trying to work it out I think. It does face unique challenges for Brexit and it's worth bearing in mind as well. Northern Ireland voted in favor of remaining in the EU by 56 to 44 margin. But at the time and it was governed first minister, Arlene Foster by someone who advocated for leave. But the deal that's been done between the UK and the EU that came into effect on the 1st of January, it does have some positive aspects for Northern Ireland.

Tom Macleod:

It takes lots of billions of pounds of tariffs off goods, but it has created a de facto border in the Irish sea between Northern Ireland and mainland Britain that already in the first few weeks of the month has resulted in much more checks for things like food coming from Britain to Northern Ireland, lack of choice on the shelves for people going into shops in Northern Ireland. But at the same time, the polling does show that there is no enthusiasm for a reunification poll on the Island of Ireland.

Tom Macleod:

And indeed the Irish prime minister has said not for at least five years is this going to be proposed any sort of reunification poll and because of the Good Friday Agreement, you have to have both the Republic of Ireland and Northern Ireland hold a pole on a referendum before you then have a referendum for a united Ireland. So given that the Irish prime minister has said five years at least, it's not going to happen within the next five years. And we have so much more of Brexit to go. That's why I'll play more than 10.

Jacob Shapiro:

Yeah, for devil's advocate, I'll say the argument for under of course is that the demographics in Northern Ireland are shifting away and heading more towards Catholic and more towards pro Irish sentiments. But I think you have your finger on the key variable that folks are not paying attention to, which is Ireland has to want this too.



Tom Macleod:  
Yeah.

Jacob Shapiro:  
But also part of the Good Friday Agreement is that once it seems like Northern Ireland is going to want to unify with the Republic of Ireland, you have to have the referendum too.

Tom Macleod:  
Yeah.

Jacob Shapiro:  
So it'll happen eventually, but we'll have to see what kind of timeframe we're talking about.

Tom Macleod:  
And interestingly when you mentioned demographics there, another interesting thing that's happening I think I saw a poll in the Belfast Telegraph newspaper that said 40% of people surveyed wouldn't class themselves as either unionists or nationalist. So there's an interest. And I don't know whether that corresponds to youth in Northern Ireland, but there is an interesting change going on there and how people see themselves.

Jacob Shapiro:  
It sounds like we need an independent Republic of North Ireland just to complicate the situation.

Tom Macleod:  
I think they are about that.

Jacob Shapiro:  
All right, over-under two more years of Boris Johnson as prime minister of the United Kingdom?

Tom Macleod:  
Over.

Jacob Shapiro:  
Over, tell me why.

Tom Macleod:  
I think, well, first of all, there's no mandated election until 2025 I don't think and I have... My answer might've been different this time last year because of the way the

pandemic has panned out. But crucially, the UK is in a good looking position right now in terms of vaccines and that is one of the things that it seems the UK government has managed to do very well. And we are near the top of the league table in terms of numbers of people we've vaccinated so far. We've got millions more doses come in. Actually, more than we need if all the vaccines are approved. And hopefully, those who get shared out are those who need it a bit more. But there is a new... This has been a horrific story for the UK, but there is a good story coming out of it to be told and that's about vaccines and the strength of British science. And I think for that reason, coupled with the fact that there's no mandated election for over two years anyway I think he will still be there in two years time.

Jacob Shapiro:

I tend to agree. Boris Johnson's is many things and he's controversial and colorful. But he has also for all of his faults and strengths, he's a brilliant politician. So I wouldn't count against him on that score. I think we'll have the votes.

Tom Macleod:

There's an interesting theory that if Scotland does vote for the referendum. If the SNP win a majority in May and the pressure becomes untenable for Westminster to agree to a referendum that Boris Johnson would set the date, but then leave before the referendum happens. That is just pure speculation. But it's an interesting thing to think about.

Jacob Shapiro:

All right, we've got two more of these and here's maybe the hardest one for you. Over-under five years until Scotland's next independence referendum?

Tom Macleod:

I think it will be under that. I do. I think all the polling right now points towards an SNP majority in the elections in May and they'll increase. They're currently leading a minority government. But if the polls are correct, they will be the majority government. That's then 14, 15, 16 years in power in the Scottish Parliament. And I do think regardless of what Westminster politicians say because of course they will not say right now that Scotland should have another independence referendum. I think if you are a democratic country, it becomes pretty untenable to keep saying no to an electorate that vote in a party whose mandate is to have an independence referendum. So-

Jacob Shapiro:

Does your answer change at all if the prompt is over-under five years until a UK sanctioned, Scottish independence referendum or is it the same answer?

Tom Macleod:

Same answer I think because I think I can't speak for the SNP, but it would raise my eyebrows if they went for a non-sanctioned referendum and then declared

independence that route rather than have it sanctioned by Westminster. It would surprise me. That's not... After the few years we've had, little surprises me. But that would still surprise me slightly and I think I would stick with my original answer.

Jacob Shapiro:

All right, last one. Over-under 27 European Union member states in the year 2030?

Tom Macleod:

2030, over I think. I'm trying to think off the top of my head. Maybe you can help me. Are there any states currently going through accession processes? There are five-

Jacob Shapiro:

Macedonia, right?

Tom Macleod:

Yeah. Five recognized candidates. So obviously Turkey, which I should know because they applied way, way back. North Macedonia, Montenegro, Albania and Serbia. So I'd say they've all started accession negotiations and they all actually started more than 10 years ago now. So I will definitively say yes, there'll be over 27.

Jacob Shapiro:

Yeah, so that means that you're putting that the EU is not going to lose any members and they're going to add at least one state, whether it's Albania, North Macedonia, Scotland, et cetera. And I should have known the North Macedonia, Albania answers. But I get confused because they're also there NATO accession processes and it's that the other thing.

Tom Macleod:

I think you wanted me to think about whether Scotland would be amongst those members by 2030, I don't think so.

Jacob Shapiro:

Yeah, I have trouble seeing that as well. But as we've seen this year, things can change very fast. All right, Tom, any other questions or things you want to say before we get out of here?

Tom Macleod:

I think we've gone over quite a lot of grain there and thank you very much for having me on. It's been great to chat.

Jacob Shapiro:

Same and we'll have to have you back on again soon if you're willing.

Tom Macleod:



Absolutely. Well, May's Parliamentary elections, Jacob, May's Parliamentary elections. Let's see those turn out.

Jacob Shapiro:

Well, there we go. We can lock in a special Scottish Parliamentary election episode right now.

Tom Macleod:

That I'll gather gets US listeners juices flowing.

Jacob Shapiro:

I hope so. I hope so. I'm trying to make burns night a thing here in the US. It's slow going actually. But-

Tom Macleod:

I'm sure the Scottish diplomatic corps when they come into existence would love that to be the case.

Jacob Shapiro:

Yeah, please if you need Scottish External Affairs Committee, if you need promotion opportunities for international Burns Day, please think of this podcast. It's willing to sponsor for a small. All right, Tom, thanks so much. We appreciate it. Cheers.

Tom Macleod:

Okay.

Jacob Shapiro:

Thanks for listening to the latest episode of the Perch Pod. If you haven't already, you can find us under the name the Perch Pod on every major streaming platform, subscribe for downloads, follow us, all that good stuff. If you have feedback on this episode or in any episode, you can email us at [info@perchperspectives.com](mailto:info@perchperspectives.com). I can't promise that we'll reply to every single email that comes in, but I read every single one that comes in and I love hearing from listeners. So please don't be shy. You can find us on social media. Our Twitter handle is @PerchSpectives because we love a good pun. We're also on LinkedIn under Perch Perspectives.

Jacob Shapiro:

Most importantly, please check out our website. It's [www.perchperspectives.com](http://www.perchperspectives.com). Besides being able to find out more information about the company, the services that we provide and even to read samples of our work, you can also sign up for our twice a week newsletter on the most important political developments in the world. It's free. All you have to do is provide your email address. And even if you don't want to do that, you can read the posts for free on our blog. Thanks again for listening.





Please spread the word about Perch Perspectives and the Perch Pod and we'll see you out there.