

# Global Risks to the EU

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1. 186 migrants are disembarked from the rescue ship Humanity 1 in Catania. They have been rescued off the coast of Syracuse, Sicily, Italy, 30 June 2024



2. In Lviv, Volodymyr Zelenskyy and Mette Frederiksen honored the memory of the fallen defenders of Ukraine. 23 February 2024

## About 'Global Risks to the EU'

'Global Risks to the EU' (RISK-EU) is a large-scale survey designed to quantify expert perceptions of conflict-related threats to European Union interests. Launched in 2025 by the Robert Schuman Centre for Advanced Studies (RSCAS) at the European University Institute (EUI), in collaboration with the European Union Institute for Security Studies (EUISS), the Trans European Policy Studies Association (TEPSA), and the European Initiative for Security Studies (EISS), 'Global Risks to the EU' constitutes the first continent-wide dataset on global risk perceptions among European experts. About 400 respondents rank the likelihood and expected impact of 30 predefined risks affecting EU coherence, unity, security, and prosperity. By operationalising risk as a measurable construct and applying systematic scoring methods, this initiative aims to generate strategic foresight for European foreign policy.

The methodological design of 'Global Risks to the EU' draws inspiration from the 'Preventive Priorities Survey', an annual instrument implemented by the Council on Foreign Relations in the United States since 2008. Data collection was conducted drawing upon the networks associated with the EUI, EUISS, TEPSA, and the EISS. The authors are also grateful to the European Consortium for Political Research (ECPR) Standing Group on the European Union for distributing the survey.

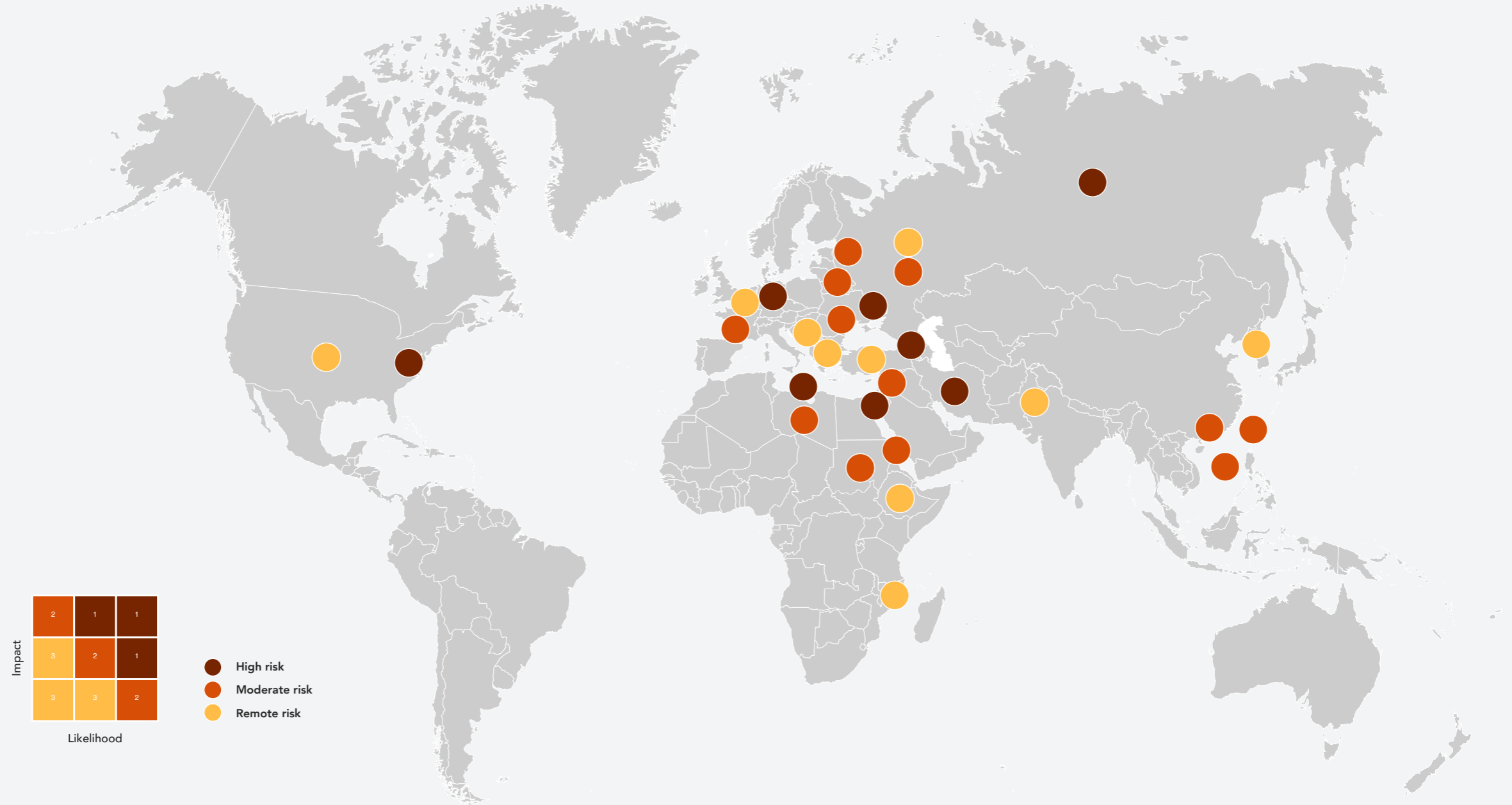
3. Veronica Anghel leads the 'Global Risks to the EU' (RISK-EU) project at the Robert Schuman Centre of the European University Institute, where she is also a Co-director of the European Governance and Politics Programme



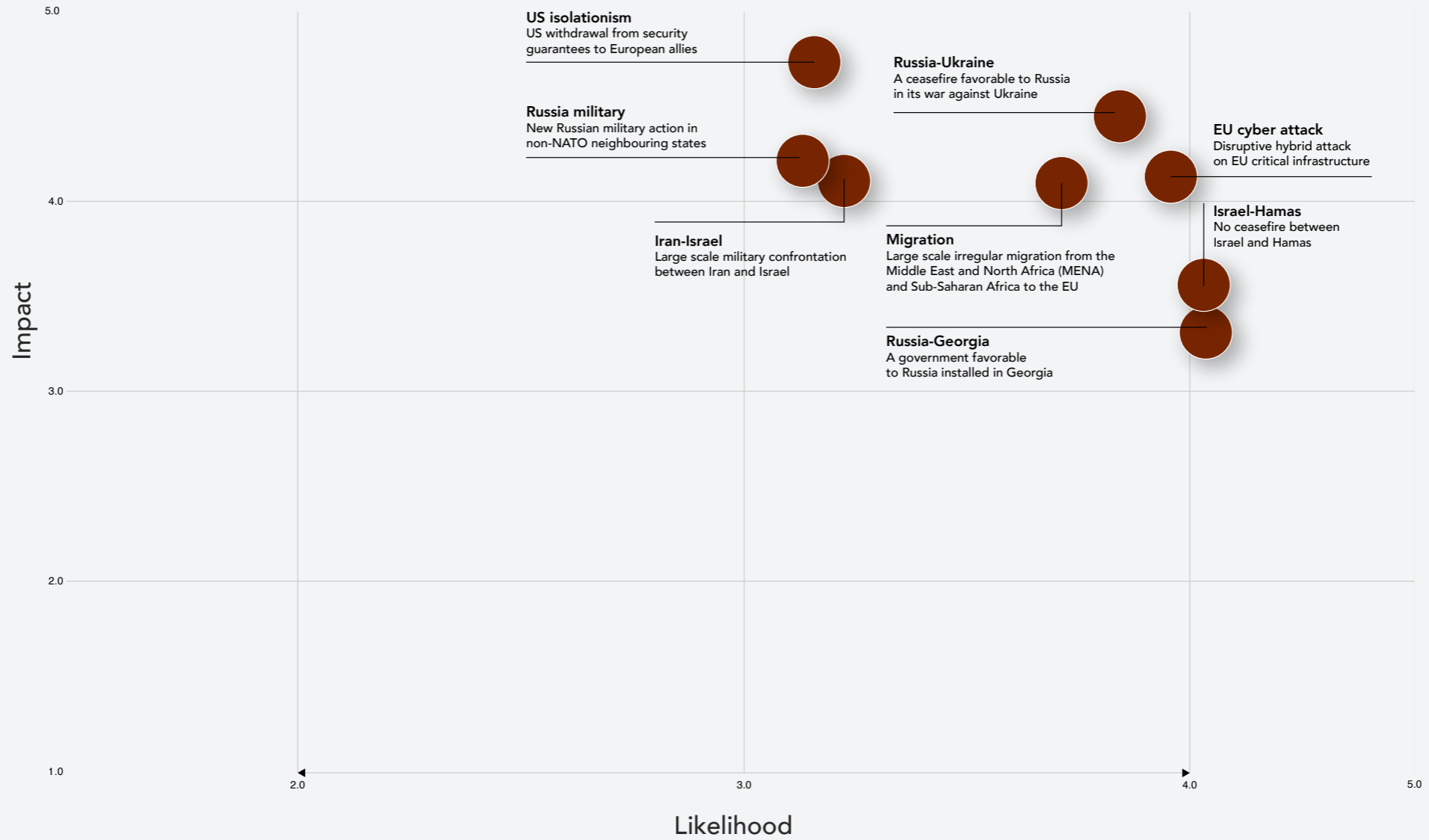
# Map of global risks to the EU in 2025

Find out more on the website:  
[europeangovernanceandpolitics.eui.eu](https://europeangovernanceandpolitics.eui.eu)

GLOBAL RISKS TO THE EU 2025

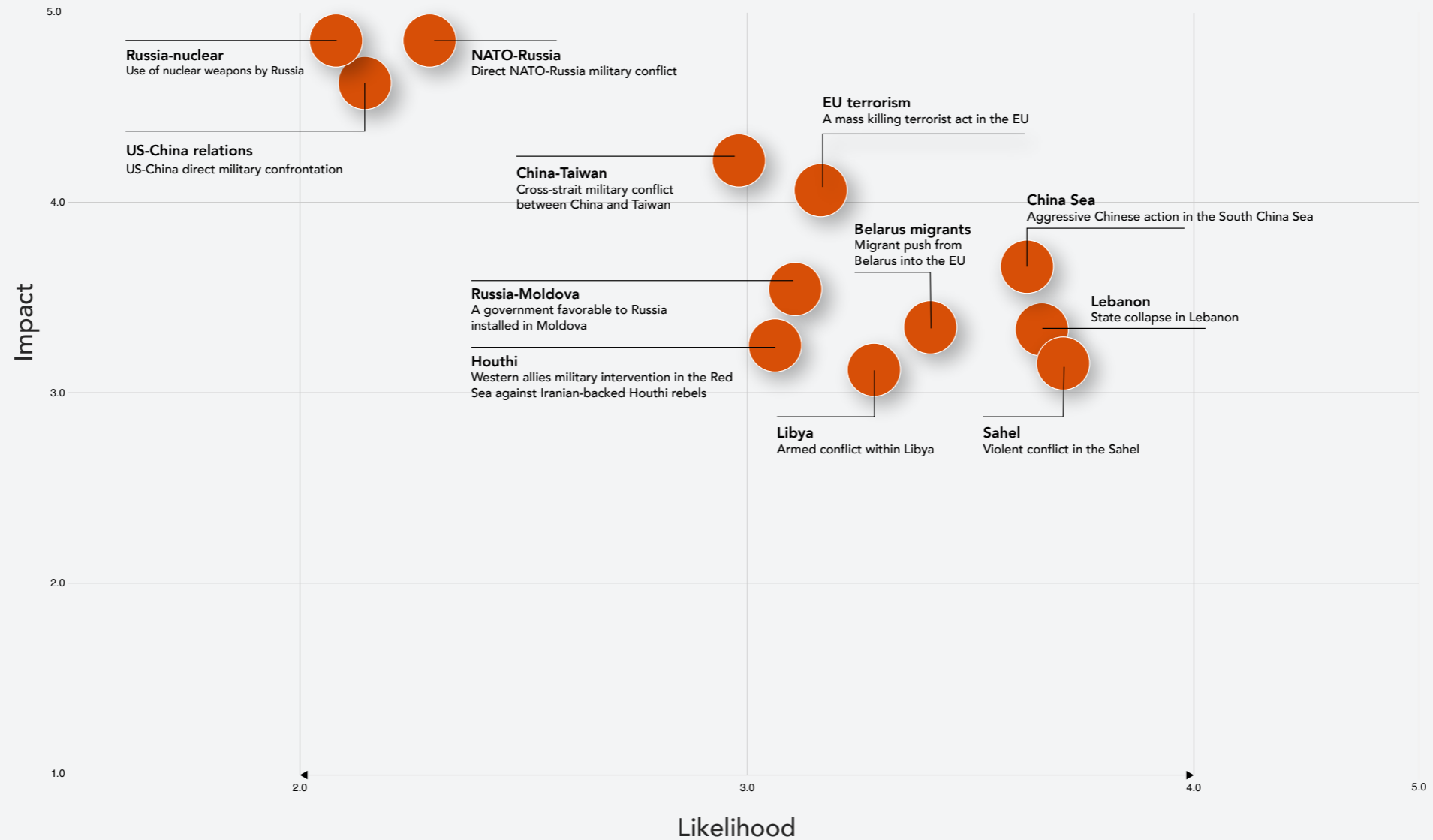


# High risks to the EU in 2025



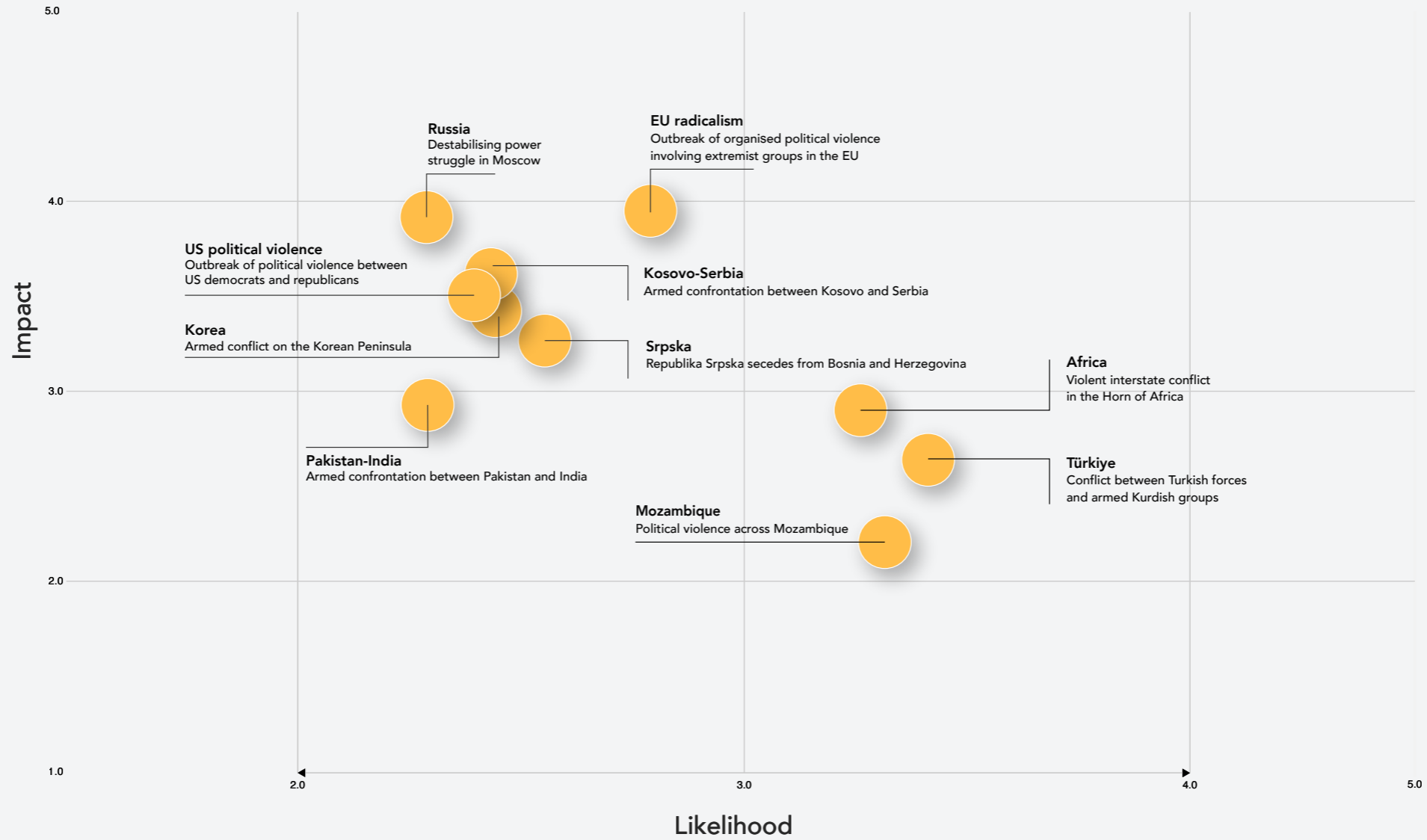
GLOBAL RISKS TO THE EU 2025

# Moderate risks to the EU in 2025



GLOBAL RISKS TO THE EU 2025

# Remote risks to the EU in 2025



GLOBAL RISKS TO THE EU 2025

## Principal findings

**Russia** features highly on the list of conflict related concerns for EU experts. Seven of the survey's 30 risks centre on Russia's aggressive actions or destabilising potential for EU interests in 2025.

Our data shows that experts overwhelmingly view **Ukraine as a critical shield for EU interests**, with a **ceasefire favourable to Russia emerging as the highest risk for 2025**. This is not surprising. In 2022, Russia's full-scale invasion of **Ukraine** and threats toward **NATO's Eastern Flank** fundamentally disrupted the **EU's security order**. As the EU imposed sanctions and cut reliance on Russian gas, the economic models of key economies, notably **Germany**, began to falter, exposing the fragility of EU economic prosperity and competitiveness as well as the difficulty to achieve unity on **Russia policy**. This finding is especially significant given the **incoming US Trump administration's push for negotiations between Ukraine and Russia**, highlighting a potential divergence between **US and EU priorities**.

Moreover, EU experts also record a **high risk of new Russian military action** in non-NATO neighbouring states.

Experts do not expect **street protests** or **international pressure** to prevent the installation of a **pro-Russian government in Georgia** following the contested 2024 parliamentary and presidential elections. The **reversal of Georgia's European path** is seen as the highest-likelihood, high-risk scenario for 2025. **Moldova** is another key country to watch in the coming year. Experts foresee a **high-impact risk** if a **pro-Russian government** emerges after Moldova's 2025 parliamentary elections, but they assess this scenario as **significantly less likely than in Georgia**. This lower likelihood is likely attributed to the election of a pro-European president Maia Sandu in Moldova in 2024.

Expectedly, the **use of nuclear weapons by Russia** is rated as the **highest-impact potential event** for EU interests. However, experts largely see through Russia's **nuclear rhetoric**, assigning the actual use of

## Main takeaways

- A ceasefire on Russia's terms in Ukraine is the top threat to EU Interests in 2025.
- US isolationism is as dangerous for Europe as a Russian nuclear strike.
- Russia's nuclear threat is the least likely risk, but experts foresee new Russian military action in non-NATO neighboring states.
- Hybrid warfare looms: EU must brace for critical infrastructure attacks in 2025.
- Georgia slips away: The EU prepares for a pro-Russian government in Tbilisi.
- No durable peace in the Middle East: A lasting Israel-Hamas ceasefire is unlikely in 2025.

nuclear weapons by Russia the **lowest likelihood** among the **30 risks** assessed. While we categorise both a **nuclear scenario** and a **direct NATO-Russia military conflict** as **moderate risks** due to their **low likelihood**, their potential **impact remains extremely high**.

Experts do not foresee a **destabilising power struggle in Moscow**. Overall, EU specialists see conflict within the Kremlin as a low likelihood, remote risk, while they acknowledge such an event would have an elevated impact on EU interests.

The **actions and reactions of the United States**, the EU's primary ally, have an **outsized influence** on EU experts' concerns for 2025.

Remarkably, the **withdrawal of the United States from its security guarantees** towards its allies is seen as having as **high an impact on the EU as a Russian nuclear strike**. This metric captures EU reliance on the United States for its security. Experts clearly take seriously the rhetoric of US president elect Donald Trump of not automatically backing up US pledges towards NATO allies making **US isolationism a top high risk** in our assessment.

Experts view a direct **US-China military confrontation as unlikely**, despite rating the likelihood of a **cross-strait conflict between China and Taiwan** as moderately high and the chances of Chinese aggression in the South China Sea as remarkably high. This suggests a belief that even in the



4. Protest against the government.  
Tbilisi, Georgia. 29 November 2024





event of Chinese aggression against U.S. allies like Taiwan or the Philippines, a U.S. Trump administration may not take a decisive stance to defend U.S. interests in the region in 2025. However, EU experts do see the **high impact of a potential US-China conflict** on EU interests, reflecting the profound influence of great-power competition on global stability, EU security, and economic prosperity.

Experts rank the risk of a **disruptive cyber-attack on EU infrastructure** among the top threats to EU interests in 2025. Their assessment aligns with reports highlighting a significant cybersecurity threat level, driven by increased activity from hacktivists, cybercriminals, and state-sponsored groups since Russia's full-scale invasion of Ukraine. Variations in infrastructure resilience and cybercrime awareness across member states are likely to challenge EU policy coherence. Additionally, **the risk of subsea sabotage is growing**, prompting Baltic states to take increasingly assertive measures to protect subsea infrastructure.

The risk of **large-scale irregular migration from the Middle East and North Africa (MENA) and Sub-Saharan Africa to the EU** ranks as a major threat

to EU unity and coherence. Migration has been instrumentalised by far-right forces to fragment EU politics without contributing to harmonised policies. Experts foresee a continuation of such trends in 2025.

While the impact of an **outbreak of organised political violence involving extremist groups** in the EU is seen as a high impact event, the likelihood of EU radicalism in 2025 is ranked as moderate to low. A **mass terrorist attack in the EU** scores a higher likelihood than radicalism within the EU and ranks as a moderate risk for 2025.

Experts **do not foresee a durable cease-fire between Israel and Hamas in 2025**, ranking the continuation of this conflict as a top risk for EU interests. Experts, thus, confirm the high impact of this conflict on the unity and coherence of EU policy in the Middle East. They acknowledge the potential risk of a **large-scale military confrontation between Iran and Israel** as high, with both a high impact on EU interest and a moderately high likelihood. In the Middle East geopolitical landscape, experts rank the collapse of the state of Lebanon as highly likely, however with moderate effects on EU interests.



5. US Election 2024. Donald Trump defeats Kamala Harris. Washington DC, United States of America 5 November 2024

EU experts generally perceive geographically distant conflicts as posing limited risks to EU interests.

While violence along **the India-Pakistan border** persists, the likelihood of an armed confrontation between the two nations significantly impacting the EU is remote. Similarly, despite **escalating tensions between Ethiopia, Somalia, and Egypt** in the Horn of Africa—where the EU has maintained a military mission in Somalia since 2010—experts view the potential for large-scale violent conflict as a remote risk to EU interests.

In **Mozambique**, where the EU launched a military mission in September 2024 to support Mozambican armed forces, experts anticipate **ongoing violence**. However, they assess the conflict as having the lowest impact on EU interests in the coming year.

Closer to home, **potential conflict in the Western Balkans**—whether through renewed confrontation between Kosovo and Serbia or a disruptive secessionist move by Republika Srpska in Bosnia and Herzegovina—falls into the lower tiers of both likelihood and impact among the risks included in this survey.



6. Palestinians lose a house after an Israeli air strike in the city of Rafah in the southern Gaza Strip. 29 December 2023

# Methodology

## 1. Defining risks for EU interests

The project’s academic team defined the EU’s interests as ‘EU coherence, unity, security, and prosperity’. It identified the 30 most relevant potential risks to these interests in 2025 through a three-stage process. First, a horizon scanning exercise for 2025 was conducted, building on the methodology and risk items assessed in the US-based ‘Preventive Priorities Survey’ for 2024 (Council on Foreign Relations, ongoing since 2008), which evaluates global risks to US interests. Second, the team refined the selection of risks to better reflect the European Union’s current circumstances and the missions and operations of the European Union External Action Service (EEAS). This involved removing risks likely to have a lower impact on EU interests while introducing others deemed more pertinent. The selected risks were not chosen solely based on their likelihood or frequency but because their potential consequences are significant enough to warrant attention,

even if some scenarios carry a lower probability of occurring. Third, the team solicited feedback from foreign policy experts at RSCAS, EUISS, TEPSA, and EISS, incorporating their insights into the final survey script to enhance its comprehensiveness and relevance.

## 2. Launching the survey

On 8 November 2024, the survey received Ethics Clearance #20241014 from the EUI Ethics Committee. Beginning on 14 November, the EUISS, TEPSA, and EISS launched the survey within their expert communities. Additionally, the Standing Group on the European Union of the ECPR invited input from its members. In total, the survey reached 5,395 potential respondents (TEPSA: 2,000; EUISS: 700; EISS: 1300; ECPR: 1,395). The survey remained open for 16 days, during which the target of 400 unique, complete responses was surpassed. Respondents who were neither EU citizens nor EU residents were subsequently screened out. The final analytical sample included 395 respondents.

7. 2024 Magdeburg car attack. Flowers in memory of the victims at the St. John’s Church. 22 December 2024  
By LSE\_Wendland - Own work. CC BY-SA 4.0.



## 3. Ranking and analysis

The project’s team used a 5-point Likert scale to collect answers. The survey results were analysed using a standard Risk Assessment Matrix, categorising risks as ‘high’, ‘moderate’, or ‘remote’. The 30 risks examined were intentionally chosen because they represent significant and realistic threats to the EU. As a result, when these risks were evaluated, their impact scores tend to be higher on average than their likelihood scores. For transparency and replication purposes, the data was published on the EUI Cadmus Repository.

### Risk Assessment Matrix

	2	1	1
Impact	3	2	1
	3	3	2
	Likelihood		



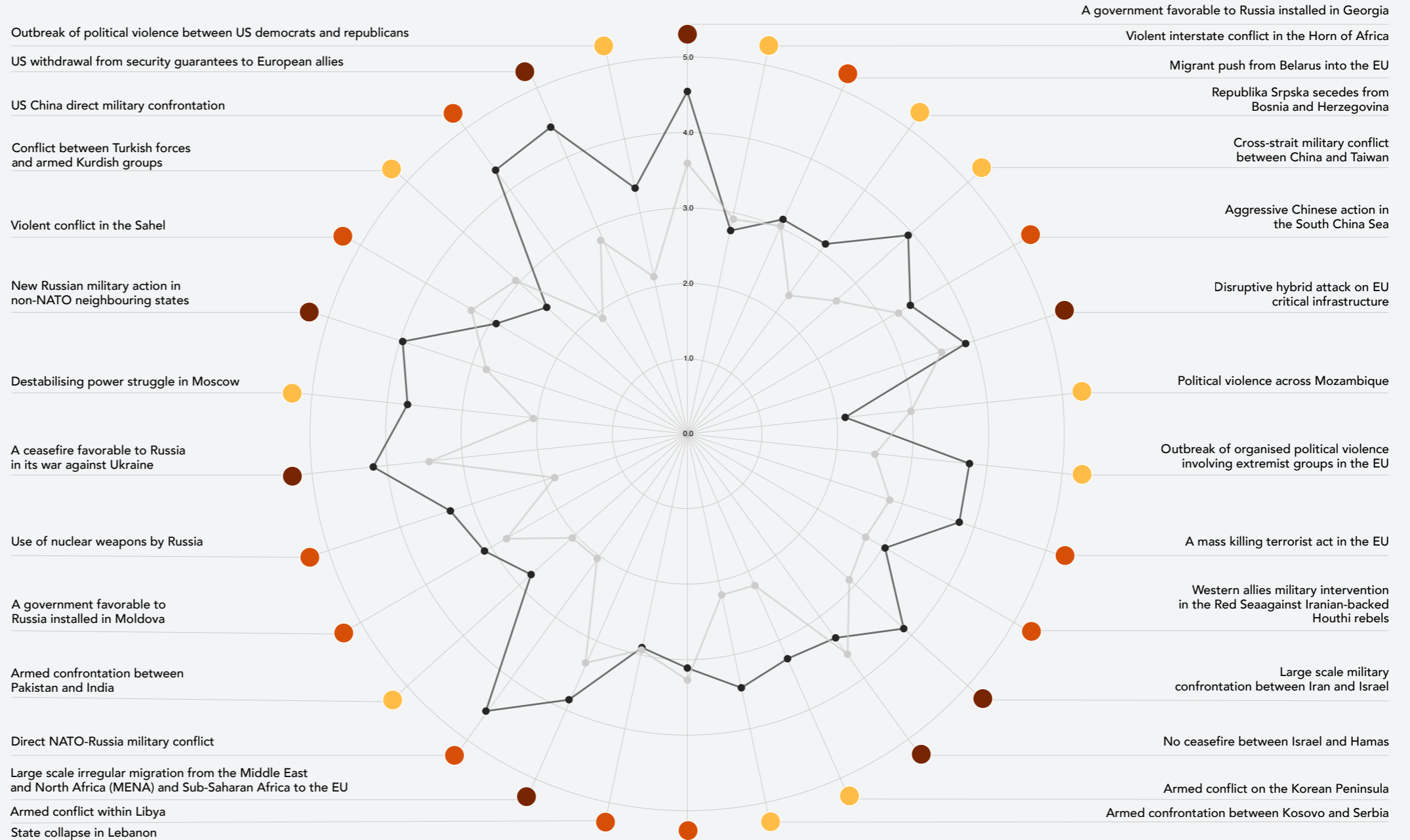
8. 10th anniversary of the National Guard of Ukraine, 26 March 2024

# Global risks to the EU 2025

## LEGEND

- Average likelihood
- Average impact
- High risk
- Moderate risk
- Remote risk

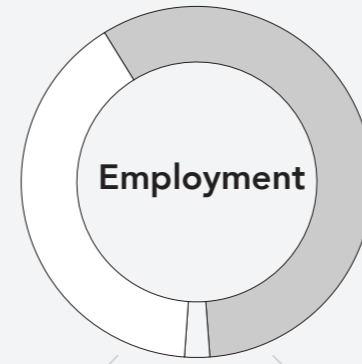
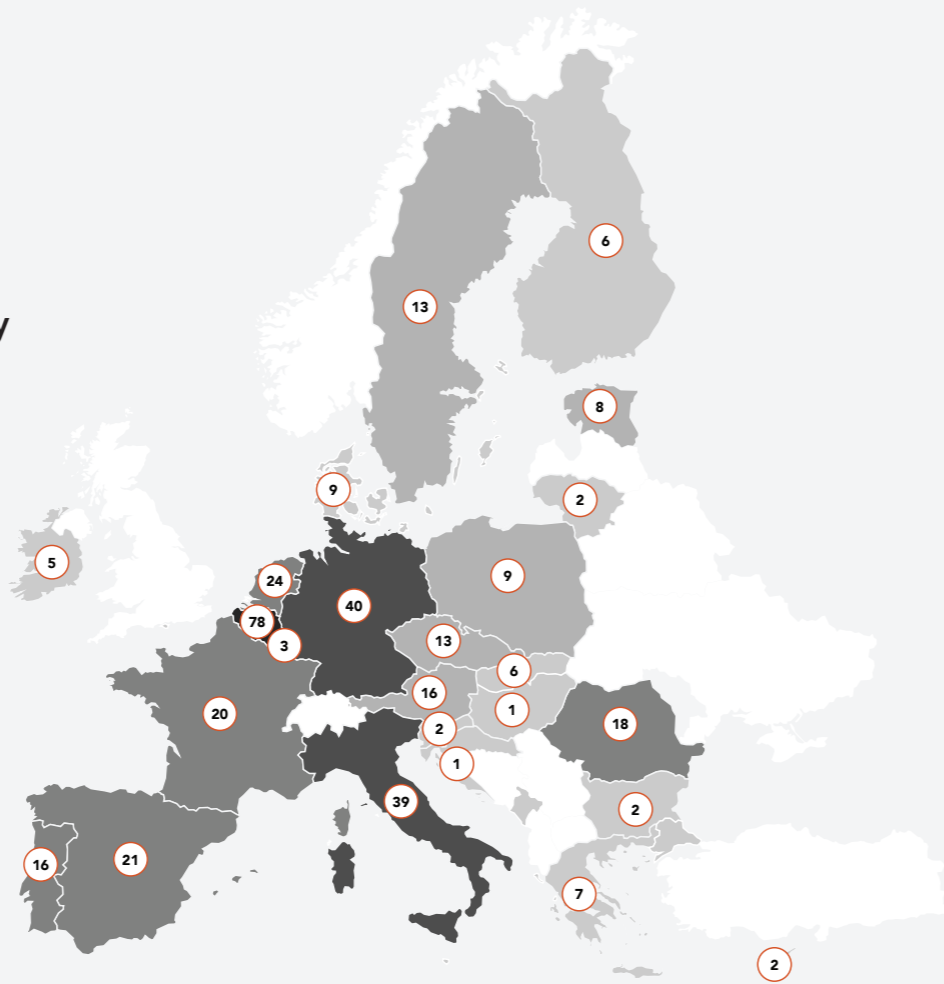
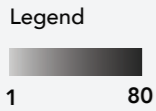
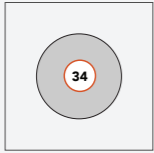
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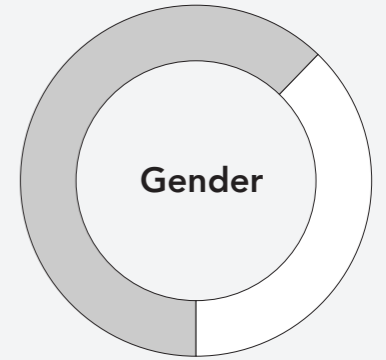
# 2025 sample

## Respondents in each country

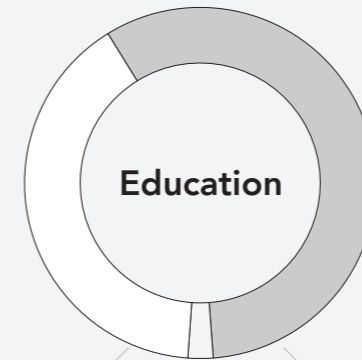
EU citizens outside EU



40% Policy, 3% Other, 57% Academia

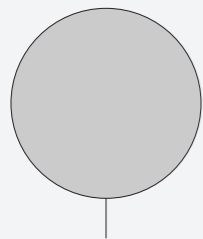


63% Male, 37% Female



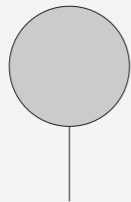
40% Masters or equivalent, 2% Bachelor or equivalent, 58% Doctoral or equivalent

## Expertise



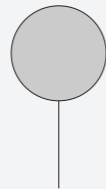
40%

EU foreign policy



16%

EU domestic policy



10%

Regional expertise outside the EU



10%

Other EU expertise



7%

None of the others



5%

EU economy



5%

Regional EU expertise



4%

Single EU country expertise



3%

Defence and security

# Institutional partners

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## The Robert Schuman Centre for Advanced Studies

The Robert Schuman Centre for Advanced Studies (RSCAS) at the European University Institute (EUI) in Florence is a multidisciplinary research institute focused on European integration and global governance. The RSCAS conducts policy-relevant research on topics such as governance, migration, climate policy, and international cooperation. It fosters dialogue between academics, policymakers, and practitioners through research projects, conferences, and training programs, aiming to bridge the gap between scholarship and policymaking while addressing both European and global challenges. For further information about RSCAS, visit [www.eui.eu/en/academic-units/robert-schuman-centre-for-advanced-studies](http://www.eui.eu/en/academic-units/robert-schuman-centre-for-advanced-studies)

The European Governance and Politics Programme (EGPP), a flagship programme of the Schuman Centre, is an international hub of high-quality research and reflection on Europe and the European Union. For more information about the EGPP, visit <http://europeangovernanceandpolitics.eui.eu>

## The European Union Institute for Security Studies

The European Union Institute for Security Studies (EUISS), established in 2002 and headquartered in Paris, is the EU's agency for foreign, security, and defence policy analysis. It supports the Common Foreign and Security Policy (CFSP) and Common Security and Defence Policy (CSDP) by providing independent research, strategic foresight, and policy-relevant analysis. Through publications, conferences, and workshops, the EUISS addresses global security challenges, including geopolitical shifts, cyber threats, terrorism, and climate security, aiding EU institutions and member states in informed policymaking and strategic planning. For further information about the EUISS visit <https://www.eiiss.europa.eu/>

## The Trans European Policy Studies Association (TEPSA)

The Trans European Policy Studies Association (TEPSA) is the oldest network of research institutes in Europe, established in 1974. Based in Brussels, it connects leading European policy institutes to promote research, analysis, and debate on European integration and policies. TEPSA provides expert advice to EU institutions, organizes conferences, and publishes policy papers to foster informed decision-making. Its activities focus on EU governance, foreign affairs, and economic policies, enhancing dialogue between policymakers, academics, and citizens across Europe. For further information about TEPSA, visit <https://tepsa.eu/>

## The European Initiative for Security Studies

The European Initiative for Security Studies (EISS) is a network of academic institutions and scholars dedicated to advancing research and dialogue on European security. It serves as the largest and most diverse gathering of scholars and practitioners focused on security studies across Europe. EISS promotes collaboration, intellectual exchange, and policy-relevant research on topics such as defence policy, military strategy, and regional security dynamics. Through annual conferences and academic workshops, it fosters cross-national dialogue and enhances understanding of contemporary security challenges. For further information about the EISS, visit <https://eiss-europa.com/>

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